

UK Tractors Market - Industry Analysis and Forecast 2022-2028

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Report description:

UK tractors market is expected to grow at a CAGR of 3.73% during 2022-2028.

MARKET INSIGHTS

The 141-200 HP segment accounted for the largest share in 2021. The country needs to boost its production capacity to feed its ever-growing population, which stood at 68.2 million in 2021. The production of major crops in the country increased in 2018 and is expected to grow during the forecast period continuously. This increase can be attributed to farmers relying on farm mechanization and improving their crop production by reducing the yield gap.

KEY HIGHLIGHTS

- The UK was the fourth-largest tractor market in Europe in 2021, with an overall sale of 13,572 units. There was an increase in crop production and tractor sales in 2021 due to incentives and loans offered to farmers by the UK government, which helped the country to recover from the COVID-19 pandemic.
- England and Scotland region of the country reportedly showed a higher market share for agriculture machinery than other regions in 2021. England region is expected to witness the highest growth during the forecast period.
- UK tractor registrations are a broad indicator of the strength of the domestic market for agricultural equipment. In value terms, the cost of tractors, plus parts and accessories, accounts for almost 50% of farmers' spending on equipment, making this a prime indicator for industry growth.

MARKET TRENDS & OPPORTUNITIES

- There is a trend of feminization of agriculture due to the migration of men to urban cities in the UK agriculture sector, which drives the demand for tractors and other agricultural machinery to perform farming activities.
- The trend of alternative fuel-based tractors is growing in the country. Farmers are more fuel-conscious and moving toward green

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farming. Also, agriculture is expected to flourish with the help of precision farming and telematics in tractors, which bodes well for the country's agriculture tractor market.

-□The Positive Agriculture project aims to improve the living conditions of those who are part of the agricultural supply chain and to provide 100% of the essential raw materials sustainably.

-□There is a rapid increase in innovation and extensive use of robotics and AI worldwide. The current way of farming will likely be revolutionized using autonomous machinery and agricultural robots, which will perform time-consuming tasks much more efficiently and effectively.

-□Several original equipment manufacturers (OEMs) shifted their focus from matured markets in England to the underpenetrated states of Scotland. The agriculture farm machine market is currently in the growth stage, and manufacturers are looking for capacity augmentation in the country. The Wales region still has negligible farm mechanization, and vendors can explore these regions with a portfolio of small tractors suitable for hilly terrains.

Government's Agriculture Incentives

-□The government needs to ensure self-sufficiency in food grain production to fulfill the needs of the large population. To support that, the government is consistently increasing its budget allocation to agriculture and allied activities. The government also implements schemes, such as CAP, with fertilizers, electricity, and fuel subsidies.

-□There is an increase in the presence of agriculture-focused Non-Banking Financial Companies in the country. These corporations enable small and medium-scale farmers to buy agricultural machinery for their farms on credit, which helps boost agricultural machinery sales. Tractors represent more than 50% of the total agricultural equipment sold in the country.

The Labor Shortage in the UK Leading to the Mechanization of Farms.

-□Money and time can be saved, and farm yields can be increased by adopting technologically advanced tractors and implements. The UK government plans to increase the rate of farm mechanization among farmers, which will boost the demand and sales of new tractors. The mechanization of farms is deemed necessary in the UK to increase crop production.

-□Small farmers frequently encounter labor shortages for field preparation, sowing, and inter-culture operations during peak seasons. Farm machinery can efficiently accomplish specific agricultural duties. These factors can help the industry to grow in the forecast period.

UK TRACTOR MARKET SEGMENTATION

The research report includes a detailed segmentation by HP type, wheel drive, and countries.

The 141-200 HP segment witnessed the highest growth of 33.1% in 2021 and is expected to ascend more during the forecast period.

The UK agriculture tractor market is segmented based on the HP it can generate. The younger generation of farmers understands the difference between the power output of an unencumbered engine and the power that transmits through a PTO shaft. Farmers know that tractors in the same HP range can provide varying HP in the PTO shaft. Such factors make potential buyers look for other options and make informed purchase decisions.

Tractors in the power range of 141-200 HP were the most substantial contributors to the market's growth in the UK in 2021 and are expected to grow with the same trend. Some factors that favor the sales in the 141-200 HP range are as follows:

-□Versatility

-□Presence of hard soil in the England region of the UK

-□Increase in purchasing power of farmers due to better Minimum Support Price (MSP) and crop realization

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Segmentation by Horsepower

- Less than 50 HP
- 50-100 HP
- 101-140 HP
- 141-200 HP
- 201-240 HP
- Above 240 HP

2WD Segment Dominated the UK Tractor Market

Market players redesign their 2WD tractors with more power and features so that farmers can upgrade their tractors as per their requirements. Features like fuel efficiency added comfort for operations in confined spaces, and better light has helped the 2WD segment dominate the industry. Thus, manufacturers now customize their products according to the market and end-user requirements.

The 2-wheel drive segment dominated the UK farm tractor market, and the trend is expected to continue during the forecast period.

Some reasons behind the popularity of the 2WD category are as follows:

- Conventional choice of farmers
- Low cost of ownership
- Availability of spare parts

Segmentation by Drive Type

- 2-Wheel-Drive
- 4-Wheel-Drive

COMPETITIVE ANALYSIS

- John Deere equipped many tractor models with GPS, location tracking, image sensors, and telematics to assist navigation. The company has also equipped its S700 with features to autonomously adjust the harvesting equipment according to the state of the crops.
- Most companies are developing autonomous or self-driving offerings in the agriculture industry. In 2022, John Deere US-based company, showcased an autonomous tractor at CES.
- The agriculture machinery market in the UK is currently in the growth stage, and manufacturers are looking for capacity augmentation in the country. The Wales region of the country still has negligible farm mechanization, and vendors can explore these regions.
- The young generation of farmers is a promising customer base. This category also displays a minimal tendency to stick to a particular brand and is more open to switching to other economic brands. The tendency to explore new options can change buying sentiments among younger farmers. Thus manufacturers can attract and retain the attention of the new generation of buyers by creating value additions that resonate with the latter's needs.
- England and Scotland are high agrarian regions that witnessed high tractor sales in the past few years. Leading vendors, such as John Deere and CNH, focus on the market in these prime regions of the UK.

Segmentation by Regions

- o□ England

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- o□Wales
- o□Scotland
- o□Northern Ireland

Key Vendors

- John Deere
- CNH Industrial
- AGCO
- Kubota

Other Prominent Vendors

- Same Deutz-Fahr
- CB
- TAPE
- Foton
- Iseki
- Yanmar
- Arbos Group

KEY QUESTIONS ANSWERED

- 1.□What is the growth rate of the UK Tractor Market?
- 2.□What are the expected units to be sold in the UK tractors market by 2028?
- 3.□Who are the Key Players in the UK Tractor Market?
- 4.□Which wheel drive tractors hold the largest market shares in the UK region?
- 5.□Which companies will dominate the UK tractor market share?

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