

## **Poland Tractor Market - Industry Analysis & Forecast 2022-2028**

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### **Report description:**

The Poland tractor market is expected to grow at a CAGR of 4.12% during 2021-2028.

### **MARKET OVERVIEW**

In 2021, the 51-100 HP segment accounted for the largest market share based on horsepower.

Poland has over 37.8 million food consumers and is the fifth-largest tractor market in Europe. The country witnessed a massive increase in agricultural and industrial productivity and farm mechanization. In 2020, Poland exported USD 820 million worth of tractors. The major export markets of Polish farm tractors include Germany, Russia, the UK, Ukraine, and Turkey.

Poland's government plans to double the quantity and revenues from agricultural products exported by 2025, with the share of agricultural exports growing rather slowly. The government identifies regions according to their current production of export foods and their potential to increase production with the help of new institutional reforms.

### **KEY HIGHLIGHTS**

- In 2020, Poland imported USD 1.8 billion worth of tractors, of which 24.7% was from the Netherlands, 21.0% from Germany, and 10.7% from France.
- The Poland tractor market grew by 40.8% in 2021 from 2020. The increase in crop production and tractor sales was due to a favorable climate in 2021.
- The Polish government plans schemes and initiatives to facilitate credit and improve agriculture-related operations, which will contribute to the growth of the overall value chain of the market.
- The technology needs of Polish farmers are diverse. The country's agricultural economy is progressing towards larger-scale commercial production and greater productivity, shifting away from subsistence agriculture and labor-intensive farming practices.
- The Western region industry witnessed the highest growth rate of CAGR of 4.85% during the forecast period. Technological

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improvements such as IoT-based sensor networks, weather forecasting, etc., in Western region agricultural production, can create awareness of new tractors and improved implements, which will help increase farm yields.

## MARKET TRENDS & OPPORTUNITIES

### Use of Energy-efficient Tractors

The Polish government aims to improve the living conditions of those who are part of the agricultural supply chain and sustainably provide essential equipment. This aim joins an already announced objective to reduce total greenhouse gas (GHC) emissions by around 40% by 2030 and zero emissions by 2050. The adoption of energy-efficient tractors will enable the fulfillment of these objectives and boost the Poland tractor market.

### Use of Non-conventional Fuels in Tractors

Manufacturers in Poland focus on the development of alternate fuel-based tractors. Tractors that run on liquefied natural gas (LNG), compressed natural gas (CNG), propane, diesel, and kerosene are available these days.

## SEGMENTATION ANALYSIS

### INSIGHTS BY HP TYPE

Poland tractor market is segmented based on the HP that a tractor can generate. In 2021, the 50-100 HP segment recorded high growth in Poland. The primary factor for the steady growth of the medium-power range of tractors is the high business turnover among hobby and livestock farmers. The demand for 101-180 HP tractors is expected to increase in Poland during the forecast period. Poland is a major industry for low to medium-HP tractors owing to its small and medium-scale farms and intensive farming. This segment mainly includes semi-trailer tractors with a customer base of medium-scale agriculture and hobby farmers.

Above 180 HP tractors are mainly used in large-scale farms. Large farms, more than 30 hectares, in Poland account for more than 9% of the total land holdings. This drives the demand for above 180 HP tractors, which will continue during the forecast period. Above 180 HP tractors have applications in large farms with extensive farming operations and non-farming activities. The sales of Above 180 HP tractors in the Poland tractor market are expected to remain steady during the forecast period as farm sales are likely to remain the same in the coming years.

### Segmentation by Horsepower

- Less than 50 HP
- 50-100 HP
- 101-180 HP
- Above 180 HP

### INSIGHTS BY WHEEL DRIVE

The Poland tractor market is dominated by mid-range HP 2WD tractors, which accounted for a market share of 98.2%. 2WD tractors are the most preferred tractors by farmers in the country. The low relative cost of ownership and numerous features and haulage power make 2WD tractors more popular among farmers. The majority shares of the 2-wheel drive tractors segment are held by New Holland, John Deere, and Kubota.

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Industry players redesign their 2WD tractors with more power and features so that farmers can upgrade their tractors as per their requirements. They try adding features like fuel efficiency and comfort for operations in confined spaces to attract more customers. Thus, manufacturers now customize their products according to the industry and end-user requirements.

#### Segmentation by Drive Type

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

#### REGIONAL ANALYSIS

In 2021, the Eastern and Western regions recorded a higher demand in the Poland tractor market. Strong demand for agriculture tractors is expected to come from the Western region, with a CAGR of 4.85% during the forecast period. The size of the farms in the western and northern voivodeships (regions) necessitates using stronger, more expensive tractors. Additionally, the farms in these areas have more potential to get EU funding and produce higher revenue. These elements enable farmers in the areas mentioned above to purchase tractors with superior technological specifications, particularly those with greater power.

#### Segmentation by Regions

- Poland
  - o□Northern
  - o□Eastern
  - o□Western
  - o□Southern

#### VENDOR LANDSCAPE

- New Holland and John Deere dominated the Poland tractor market with a collective industry share of over 20% in 2021. The threat of rivalry is high in Poland's agriculture tractor market since more than 39% of the share is held by the top five players.
- Deere & Company showcased their fully autonomous tractor for massive agricultural productivity at CES 2022 in January 2022. After 2022, farmers will be able to purchase this.
- Yanmar Holdings Co. Ltd. introduced a vineyard robot that offers a variety of benefits, including greater safety, cost savings, output, and versatility in October 2021.

#### Key Vendors

- John Deere
- CNH Industrial
- AGCO
- Kubota

#### Other Prominent Vendors

- Deutz-Fahr
- Escorts
- CB
- Iseki Farm Implement Trading Co.
- Yanmar

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## KEY QUESTIONS ANSWERED

1. How many tractors are sold in Poland each year?
2. What is the growth rate of the Poland Tractor Market?
3. How many tractors are expected to be sold in Poland by 2028?
4. Who are the key players in the Poland tractor market?
5. Which type of tractors holds the largest market share in Poland?
6. Which regions in the country dominate the Poland tractor market?

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