

UK Agriculture Equipment Market - Industry Analysis & Forecast 2023-2028

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Report description:

The UK agricultural equipment market is growing at a CAGR of 3.59% during 2022-2029.

The UK accounted for around 9% of the agricultural equipment sold in Europe in 2022. This represents that the UK market provides a significant opportunity to OEMs for agriculture equipment sales. In 2022, the tractor segment accounted for the largest market share of the overall industry by equipment type.

The agriculture equipment market in the UK experienced growth from 2014 to 2018. However, the industry witnessed a sharp decline from 2019 to 2020, and the domestic agricultural equipment industry declined due to the COVID-19 pandemic. Further, the demand for agriculture equipment is highly dependent on the annual rainfall in the country. Several original equipment manufacturers (OEMs) shifted their focus from matured markets in England to the underpenetrated states of Scotland. The UK agricultural equipment market is currently in the growth stage, and manufacturers are looking for capacity augmentation. Wales has little farm mechanization, and vendors can penetrate the market with a portfolio of small equipment suitable for hilly terrains.

Governments must adopt effective and sustainable farming practices to ensure food security and safety. Developed countries implement the concept of precision agriculture to increase productivity, while the level of agricultural mechanization is still low in developing countries. The focus on agricultural mechanization will increase the demand for agriculture equipment and the sense of accuracy in farming using technologically advanced equipment in the UK.

KEY HIGHLIGHTS

- The UK has over 68.9 million food consumers and is the fourth-largest food market in Europe. The country witnessed a massive increase in farm mechanization in terms of agricultural and industrial productivity.
- The agriculture equipment industry in the UK grew by 2.3% in 2022 from 2021. The increase in crop production and agricultural equipment sales was due to the favorable climate in 2022.
- The UK government plans schemes and initiatives to facilitate credit and improve agriculture-related operations, which will contribute to the growth of the UK agricultural equipment market.

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MARKET TRENDS & OPPORTUNITIES

Use of Energy-Efficient Agricultural Equipment

The Positive Agriculture project aims to improve the living conditions of those who are a part of the agricultural supply chain and to provide essential equipment sustainably. This aim joins an already announced objective to reduce total greenhouse gas (GHC) emissions by 40% by 2030 and zero emissions by 2040. The adoption of energy-efficient agricultural equipment will enable the fulfillment of these objectives.

Use of Non-conventional Fuels in Tractors

Conventionally, farmers used diesel engine tractors known for their high power. Due to machine technologies and engine advances, tractors are now more efficient and can complete tasks with fewer power requirements. The volatility in diesel prices hampers the budget management of farmers. The UK agricultural equipment market witnesses a huge demand for tractors that run on different fuels. Fluctuating prices of conventional fuels, such as diesel, affect the sales of tractors. Thus, manufacturers focus on the development of alternative fuel-based tractors. Nowadays, tractors that run on LNG, CNG, propane, diesel, and kerosene are also available.

Assistance to Farmers Through Loans & Subsidies

Agriculture is a major source of income for the UK economy. Therefore, the government sustains and empowers UK farmers. The UK government launched several policies and missions to help farmers by providing them with financial assistance, better infrastructure, competitive crop prices, loan waivers, and subsidies. The government is also keen to improve the current state and adoption of farm mechanization in the UK. The government in the UK runs several agricultural schemes, and the younger generation of farmers takes advantage of the same. The Rural Development Programme of the UK Productivity Scheme provides funding for projects in the country that improve productivity in the farming and forestry sectors and helps create jobs and growth in rural areas. Such assistance factors by the government are projected to support the UK agricultural equipment market growth.

SEGMENTATION INSIGHTS

INSIGHTS BY EQUIPMENT TYPE

The tractor segment of the UK agricultural equipment market witnessed shipments of 13,857 units in 2022. And accounts for more than 47% of the share in the equipment type segment. The demand for high-power tractors is largely driven by large-scale farmers and government institutions focusing on rental services, as there are many farmers in the country with land over 10 hectares. Large-scale farmers in the country have high purchasing power and can afford more expensive and advanced equipment. A hike in demand for tractors is predicted in 2024-2025 due to changes in emission rules coming into effect by the end of 2022. This will permit the use of old or high-emission tractors in the country after that. Farmers will, therefore, have to opt for the new advanced tractors, hence boosting the tractor segment of the UK agricultural machinery market.

The planting equipment segment of the UK agricultural equipment market is expected to grow at a CAGR of 3.59% during the forecast period. The demand for planting equipment in the nation will rise as the agricultural industry expands. The conventional sowing technique has been replaced with planting machinery. In hand sowing, it can be challenging to distribute seeds with consistency and accuracy. Equipment for planting provides consistency in less time. Planting equipment has made work simpler, easier, and much more productive. The agriculture industry has seen a substantial increase in production and efficiency because of automation. The UK agricultural equipment market for planting equipment is primarily driven by improved efficiency, simple processing, and enhanced production.

Segmentation By Equipment Type

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- Tractors (Horsepower and Wheel-Drive)
- Planting Equipment (Seeder, Planter, and Transplanter)
- Tillage Equipment (Plough, Harrow, and Tiller)
- Sprayer
- Harvesting Equipment (Combine Harvester and Self-Propelled Forages)
- Mowing Equipment (Mower and Windrower)
- Others (Loaders and Balers)

INSIGHTS BY APPLICATION TYPE

The post-harvesting segment of the UK agricultural equipment market witnessed shipments of 12,082 units in 2022 and is the largest application type segment. Farmers use the related post-harvest machinery and equipment and can transform themselves from more "produce" to "producer-cum-processor". With the help of post-harvest technologies appropriate for cost, time, and labor savings towards enhancement of quality and marketability to their produce by value addition and by-products utilization, in addition to reducing post-harvest costs. Key objectives of post-harvest technology are:

- Reduce damage in quantity or volume and the product's qualitative or nutritional value.
- To increase the shelf life of the crops.
- To maintain the excellent quality of the produce (color, flavor, taste, aroma).

Segmentation By Application Type

- Land Development and Seed Bed Preparation
- Sowing and Planting
- Plant Protection
- Harvesting and Threshing
- Post Harvesting

VENDOR LANDSCAPE

CNH Industrial, AGCO, and John Deere dominated the UK agriculture equipment market with a more than 40% industry share. These players focus on innovation to compete in the industry and invest in developing advanced agriculture equipment technology for precision farming and machine automation. The industry has many established players that provide their products for use in open fields, vineyards, and others. The threat of new vendors in the country is quite low.

Recent Developments In The UK Agriculture Equipment Market:

- In March 2022, John Deere launched the new electric variable transmission (EVT) for select 8 Series Tractors and a new JD14X engine for 9 Series.
- Massey Ferguson launched the MF 6S series tractors in February 2022. This machine provides up to 180 HP with advanced technology.
- In March 2021, CNH Industrial partnered with Monarch Tractors, a US-based agri-technology company, to improve long-term sustainability and raise awareness of the importance of zero-emission agriculture among farmers.
- Massey Ferguson launched the MF 8S series tractors in July 2020. A guard-u install engine and a neo-retro design distinguish this series of tractors. These tractors are designed to advance smart farming technologies.

Key Vendors

- John Deere
- CNH Industrial
- AGCO
- Kubota

Other Prominent Vendors

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- []SDF
- []CB
- []CLAAS
- []TAFE
- []Foton Motor
- []ISEKI & Co., Ltd.
- []Yanmar
- []Arbos Group

WHY SHOULD YOU BUY THIS REPORT?

This report is among the few in the market that offer outlook and opportunity analyses forecast in terms of:

- []Market Size & Forecast Volume (Units) 2020?2028
- o[]Segmentation by Equipment Type
- o[]Segmentation by Application Type
- []Major current and upcoming projects and investments
- []Competitive intelligence about the economic scenario, advantages in the UK, industry dynamics, and market shares
- []Latest and innovative technologies
- []Import and export analysis
- []COVID-19 impact analysis of the industry
- []Company profiles of major and other prominent vendors
- []Industry shares of major vendors

KEY QUESTIONS ANSWERED

- []How big is the UK agricultural equipment market?
- []What is the growth rate of the UK agricultural equipment market?
- []What are the expected units sold in the UK agricultural equipment market by 2028?
- []Which application type holds the largest UK agricultural equipment market share?
- []What are some significant trends in the UK agricultural equipment market?
- []Who are the key players in the UK agricultural equipment market?

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