

## **India Combine Harvester - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

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### **Report description:**

The Indian combine harvester market size is estimated at USD 245.01 million in 2024 and is expected to reach USD 323.65 million by 2029, registering a CAGR of 5.7% during the forecast period (2024-2029).

The market for combined harvesters in India has proliferated over the past few years. This is due to the rising farm mechanization to raise agricultural productivity, the growing land area for the cultivation of grain crops, and the support from the government. According to the Indi Council of Agricultural Research (ICAR), in India, the harvesting and threshing operations for major cereals, pulses, oil seeds, millets, and cash crops, except rice and wheat, are nearly 32% mechanized. The mechanization levels of harvesting and threshing in rice and wheat crops are more than 60%. This shows increased use of combine harvesters for harvesting and threshing operations, supporting market growth.

The cultivation area under various crops has also risen over the recent years. For instance, according to the Directorate of Economics and Statistics, the total area for cultivating coarse cereals across India increased from 24.0 million hectares in 2020 to 24.1 million ha in 2021. This provides great opportunities for market entrants in the combine harvesters segment. Major agriculture machinery manufacturers are expanding their manufacturing facilities to increase the production of combine harvesters, which favors the market. For instance, in 2023, Mahindra & Mahindra Farm Equipment Sector (FES), a part of Mahindra Group, set up a farm machinery plant in Pithampur, Madhya Pradesh. The new plant is spread over 23 acres and can manufacture 1,200 combine harvesters annually.

India Combine Harvester Market Trends

High Cost of Farm Labor

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Agriculture is a primary livelihood source for a large population group. As per the Indian Economic Survey 2020 -21, agriculture employs nearly 40% of the Indian workforce. The rise in urbanization trends observed in the country results from the expanding population. According to the World Bank data, urbanization increased from 34.9% to 35.3% from 2020 to 2021. This resulted in the migration of rural households to the nearby cities, leading to the scarcity of farm labor in the country. For instance, the workforce employed in agriculture dropped from 44.3% to 43.9% from 2020 to 2021, as per the World Bank data. The agricultural industry of the country heavily relies on manual labor, and the decreasing workforce in agriculture has led to major challenges in performing farming operations such as harvesting. As a solution to this problem, advanced harvesting machinery has become increasingly popular for performing these agricultural operations effectively and efficiently.

### Increasing Consumption of Grain Crops

Cereals are an integral part of Indian cuisine, and the country is one of the largest producers and consumers of cereals and grains. The area harvested from cereals and grains is increasing in the country. For instance, according to FAOSTAT, the area harvested under cereals rose from 100 million hectares in 2020 to 102 million hectares by 2021. As combines are mainly used for cereals, the usage of these equipment is increasing, driving the market growth. Combine harvesters reduce farmers' dependency on laborers and save time, making harvesting more accessible and hassle-free and becoming one of the most valuable implements for Indian farmers. Therefore, the increasing availability of area harvested under grain crops, coupled with government initiatives and the launch of grain harvester products, is anticipated to propel the market growth during the forecast period.

### India Combine Harvester Industry Overview

The Indian combined harvester market is consolidated. Claas India, Preet Group, Kubota Corporation, Mahindra & Mahindra Ltd, and Kartar Agro Industries Private Limited are the major market players. Companies compete based on product quality and promotion and focus on strategic initiatives to account for prominent market shares. They are also heavily investing in developing new products while collaborating with and acquiring other companies, which may increase their market shares while strengthening their R&D activities.

### Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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