

## **France Tractor Market - Industry Analysis & Forecast 2024-2029**

Market Report | 2024-06-20 | 177 pages | Arizton Advisory & Intelligence

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### **Report description:**

The French tractor market size is expected to grow at a CAGR of 3.93% from 2023-2029.

The market is expected to witness considerable year-over-year (YoY) growth due to the following factors:

- Shortage of Farm Labor: The agricultural sector is experiencing a labor shortage, driving the demand for mechanized farming equipment, including tractors, in the France tractor market. Tractors enable farmers to perform various tasks more efficiently and productively, relying less on manual labor.
  - High Demand for Efficient and Advanced Tractors: Farmers increasingly demand efficient and advanced tractors to reduce operating costs and improve productivity. Tractors with advanced features such as GPS guidance, telematics, and precision agriculture capabilities are in high demand. In addition, companies are investing in fuel-efficient tractors that can run on non-conventional fuels like biodiesel and others.
  - Launch of Several Schemes in the Agricultural Sector: The French government is implementing various schemes to promote agricultural mechanization. These schemes typically provide subsidies or financial assistance to farmers to purchase agricultural machinery, including tractors.
  - Shift Toward Electric-Powered Tractors: Electric-powered tractors are gaining popularity in the France tractor market due to their environmental benefits and lower operating costs. Electric tractors produce zero emissions, which helps reduce greenhouse gas emissions and air pollution. In addition, they have lower operating costs than diesel-powered tractors, as electricity is cheaper than diesel fuel.
  - Advent of Intelligent & Smart Tractors: Intelligent and smart tractors are equipped with advanced technologies, such as artificial intelligence (AI) and machine learning (ML), enabling them to perform tasks more autonomously and efficiently. Intelligent tractors can self-drive, navigate fields, and make decisions about crop management.
- In addition to the above factors, the growth of the France tractor market is also driven by the increasing demand for food products and the expansion of agricultural land. Farmers are adopting mechanization to meet the growing food demand and improve profitability.

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## KEY HIGHLIGHTS

- The French agriculture market is expected to grow in the coming years, driven by increasing population, rising urbanization, and changing dietary patterns.
- The France tractor industry is highly concentrated, with the top players controlling most of the market. Domestic and global brands, on the other hand, are equally represented in the market.
- Several government plans, schemes, and initiatives to facilitate credit and improve agriculture-related operations will contribute to the market's overall value chain growth.
- The France tractor market increased by 2.1% in 2023 compared to 2022. The increase in crop production and tractor sales was due to government support for farmers and favorable climate conditions.

## MARKET OPPORTUNITIES

### -□ Increasing Use of Bioenergy in Agricultural Tractors

Conventionally, farmers used diesel engine tractors known for their high power. Tractors are now more efficient and can complete tasks with less power requirements due to advances in machine technologies and engines. The volatility in diesel prices hampers farmers' budget management. Thus, the agricultural tractor industry witnesses a considerable demand for tractors that run on different fuels, such as plant-oil and biogas-powered tractors.

### -□ Technological Advances in Tractor Technology

A new frontier of innovation emerged as agriculture met digital technology, opening various paths to a smart agricultural future. Tractor manufacturers are competitive, and companies constantly strive to innovate and ensure product differentiation at affordable prices. State-of-the-art technology-based tractors are currently available in the market. GPS and remote sensing make farming more accurate and productive.

## SEGMENTATION INSIGHTS

### INSIGHTS BY HORSEPOWER

The 50HP-100HP segment is a strong performer in the France tractor market, holding the largest industry share in 2023. This segment caters to medium-scale farmers typically owning 10-20 acres of land. Here's a breakdown of some key points:

- **Popularity:** These tractors are popular because of their versatility. They can handle various tasks like soil preparation, irrigation, weeding, harvesting, hauling equipment, and crops.
- **Growth Factors:** The growth of this segment is driven by increased business turnover among hobby and livestock farmers and the need for efficient tractors due to rising fuel costs.
- **Major Players:** John Deere, CNH Industrial, AGCO, and Kubota are some of the leading brands in the French tractor market, likely offering options in the 50HP-100HP range.
- **Trends:** Technological advancements like precision agriculture using GPS and bio-fuel options are gaining traction in the French tractor market, and these features might be available in some 50HP-100HP models.

Overall, the 50HP-100HP tractor segment is crucial for the France tractor industry, and its future looks favorable due to rising farm mechanization and a growing demand for efficient tractors.

### Segmentation by Horsepower

- Less Than 50 HP
- 50-100 HP
- 101-150 HP
- 151-200 HP

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- 201-300 HP
- Above 300 HP

## INSIGHTS BY DRIVE TYPE

The France tractor market is dominated by low-range HP 2WD tractors. Among the several tractor models available in the country, 2WD tractors are the most favored by farmers. The low relative cost of ownership, the sufficiency of features and haulage power, and convention make 2WD tractors more popular among farmers. Ease of driving and flexibility with light loads and in plain fields are major factors that boost the demand for two-wheel-drive tractors. John Deere, New Holland, and Claas share most of the 2-wheel drive tractors segment.

### Segmentation by Drive Type

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

## REGIONAL ANALYSIS

The north zone leads the country in the adoption and penetration of farm mechanization practices. The major agricultural states in the north zone are Hauts-de-France, Ile-de-France, and Centre Val-de-Loire. The agriculture and food industry in the north zone is strong and well-established. The Hauts-de-France region is known for its agriculture, which is highly developed, productive, and diverse. Furthermore, in 2023, the North region held the largest share of the France tractor market, accounting for over 32%. Also, the states in the country's northern zone have a higher level of mechanization than any other part of the country.

### Segmentation by Geography

- France
- North
- South
- East
- West

## COMPETITIVE LANDSCAPE

The France tractor market is characterized by various global vendors that account for most of the industry share. Therefore, it would be difficult for new players to compete with well-established vendors in the industry. The key competitive factors of the industry players include efficiency, product reliability & availability, after-sales service, and price. Furthermore, the key players in the France tractor market include John Deere, CNH Industrial, AGCO Corporation, and Kubota Corporation. These companies invest heavily in research and development (R&D) to develop new and innovative tractor technologies. They are also expanding their presence in emerging markets to capitalize on the growing demand for agricultural tractors.

Competition in the France tractor industry in pursuing large-scale farming is intense. Agriculture industries experiencing slow growth tend to foster a competitive environment heavily influenced by price due to supply balancing demand. Also, price competition tends to be more significant for new tractor orders than aftermarket services. Considering the forecast for 2029, pricing for new tractor orders is expected to be a particularly influential competitive factor. Furthermore, competition in the aftermarket portion is primarily against large, well-established national and global competitors and, in the country, against the local companies.

### Key Company Profiles

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- []AGCO
- []CNH Industrial
- []John Deere
- []Kubota
- []Mahindra

#### Other Prominent Vendors

- []Antonio Carraro
- []Arbos Group
- []BCS Group
- []Branson Tractors
- []Captain Tractors
- []Claas
- []Iseki
- []JCB
- []KIOTI
- []Lovol
- []LS Tractors
- []McCormick
- []Same Deutz-Fahr
- []Solis
- []TAFE
- []TYM Corp.
- []VST Tillers Tractors
- []Yanmar
- []Zetor

#### KEY QUESTIONS ANSWERED:

- 1.[]What are the expected units sold in the France tractor market by 2029?
- 2.[]What is the growth rate of the France tractor market?
- 3.[]Which region holds the largest France tractor industry share?
- 4.[]How big is the France tractor market?
- 5.[]Who are the key companies in the France tractor market?

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