

Australia Agricultural Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Australia Agricultural Machinery Market size is estimated at USD 6.21 billion in 2025, and is expected to reach USD 7.23 billion by 2030, at a CAGR of 3.1% during the forecast period (2025-2030).

Agriculture accounts for roughly 4% of Australia's GDP. The nation has consistently progressed in agricultural mechanization. Rising demand for agricultural machinery stems from a push for enhanced productivity and quality, even as the farming population dwindles. In 2023, Australia's agricultural machinery sales hit USD 5.9 billion, up 5.4% from 2022, as reported by the Tractor & Machinery Association in "The State of the Industry 2023". Sales of combine harvesters and headers were notable, raking in USD 1.17 billion. Meanwhile, new tractor sales saw a 1.8% uptick, influenced by a shift away from lower HP ranges.

Advanced technologies, such as AI and robotics, alongside investments from major players and a surge in government initiatives, have fueled the demand for agricultural machinery. A case in point: In 2022, John Deere unveiled its P600 Precision Air Hoe drills, boasting a 15.5% wider working width and 24% lighter weight than the P500, aiming to reduce compaction, labor time, and fuel use while enhancing productivity and seed-soil contact. Australian farmers have been gradually becoming tech-savvy, and the adoption of GPS software products and tractors equipped with telematics is anticipated to spur sales of agriculture machinery over the forecast years. Furthermore, the growing usage of cost-cutting strategies for designing advanced farm equipment is projected to offer key growth opportunities for players.

Australia Agricultural Machinery Market Trends

Rising Preference for Farm Mechanization

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Australian farmers are increasingly turning to innovative techniques, such as data science, automation, and advanced communication technologies, to modernize their agricultural machinery. This includes tractors, harvesters, and irrigation equipment. For example, in 2023, John Deere introduced its 1 Series Round Balers in Australia, featuring Bale Doc technology for near real-time documentation of bale moisture and weight. Responding to consumer demand, both international and domestic manufacturers are unveiling advanced tractors for diverse farming applications. In 2023, CNH Industrial's Case IH brand rolled out the Farmall Subcompact 25SC, the smallest in its Farmall range. This tractor targets the burgeoning lifestyle segment, catering to the rising demand for small utility tractors on larger home blocks.

As per the Tractor and Machinery Association of Australia, the most sought-after equipment includes self-propelled boom sprayers, high-density balers, tracked tractor technology, and automated feeding systems. Australia stands as a pivotal export market for U.S. agricultural machinery and equipment manufacturers. With nearly 95% of Australia's farm machinery and equipment being imported, and demand on the rise, it's noteworthy that most of Australia's tractors, harvesting, and haymaking gear hail from Europe and the U.S. This robust demand is largely attributed to improved seasonal conditions across many regions. From 2019-20 to 2021-22, Australia averaged annual imports of USD 1.7 billion in agricultural machinery. Consequently, the trend towards cost-effective design strategies in advanced farm equipment presents significant growth opportunities for industry players.

Demand Surges for Cultivators and Tillers in Australia

In Australia, cultivators play a pivotal role in soil preparation, managing crop residues, controlling weeds, and ensuring crops receive adequate water and nutrients. The tiller machinery market is witnessing a surge in demand, largely attributed to its affordability, appealing especially to budget-conscious small-scale farmers. Sales in the Tillage and Seeding Machinery market hit USD 510.6 million in 2023, buoyed by price hikes, as reported by the Tractor and Machinery Association of Australia.

Small-scale farmers in Australia, keen on trimming agricultural costs, are propelling this market growth. This uptick in demand is further bolstered by a shrinking agricultural workforce and escalating labor costs. The Australian Farm Institute highlights that Australia boasts the world's fourth-highest wage rates. With a dwindling pool of manual laborers, farmers are turning to machinery to uphold productivity. Additionally, market prospects look promising, bolstered by initiatives like concessional loans from the Regional Investment Corporation (RIC) and agricultural investments from the Rural Research and Development Corporations (RDC).

Australia Agricultural Machinery Industry Overview

The Australian agricultural machinery market is consolidated, with major players accounting for the majority of the market share. Some major players in the market are Deere & Company, AGCO, Kubota, CLAAS, and CNH Industrial. These players are involved in various strategic activities such as product innovation, expansion, partnership, and merger and acquisition.

Additional Benefits:

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

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