

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

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### **Report description:**

The Cambodia Agricultural Machinery Market size is estimated at USD 10.84 million in 2025, and is expected to reach USD 13.96 million by 2030, at a CAGR of 5.2% during the forecast period (2025-2030).

#### Key Highlights

- The agricultural machinery market in Cambodia is anticipated to witness steady growth during the study period. The key factors include the increasing focus of farmers on sustainable agricultural mechanization, rising public-private partnerships in Cambodia, and improvement in financial access to services, which are driving the market growth during the forecast period. Farm mechanization helps to produce higher quality agricultural harvest and even boost production, but factors such as high maintenance costs, and reliance on traditional methods due to lack of education or money for most of the small-scale farmers are restraining the market growth during the forecast period.
- The Ministry of Agriculture, Forestry, and Fisheries (MAFF) has been working with the private sector and development partners to integrate the use of agricultural machinery into middle-class farming communities to respond to the current and future decline in the agricultural workforce. The government aims to make Cambodia a high-middle-income country by 2030 and a high-income country by 2050. At the same time, it has the ambition to modernize Cambodia's agricultural sector to be more competitive, environmentally resilient, and sustainable to increase the income of farmers' families, expand prosperity, and improve the well-being of the Cambodian people.
- The Cambodia agricultural machinery market is highly competitive with the presence of firms ranging from multi-national corporations to local machinery companies. In 2022, John Deere introduced tractors designed for work in narrow orchards and vineyards with the addition of the new 5EN and 5ML Series and it is ideal for fruit handling and hauling, spraying, mowing, and any application that takes place within the narrow confines of an orchard or vineyard.

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## Cambodia Agricultural Machinery Market Trends

### Decline in Agriculture Labor Drives the Demand for Tractors

The shortage of agricultural labor is one of the prime driving factors for the demand for combined harvesters in Cambodia. Urbanization and Industrialisation have caused the movement of rural agriculture employees to urban areas causing inadequate labor availability, especially during key agriculture operations such as sowing and harvesting. According to the World Bank, the number of people employed in the agriculture sector was 40% in 2019 which has decreased by 37% in 2022. Thus, a significant reduction in the number of employees in the agriculture sector is giving way to a rise in wage rates, thereby allowing the farmers to adopt farm mechanization. With the availability of advanced technology, coupled with the declining availability of farm labor, the farmers are shifting towards the use of machinery in agriculture, as they aid in saving time, and resources, decrease the costs, and enhance productivity.

Besides, the tractor is one of the basic and necessary farm machinery used by small, marginal, and large landholding farmers. Tractors are used for multiple field operations and make many agriculture operations easy. Due to the significant increase production in of row crops and horticultural crops, there is an increasing usage of tractors. For instance, according to FAOSTAT, cereals production in Cambodia was 11.8 million metric tons in 2020 which increased and reached 12.8 million metric tons in 2022. The growth observed in the sales of tractors is an important indicator of the advent of farm mechanization. Tractors tend to act as a source of power whereby various agricultural machines can just be attached to them. This co-dependency means the purchase of tractors, which has increased over the years.

In 2022, RMA Cambodia company inaugurated a new sales branch in the Steung Sen district of Kampong Thom province to expand the market and improve the quality of service to customers. RMA Cambodia is currently supplying tractors of John Deere brand in Cambodia from 36 hp to 370 hp. The most up-to-date product is the AutoTrac cabin tractor with 55hp to 75hp, which enables hands-free steering of the tractor by using GPS coordinates to control the tractor. The U.S. government has been working with Cambodian farmers and entrepreneurs to improve farming across all climates, increase crop yields, and create new markets.

### Rice Combine Harvesters is the Significant Segment by Product Type

Rice is Cambodia's major crop and is the most important export commodity. Rice is grown on most of the country's total cultivated land area and also makes up half of Cambodia's agricultural GDP. Still, the per-hectare rice yield in Cambodia is among the lowest in Asia. The mechanization including rice combine harvesters can directly and indirectly bridge the yield gap, by reducing the harvest and post-harvest losses. Besides, the cultivated area, the harvested area, and the production of rice for the last 10 years have been gradually increasing. For instance, according to FAOSTAT, the production of rice was 10.9 million metric tons in 2020 which increased to 11.6 million metric tons in 2022. Therefore, the rising rice crop production drives the demand for combine harvesters in the country.

Additionally, the use of combined harvesters based on a custom hiring basis has also increased in Cambodia. To maximize the use of this machine, some service providers move their harvesters around to other areas where harvesting is required for both rainy and wet season rice. Therefore, with rising market demand and increased usage of rice combine harvesters by farmers in the country, the sale of them is anticipated to show growth further during the forecast period. Although regarded as one of the poorest countries in Asia, Cambodia has experienced a surge in farm mechanization in recent years. The use of combined harvesters in Cambodian rice farming is majorly driven by the increased wage rates and labor shortages in rural Cambodia. Prey Veng, Takoe, Battambang, and Banteay Meanchey are some of the major provinces for Rice harvesters' sales in the country. For instance, according to the General Department of Agriculture, Cambodia currently has 6,796 rice harvesting machines that have been actively working on the preparation of fields, plantations and rice harvests, and machinery for horticulture and aiming to

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further increase the productivity of the sector by focusing on a shift to mechanization to replace human labor.

## Cambodia Agricultural Machinery Industry Overview

The Cambodian agricultural machinery market is consolidated due to the presence of a few prominent players, who account for more than half of the market. The key players in the market include Deere and Company, Escorts Limited, Kubota Corporation, Mahindra and Mahindra Ltd, and Yanmar Holdings Co., Ltd. The main strategy adopted by the key players has been to invest in R&D to encourage innovation and maintain a strong market base. The advent of advanced technologies like Artificial Intelligence, Robotics, Google Earth, and growing number of government initiatives have driven the demand for agricultural machinery to rise.

### Additional Benefits:

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

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