

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

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Report description:

The Europe Agricultural Machinery Market size is estimated at USD 43.34 billion in 2025, and is expected to reach USD 50.73 billion by 2030, at a CAGR of 3.20% during the forecast period (2025-2030).

Agriculture in the European Union has undergone a significant transformation from its traditionally labor-intensive model, which relied heavily on seasonal immigrant workers in member states' farm fields. The increasing shortage of skilled labor has driven a rise in mechanization across European countries, leading to increased sales of agricultural machinery in the region. World Bank data indicates that employment in agriculture in the European Union decreased from 4.32% in 2020 to 3.99% in 2022. Additional factors contributing to this trend include the reduction in arable land area and declining freshwater availability, further intensifying the demand for farm mechanization in European countries.

Tractor sales are a primary driver of growth in the European agricultural machinery market. According to National Authorities of Europe, 211,700 tractors were registered across Europe in 2023, with 158,100 of these being specifically agricultural tractors. Industry leaders are introducing new machinery equipped with advanced technologies to enhance farming efficiency and ease of operations in the region. For example, in 2022, John Deere & Co. launched an operator-less tractor for field tilling, addressing the challenge of labor shortages in the region.

Europe Agricultural Machinery Market Trends

Shortage of Skilled Labor

European agriculture has traditionally depended on seasonal immigrant workers for farm labor across various member states.

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However, rural populations are increasingly drawn to urban areas due to better job prospects, higher salaries, and improved living standards, resulting in a rapid increase in rural-to-urban migration. For example, Spain's rural population decreased from 19.4% in 2019 to 18.4% in 2023, highlighting this demographic shift. Furthermore, the demanding nature of farm work, which often involves long hours, physical labor, and exposure to weather conditions, has led to a decline in interest in agricultural careers, particularly among younger generations. This trend has exacerbated the farm labor shortage in the region, creating challenges for agricultural productivity.

According to the World Bank, agricultural employment in the European Union decreased from 4.32% in 2020 to 3.99% in 2022, underscoring the ongoing decline in the agricultural workforce. This persistent labor shortage has prompted a significant shift towards mechanization and automation in European agriculture, as farmers seek alternative solutions to maintain productivity. Tractors, a crucial component of agricultural machinery, have experienced substantial growth potential in the market due to this increased demand for mechanization. Tractors, one of the essential agricultural machinery, have witnessed enormous growth potential in the market. Farmers in the region increasingly prefer purchasing high-end tractors to work on larger fields as part of their effort to improve crop yields and boost farm efficiencies.

Germany Dominates the Market

Germany stands as a significant market for agricultural machinery and implements in Europe. The country's reputation for precision engineering and innovation has positioned it as one of the world's leading exporters of agricultural machinery. Additionally, Germany ranks among the largest manufacturers and consumers of agricultural machinery within Europe.

Tractors serve as the primary power source for agricultural machinery in Germany. AGCO Corporation holds a prominent position in the tractor market, offering brands such as Massey Ferguson and Valtra Inc. Market participants are introducing innovative equipment to promote farm mechanization. In 2022, Case IH launched the LB 424 XLD large square baler model, which produces extra-dense 120 cm x 70 cm bales with a 10% increase in density, enhancing bale quality, handling, and rotor cutting efficiency.

German farmers receive annual subsidies from the European Union for investing in modern machinery, which can be costly. These subsidies enable more efficient farm operations. However, as workers increasingly prefer non-farming sectors, the demand for agricultural machinery to perform labor-intensive tasks is rising.

Europe Agricultural Machinery Industry Overview

The agricultural machinery market in Europe is consolidated and driven primarily by the presence of many global players. Some Deutz-Fahr, John Deere, CNH Industrial, CLAAS KGaA mbH, and AGCO Corporation are some prominent players holding a major share in the agricultural machinery market in Europe. The companies operating in the market aim to strengthen their presence through product features, pricing, quality, scale of operations, and technological innovations.

Additional Benefits:

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

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