

## **Italy Tractor Market Research Report 2021-2030**

Market Report | 2025-06-03 | 99 pages | Arizton Advisory & Intelligence

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### **Report description:**

The Italy tractor market by shipments is expected to grow at a CAGR of 1.19% from 2024 to 2030.

#### Italy Tractor Market News

- In February 2025, John Deere announced major initiatives to support the ability of European and U.S. farmers to maintain and repair their equipment in the agricultural and construction sectors.
- In February 2025, AGCO Corporation and SDF (SAME, DEUTZ-FAHR) signed a supply agreement that will offer farmers a streamlined low-mid range horsepower tractor portfolio for AGCO's leading Massey Ferguson brand.
- In February 2025, the Kubota Group exhibited its technologies at CES 2025, focused on integrating automation, AI, connectivity, and sustainability.
- In April 2025, the new Fendt e100 V Vario electric tractor was presented to the Italian farmers in two-day events dedicated to the new electric tractor from Fendt.

#### IMPACT OF TARIFF

- Italy, as part of the European Union, is subject to U.S. tariffs alongside other EU countries. Specifically, the US has imposed a 20% tariff on all goods imported from the EU, including Italy.
- The U.S. government announced a temporary pause in tariff hikes, but the situation remains uncertain after 90 days, with a 10% minimum tariff in effect. This trade tension significantly impacts the manufacturer of tractors in Italy, which imports iron, aluminum, plastic, and other raw materials from different countries.
- Italy imports a significant number of electrical components, plastics, and other raw materials from the U.S. and other countries. These added costs are likely to be passed on to Italy consumers, causing a notable increase in the prices of tractors. As a result, demand for locally manufactured tractors is expected to grow.
- Italy has expressed a preference for seeking negotiated solutions with the U.S. and has not yet announced counter-tariffs on US goods in April 2025.

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## TRACTOR MARKET TRENDS

### Growing Use of Alternative Fuel in Tractors

Diesel engines have dominated agricultural machinery for years due to their efficiency. However, their environmental impact has stimulated the development of cleaner technologies. To alleviate the environmental impact, the industry is exploring various alternative fuels. In February 2025, New Holland, in adherence to its strategy of sustainable farming, launched the T6.180 Methane Power tractor. Also, for Fendt Tier 4 tractors, Ecomotive Solutions introduced a dual-fuel system in 2024 that allows biomethane to be used in addition to diesel.

### Technological Advancements in the Italy Tractor Market

- In 2024, SDF's Deutz-Fahr brand unveiled the Smart Vineyard Tractor, embodying the "Tractor as Sensor" concept.
- Antonio Carraro introduced the SR-e concept tractor, a 100% electric compact tractor featuring an electric CVT with a maximum output of 50 kW and a PTO motor delivering up to 35 kW.
- GPS-enabled tractors that enable farmers to program routes help them navigate their way across the field.
- The adoption of smart tractors with advanced technologies is transforming modern farming by enhancing efficiency, productivity, and precision.

## DRIVERS OF THE ITALY TRACTOR MARKET

### Government Policy and Credit Support System

- Approximately \$3.37 billion was stated under the CAP Plan to help roughly 800,000 farmers cope with a growing number of climatic adversities and natural disasters.
- Over \$11.2 billion of the Plan's budget is earmarked for interventions aimed at the climate and environment.
- Moreover, in 2023, Italy announced to allocation of approximately \$2.24 billion to organic farming, as it is considered a production technique contributing to the targets of the European Green Deal.

### Increased Focus on Organic Farming

The Italian government has been significantly investing in organic farming parallel to the European Union's Green Deal goals. Italy laid out USD 3.4 billion to transform 25% of the country's agricultural land to organic farming by 2027. Furthermore, in 2022, the Italian government approved new legislation establishing an "Organic Made in Italy" label as well as a national strategy to support organic production across the agricultural sector. Such factors are projected to support the Italy tractor market growth. Also, according to the figures released by the Italian government, the Italian organic market exceeded \$7.3 billion in 2024, recording an increase of 5.7% compared to 2023.

## INDUSTRY RESTRAINTS

### Agricultural Credit Crunch in Italy

- Italy's agricultural sector is witnessing an unprecedented challenge of accessing credit which is threatening farm modernization efforts and jeopardizing the future of Italian farming.
- The country is also experiencing a significant decline in its land credit. Therefore, from 2009 to 2023 the land credit severely declined by 40%.

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-□Due to a lack of essential financing, Italian farmers are struggling to invest in modern machinery and equipment, adopt precision agriculture techniques, implement sustainable farming practices, and expand operations to achieve economies of scale.

## Climate Variability on Agriculture and the Looming Water Scarcity

As per 2024 data, the southern parts of Italy, such as Sicily and Sardinia, are facing intense droughts that have devastated agriculture and livestock. According to (Istituto Nazionale di Statistica) Istat data, agricultural production fell by 1.8% in real terms in 2024, compared to 2022, while added value recorded a more marked decline of 2.5%. The decline was attributed to the adverse weather conditions. Furthermore, persistent rainfall in May 2024 delayed the transplantation of tomato plants.

## ITALY TRACTOR MARKET SEGMENTATION INSIGHTS

### INSIGHTS BY HORSEPOWER

The 50-100 HP tractor category has held the largest share of the Italy tractor market in 2024. This is because most Italian farmers operate on small landholdings, often less than 10 hectares. In Italy, tractors between 50 and 100 horsepower are primarily used for tasks on smaller farms, terraced farming, and vineyards, including general maintenance, transportation, and light tillage. Also, the 50-100 HP tractors are commonly used in large agricultural areas across Italy. These tractors are prominent in the hilly regions of Tuscany, Umbria, Marche, Piedmont, and areas of Sicily and Calabria. 50 HP- 100 HP tractors in Italy are ideal for applications in vineyards, orchards, and vegetable farms.

#### Segmentation by Horsepower

- Less Than 50 HP
- 50?100 HP
- Above 100 HP

### INSIGHTS BY DRIVE TYPE

In 2024, the 2WD segment captured the largest Italy tractor market share. As farmers shift towards more private farming, mechanization needs are becoming more sophisticated. In Italy, 2WD (two-wheel drive) tractors are more prominent in regions with flat or gently rolling terrain, where high traction is not vital. The Po Valley (Pianura Padana) region in Italy has a large fertile plain which is ideal for intensive agriculture, and the 2WD tractors are widely utilized here. Also, the growing small-scale farming in Italy is expected to gain traction for 2WD tractors as these tractors are cost-efficient and flexible for small spaces.

#### Segmentation by Drive Type

- 2 Wheel Drive
- 4 Wheel Drive

## GEOGRAPHICAL ANALYSIS

The Italy tractor market in the North witnessed the largest shipments in 2024, accounting for over 47% in 2024. In the Northern region, Lombardy led the tractors market with total sales in 2024. Furthermore, the Southern region is recorded as the fastest-growing region of Italy. In the Southern region, Molise experienced substantial growth. Molise's agricultural landscape is characterized by small-scale farms and cooperatives, with a significant portion of businesses operating as micro or small enterprises.

The Central Italy tractors market witnessed shipments of 2.9 thousand units in 2024. Central Italy encompasses the Tuscany, Umbria, Lazio, Marche, and Abruzzo regions. Tuscany is one of the primary wine-producing regions. The Island region in Italy's

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tractor market shipments is expected to reach 1.7 thousand units by 2030. Italy's island region comprises Sicily and Sardinia. Sicily is the main producer of citrus, olives, and grapes, while Sardinia specializes in wheat and barley cultivation.

#### Segmentation by Geography

- Italy
- o□North
- o□South
- o□Central
- o□Islands

#### ITALY TRACTOR MARKET VENDOR LANDSCAPE

CNH Industrial N.V., SDF Group, AGCO Corporation, AGRO Tractors, Kubota Corporation, and Deere & Company led the Italy tractor market. These companies have strong market share and offer diverse sets of agricultural tractors in the Italian market. Furthermore, Antonio Carraro, BCS Group, CLAAS KGaA mbH, Goldoni Keestrack, YANMAR HOLDINGS CO., LTD., and TAFE are other prominent vendors in the Italy tractor market.

CNH Industrial N.V., SDF Group, and AGCO Corporation have emerged as the undisputed leaders, collectively capturing over significant market share in 2024. Their long-standing presence has given them the advantage of understanding local farming needs, seasonal cycles, and customer behavior better than new entrants. Book a free live call now to get in-depth insights into the exact market share of the leading vendors in the Italian tractor market.

Farmers in the Italian tractor market are increasingly adopting GPS-guided tractors equipped with IoT sensors, enabling real-time monitoring of soil conditions and optimizing the application of water, fertilizers, and pesticides. This shift enhances efficiency and reduces environmental impact. Furthermore, in February 2025, AGCO signed a supply agreement where Massey Ferguson tractors will be built by SDF. The partnership aims for SDF to produce low to mid-horsepower Massey Ferguson tractors, up to 85 horsepower, for several global markets beginning in mid-2025.

#### Key Company Profiles

- CNH Industrial N.V.
- Deere & Company
- AGCO Corporation
- Kubota Corporation
- SDF Group
- TAFE

#### Other Prominent Company Profiles

- YANMAR HOLDINGS CO., LTD.
- CLAAS KGaA mbH
- Antonio Carraro
- BCS S.p.A.
- Goldoni Keestrack srl
- Argo Tractors S.p.A.

#### KEY QUESTIONS ANSWERED:

- 1.□How big is the Italy tractor market?

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2. □What is the growth rate of the Italy tractor market?
3. □What are the significant trends in the Italy tractor market?
4. □Who are the key players in the Italy tractor market?
5. □Which region dominates the Italy tractor market share?

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