

India Combine Harvester Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

Market Report | 2025-06-28 | 139 pages | EMR Inc.

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Report description:

The India combine harvester market was valued at USD 246.40 Million in 2024. The industry is expected to grow at a CAGR of 5.40% during the forecast period of 2025-2034. The increased awareness of climate-resilient farming and the increasing adoption of efficient management practices have resulted in the demand for harvesting equipment including combine harvesters. These help in reducing post-harvest losses besides augmenting productivity under unpredictable weather conditions. In turn, all these factors have resulted in the market attaining a valuation of USD 416.91 Million by 2034.

India Combine Harvester Market Report Summary

Description

Value

Base Year

USD Million

2024

Historical Period

USD Million

2018-2024

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Forecast Period

USD Million

2025-2034

Market Size 2024

USD Million

246.40

Market Size 2034

USD Million

416.91

CAGR 2018-2024

Percentage

XX%

CAGR 2025-2034

Percentage

5.40%

CAGR 2025-2034 - Market by Region

North India

5.8%

CAGR 2025-2034 - Market by Region

South India

5.4%

CAGR 2025-2034 - Market by Type

Self-Propelled

6.9%

2024 Market Share by Region

North India

32.4%

India Combine Harvester Market Overview

The India combine harvester market growth is primarily influenced by a shift towards the modernization of agriculture and increasing crop yields. Other fast-driving forces include increasing food demand, better rural infrastructure, and advancement in farm machinery technology. Trends such as precision agriculture, GPS-enabled harvesters, and custom hiring centers are changing the entire market landscape. With increasing harvester adoption among medium-scale farmers and contract farming ventures, the market scope is widening. Investment in localization, after-sales service networks, and product innovation are some of the key strategic efforts executed by key players seeking a competitive edge. Further efforts to cement their footing in this fragmented but high-potential market are strategic cooperation and expansion to underserved regions.

India Combine Harvester Market Growth

Two prime niches driving heavy demand in the India combine harvester market are horticultural crop harvesting and export-oriented contract farming. As the country progresses diversifying into high-value horticultural crops such as corn, sunflower, and pulses, the demand for specialized harvesters that can effectively harvest such delicate yields is increasing. On the other hand, the contract farming maintenance for exports, especially for basmati rice and maize, calls for on-time and precision harvesting to achieve the expected quality standards set by international customers. Companies serving these niches with specific crop attachments and high-performance harvesters are thus tapping on fast-growing premium segments. These niches also attract private investment to offer higher profit margins and drive product innovation specific to crop requirements.

Key Trends and Recent Developments

The key trends of the India combine harvester market include the evolution of multi-crop combine harvesters, expansion of Custom Hiring Centers (CHCs), integration of smart and precision technology, and the local components and indigenous manufacturing.

February 2025

Kubota unveiled its latest combine harvester, the Pro 588i-G, on the second day of the Krishi Darshan Expo 2025 in Hisar. This new harvester is intended to simplify and improve the harvesting process for farmers. It is ideally suited for wheat and paddy crops, making it a viable option in many agricultural areas.

January 2025

Yanmar Holdings Co., Ltd. finalized the acquisition of CLAAS India Private Limited through its group business, Yanmar Coromandel Agrisolutions Private Limited, and has renamed the company Yanmar Agricultural Machinery India Private Limited (YAMIN), effective November 20, 2024.

July 2022

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Mahindra & Mahindra increased its holding in its Finland-based affiliate Sampo Rosenlew Oy to 100% with the acquisition of residual shares for more than Rs 35 crore. Mahindra & Mahindra signed an option exercise share purchase agreement to acquire 1,317 equity shares of Sampo Rosenlew Oy in exchange for the exercise of a call option held by Sampo's another shareholder.

September 2021

Swaraj launched the new Swaraj Pro Combine 7060 that provides paddy farmers in West Bengal with increased productivity, performance, and convenience of operation, as well as maximum potential grain output for best-in-class acreage. The new Swaraj Pro Combine 7060, equipped with a redesigned paddy cutter bar, can also chop sleeping crops efficiently and consistently at a lesser cost.

Evolution of Multi-Crop Combine Harvesters

The growing popularity among farmers for multi-crop combine harvesters that can be used for harvesting the four major crops such as wheat, paddy, maize, and soybean, has significantly propelled the India combine harvester market dynamics. The motive behind multi-crop breeds in the country's agri-machinery sector is due to optimized operational cost as the key factor in enhancing ROI. Companies like Preet and Mahindra are developing Swiss-knife styled harvesters for multi-crop scenarios that lend heavily towards medium as well as large farms in the market. Such combinations improve productivity.

Expansion of Custom Hiring Centers (CHCs)

The government-favored import avenue for CHCs under programs like SMAM has given access to expensive modal-pack farm assemblage for small and marginal farmers to rent combine harvesters. This way, mechanization provides the benefit of substantial coverage beyond current input, boosting the overall demand in the India combine harvester market. For instance, TAFE and John Deere have joined with CHCs to rent out harvesters across the rural belt. This model boosts the scalability of OEMs and promotes a sound rural economy, especially in areas with scattered discrepancies of land employment.

Integration of Smart and Precision Technology

The India combine harvester market observes a growing preference for harvesters that are fitted with GPS technology, IoT sensors, and telematics for real-time locus monitoring, yield mapping, and remote diagnostics. The high-tech equipment and systems contribute to better productivity. Brands like New Holland and CLAAS have taken the initiative of creating precision models specifically for India. For instance, with CROP TIGER, CLAAS harvesters mean yield measurement and geo-tracking. These are important elements for data-driven decision-making. They enable optimized fuel usage which are important parameters for larger farms and agri-enterprises looking for seamless growth.

Local Components and Indigenous Manufacturing

Efforts are underway to promote local assembly and R&D to cut import dependence and bring down costs. Companies like Kartar Agro and Dashmesh are localizing the manufacture of some low-cost farm machines, boosting the India combine harvester market revenue. The 'Make in India Program' by the government has helped this trend speed up. As a result of this support, companies like Kubota aim at designing machines for the myriads of Indian crops and contours and provide extended local employment and support for the ancillary industry.

India Combine Harvester Market Trends

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The most significant drivers for the India combine harvester market revenue growth are the increasing shift towards commercial farming and the rising accessibility to rural credit. As agriculture proved to be profitable, especially with cash crops and commercial-scale grain farming, the demand for effective, timesaving means of harvesting increased. Moreover, with greater rural credit availability in the form of Kisan Credit Cards and agri-fintech platforms, farmers have increasingly been able to afford high-value machinery like combine harvesters. These financial tools lower entry barriers, thus motivating technology adoption, consequently driving steady growth in both developed and emerging agricultural zones.

India Combine Harvester Market Opportunities

Companies can find ample opportunities in the India combine harvesters in terms of expansion into Eastern and Northeastern states and developing compact harvesters for small farms. West Bengal and other areas, like Assam and Orissa, are relatively underpenetrated owing to their terrain conditions and owning small landholdings. This gives companies an opportunity to tap these markets by developing lightweight, terrain-adaptive models. Besides, small-scale and low-cost harvesters for small, dispersed farms are the newest technology that small farmers are keen to embrace. Such locally created solutions backed by mobile technology can enable companies to make a strong impact in rapidly growing rural markets with complicated and dispersed farming communities.

India Combine Harvester Market Restraints

- The large upfront investments in adopting harvesters remain a constraint which deters small and marginal farmers from owning these machines even though financing options are available. Hence, this factor poses a serious challenge to the India combine harvester market growth.
- The technical knowledge and training on the use and maintenance of advanced machinery in rural areas make adoption and optimal use of combine harvesters another key concern.

India Combine Harvester Industry Segmentation

The EMR's report titled "India Combine Harvester Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Type

- Self-Propelled
- Tractor-Pulled Combine
- PTO-Powered Combine

Market Breakup by Region

- North India
- East India
- South India
- West India

India Combine Harvester Market Share

Market Insights by Type

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Self-propelled are creating a major impact in India combine harvester industry, particularly in the bigger farming states of Punjab and Haryana, where they are typically favored because of their high efficiency, high speeds, and specific appropriateness for crops such as wheat and paddy. The market observes an increasing number of farmers with fragmented landholding areas are favoring tractor-pulled combines due to their affordable advantages. Meanwhile, PTO-powered combine harvesters are gaining momentum in hilly and remote terrains such as the Northeast, which require compact and lightweight machines. Each of these serves unique regional and operational needs, allowing manufacturers to diversify offerings and tap into India's diversified agricultural landscape.

India Combine Harvester Market Regional Analysis

CAGR 2025-2034 - Market by

Region

North India

5.8%

South India

5.4%

East India

XX%

West India

XX%

North India Combine Harvester Market Opportunities

The North India combine harvester market growth is boosted by states like Punjab, Haryana, and Uttar Pradesh with their vast wheat and paddy fields. Combine harvesters reduce labor costs and are extremely beneficial in enhancing the efficiency of harvesting. The region has a huge irrigation system and is largely supported by government subsidies, which favor the concept of sophisticated harvesting technology.

East India Combine Harvester Market Insights

States in East India like West Bengal, Odisha, Bihar are seeing rising demand for combine harvesters fueled by rice and maize cultivation. Although the adoption speed is lower than North India, the Indian government's focus on agricultural mechanization, is expected to generate interest. Localized, compact, and cheap machines are expected to be preferable in East India due to fragmented landholdings and rugged terrain in the region.

South India Combine Harvester Market Growth

In South India, particularly in Tamil Nadu, Karnataka, and Andhra Pradesh, the combine harvester adoption is increasing due to

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heavy production of rice, maize, and sugarcane. Farmers are increasingly shifting towards mechanized harvesting to enhance productivity and minimize post-harvest losses. In addition, contract farming and farm cooperatives that are increasingly being observed in this region require multi-crop harvesting solutions that are efficient and highly flexible, to suit the variety of crops being cultivated in South India.

West India Combine Harvester Market Outlook

Demand in the West India combine harvester market is accelerated by Maharashtra, Gujarat, and Rajasthan. These states indicate a high adoption rate as wheat, cotton, and soybean are cultivated on a large scale. Factors that further shape the demand are changing farming practices with government initiatives being established in the mechanization programs and access to finance through rural credit schemes. Extensive landholdings coupled with the great dependence on appropriate harvesting techniques have boosted the demand for high-capacity and durable harvesters.

Competitive Landscape

The India combine harvester market players are emphasizing localization, cost-effectiveness, and advanced features like telematics coupled with multi-crop capabilities. Most of the India combine harvester companies are strengthening their after-sales-service networks and exploring regional partnerships to increase their share in the market by positioning the products for different farm sizes and terrains as well as the demand for mechanized precision agriculture.

Claas KGaA GmbH

Founded in 1913 and based in Germany, Claas is a leading company in the worldwide agricultural machinery sector. The company has introduced forward technology combine harvesters including LEXION. These are particularly developed for multifaceted agricultural preciseness and efficiency in India.

Mahindra & Mahindra Ltd

Founded in 1945 with its headquarters located in Ludhiana, Punjab, Mahindra is the largest name in India's agri-equipment market, manufacturing cost-effective, multi-functional combine harvesters. The company is widely known for developing low-cost mechanization on medium and small farms for enhancing productivity on the rich diversity of the country's agriculture.

Kubota Corporation

Established in Japan, in the year 1890, Kubota Corporation is known for developing tough and effective combine harvester models that are specific to Indian conditions. The company aims at revolutionizing the industry with freer technologies like GPS in farming improvement and mechanization in India.

Deere & Company

Founded in the United States in 1837, Deere & Company provides cutting-edge combine harvesters in India, for efficient harvesting of diversified crops. The products are fitted with features like GPS and data analysis, especially tailored to large-scale and contract farming with the aim of boosting operational efficiency and maximizing yields.

Other key players in the India combine harvester market report are Yanmar Co. Ltd, AGCO Corporation, Iseki & Co. Ltd, CNH Industrial NV, Preet Group, and SAME Deutz-Fahr S.p.A., among others.

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