

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

Market Report | 2025-06-28 | 123 pages | EMR Inc.

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**Report description:**

The Philippines combine harvester market, valued at USD 144.84 Million in 2024, has experienced significant growth, drastically cutting down the time and labour needed for crop harvesting, enabling quicker and more efficient processes than traditional methods. With a forecasted CAGR of 3.40% from 2025 to 2034, the market is set to reach USD 202.35 Million by 2034. Modern combine harvesters are designed to maximise fuel efficiency, resulting in cost savings and enhancing their economic feasibility for farmers.

Philippines 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

144.84

Market Size 2034

USD Million

202.35

CAGR 2018-2024

Percentage

XX%

CAGR 2025-2034

Percentage

3.40%

CAGR 2025-2034 - Market by Type

Self-Propelled

4.1%

Philippines Combine Harvester Market Overview

Combine harvesters boost productivity by saving time and labour, reducing costs, and ensuring consistent, high-quality harvests with minimal crop loss. This results in increased yields and profitability, influencing the combine harvester industry revenue. Their versatility across crops like rice, wheat, and corn suited large-scale farming operations effectively. In November 2024, farmers in Davao Oriental received PH40 million worth of modern agricultural machinery through the Rice Competitiveness Enhancement Fund Mechanization Program. The equipment aimed to improve rice production and farmer competitiveness. Governor Nino Uy highlighted the importance of sustaining government interventions to ensure long-term agricultural development.

Philippines Combine Harvester Market Growth

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Combine harvesters improve safety by automating farming tasks, reducing farmers' exposure to harsh conditions and reliance on seasonal labour. They enhance grain precision, fuel efficiency, and land use, supporting sustainable farming. These advantages shape the Philippines combine harvester market dynamics and trends. In March 2023, the Philippines Centre for Postharvest Development and Mechanization (PhilMech) distributed P126.2 million worth of machinery to 47 farmers' cooperatives and associations in Zamboanga del Sur. The 72 units, including rice harvesters and mobile mills, aimed to enhance agricultural productivity and improve farmers' livelihoods, with support from local officials.

#### Key Trends and Recent Developments

The Philippines combine harvester market is experiencing growth due to advancements in technology and automation, sustainable and fuel-efficient equipment, government support and incentives, and adoption of multi-crop combine harvesters.

#### December 2024

The Philippines Centre for Postharvest Development and Mechanization (PhilMech) distributed 49 farm machinery units worth PHP59.6 million to 20 farmers' associations in Agusan del Norte. This initiative, part of the Rice Competitiveness Enhancement Fund, aimed to enhance rice productivity and competitiveness, benefiting local farmers with modern equipment.

#### September 2023

Seventeen new combine harvester-thresher units were supplied to farmers' associations in Negros Oriental. These machines, which were funded by the province's supplementary budget, were designed to harvest rice and corn more efficiently, aiming to reduce waste and increase farmers' income through improved harvesting and threshing processes.

#### September 2023

The Department of Agriculture (DA) - Philmech, working together with the Cantilan local government, contributed agricultural machinery worth P3.26 million to the Cabas-an Farmers Irrigators' Association in Surigao del Sur. The donation featured a rice combine harvester, a mechanical rice transplanter, and a hand tractor, all designed to enhance farmers' productivity and income.

#### February 2023

KOICA and FAO delivered farm machinery valued at PHP 12 million to five farming organisations in Kabacan, Cotabato. The equipment, which included rice mills, combine harvesters, and tractors, benefited 942 farmers. The initiative aimed to boost farm mechanisation, increase productivity, and promote sustainable development in the area.

#### Technological Advancements and Automation

The agricultural market is embracing technological advancements, with automation and smart features becoming key trends. Modern combine harvesters incorporate GPS, sensors, and data analytics, improving efficiency and accuracy. In August 2022, the Philippine Rice Research Institute developed a cost-effective, four-in-one Rice Combine Harvester, funded by DOST-PCAARRD. Priced at P750,000, it addresses post-harvest losses, labour shortages, and boosts productivity. These innovations enhance resource management, reduce human errors, and enable farmers to cover larger areas faster, resulting in higher-quality yields and contributing to the growth of the Philippines combine harvester market.

#### Growing Demand for Sustainable and Fuel-Efficient Machines

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In the Philippines, the demand for sustainable, fuel-efficient combine harvesters increased due to rising fuel prices. Modern harvesters focus on fuel efficiency, offering cost savings and reducing environmental impact, boosting the demand for the Philippines combine harvester market. This shift aligned with sustainable farming practices. In June 2021, IRRI and DA BAFE launched the EasyLevel and EasyFarm apps to help farmers access machinery and optimise scheduling. These apps connected farmers with local resources, improving efficiency and productivity in rice production through smart technology and better scheduling.

#### Increase in Government Support and Incentives

The Philippine government's increasing support for agriculture, through subsidies and financial incentives, is driving the growth of the combine harvester market. Initiatives aimed at modernising farming and boosting productivity are motivating farmers to invest in advanced machinery. These efforts address labour shortages, enhance efficiency, and improve agricultural output, impacting the Philippines combine harvester market revenue. Financial assistance is making these machines more accessible to small and medium-sized farmers, further accelerating market expansion. In March 2022, tariff and tax exemptions were extended through the CREATE and AFMA laws to support agricultural input imports.

#### Rising Adoption of Multi-Crop Combine Harvesters

The Philippines is seeing a rise in the adoption of multi-crop combine harvesters, which can efficiently harvest rice, corn, and wheat. This versatility allows farmers to make the most of their investments by reducing the need for multiple machines. As demand for cost-effective farming solutions grows, the market for multi-crop harvesters contributes to the overall Philippines combine harvester market expansion. The 88HP Farm Equipment Rice Combine Harvester, priced between USD 13,100 and USD 14,500, is designed for various crops, with a 130l fuel tank and advanced hydraulic control for enhanced efficiency.

#### Philippines Combine Harvester Market Trends

Manufacturers are developing combine harvesters designed for the needs of the Philippines agriculture, focusing on small-scale farms and a variety of crops like rice and corn. Heightened rural infrastructure, including improved roads and storage, is making modern machinery more accessible, fostering opportunities in the Philippines combine harvester market. Financial support, including government aid and microloans, is also helping alleviate the financial burden of purchasing harvesters. President Marcos Jr. launched the Agri-Puhunan at Pantawid Program (APP) in April 2025 to provide financial and technical support to rice farmers. Under this initiative, farmers can access loans up to P60,000 at 2% interest, alongside a monthly allowance. The program also provided farm machinery worth P6.5 million to cooperatives. APP aims to improve productivity and profitability in farming, supported by various government agencies and financial institutions.

#### Philippines Combine Harvester Market Opportunities

The Philippines combine harvester market grows as agricultural mechanisation increases, supported by government initiatives such as the Rice Competitiveness Enhancement Fund (RCEF). Better rural infrastructure and affordable compact models benefit small farms. Rising demand for high-yield crops like rice and corn further fuels the need for efficient harvesting, boosting productivity and reducing losses. In December 2024, President Marcos Jr. signed Republic Act No. 12078, amending the Rice Tariffication Law. The extension prolongs the Rice Competitiveness Enhancement Fund (RCEF) until 2031, increasing its annual budget from ₱10 billion to ₱30 billion. This fund supports seed production, farm mechanisation, and training programmes to boost the rice sector's competitiveness.

#### Philippines Combine Harvester Market Restraints

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? The steep cost of combine harvesters puts them out of reach for many small-scale farmers, hampering improvements in agricultural efficiency. This economic constraint delays the wider adoption of mechanisation, thereby restricting potential productivity growth within the Philippine farming sector.

? The lack of trained technicians and spare parts affects the maintenance of combine harvesters. Without proper technical support, farmers experience operational inefficiencies and costly breakdowns, making it harder to use modern machinery effectively.

### Philippines Combine Harvester Industry Segmentation

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

#### Market by Type

? Self-Propelled

? Tractor-Pulled Combine

? PTO-Powered Combine

CAGR 2025-2034 - Market by

Type

Self-Propelled

4.1%

Tractor-Pulled Combine

XX%

PTO-Powered Combine

XX%

#### Philippines Combine Harvester Market Share

##### Market Analysis by Type

According to the Philippines combine harvester market analysis, self-propelled machines provide greater efficiency, lower labour costs, and better grain quality. These harvesters are well-suited to the country's agricultural needs, enhancing productivity and fuel efficiency. They also provide flexibility for both large and small-scale operations. The FMWORLD Multi-Crop Harvester, with advanced threshing features, and the Jumil Corn Combine Harvester, processing 30-40 bags per hour. Ford Tractor offers a variety of harvesters with after-sales support and affordable spare parts in the Philippines.

Tractor-pulled combines in the Philippines offer flexibility and cost-efficiency, making them ideal for small to medium-sized farms. These machines provide effective harvesting with minimal fuel consumption, driving market demand. In 2024, the Philippines ranked 9th among U.S. agricultural export markets, with a total export value of USD 3.5 billion, reflecting a 3.6% growth from

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2015 to 2024. The expanding agricultural trade highlights the increasing need for high-quality harvesting equipment, further boosting the market for tractor-pulled combine harvesters in the region.

PTO-powered combines in the Philippines offer efficient power transmission via the tractor's PTO system, driving demand in the combine harvester market. They are user-friendly, low-maintenance, and provide reliable performance in various agricultural conditions, boosting productivity. PHilMech, part of the Department of Agriculture, provides a range of technologies for land preparation, crop establishment, harvesting, threshing, grain drying, and rice milling. Their RCEF Mechanization Program aims to enhance farming efficiency through advanced equipment, including PTO-driven disc plows and rotavators, improving agricultural output.

### Competitive Landscape

The Philippines combine harvester market key players are renowned for their innovative solutions in farming technology and equipment, particularly in combine harvesters, forage harvesters, and tractors. These companies produce a diverse range of products, such as tractors, agricultural machinery, and vehicles, with a strong emphasis on sustainability and rural development.

#### Claas KGaA GmbH

Claas KGaA GmbH, founded in 1913, is a German company specialising in agricultural machinery. Based in Harsewinkel, Germany, it is well-known for its range of combine harvesters, forage harvesters, and tractors, offering innovative solutions that enhance agricultural productivity worldwide.

#### Mahindra & Mahindra Ltd

Mahindra & Mahindra Ltd, established in 1945, is an Indian multinational corporation based in Mumbai, India. The company produces a diverse range of products, such as tractors, SUVs, and agricultural machinery, with a strong emphasis on sustainability and promoting rural development.

#### Kubota Corporation

Kubota Corporation, founded in 1890 and based in Osaka, Japan, specialises in the production of agricultural machinery, construction equipment, and engines. The company plays a significant role in the global advancement of farming mechanisation and infrastructure development.

#### Deere & Company

Founded in 1837 and headquartered in Illinois, United States, Deere & Company is a prominent manufacturer of agricultural, forestry, and construction machinery. It is widely recognised for its John Deere brand and its contributions to innovation in farming technology and equipment.

Other key players in the Philippines 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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