

United States Combine Harvester Market Size Analysis - Market Share, Forecast Trends and Outlook Report (2025-2034)

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Report description:

The United States combine harvester market size reached around USD 14.15 Billion in 2024. The market is projected to grow at a CAGR of 3.30% between 2025 and 2034 to reach nearly USD 19.58 Billion by 2034.

United States Combine Harvester Market Growth

The primary crops cultivated in the United States include maize, soybean, wheat, and rice, which collectively represent 87% of the nation's total crop acreage. The United States also stands as one of the foremost producers and exporters of these commodities. Also, over the past decade (2013-2022), the country contributed 27%, 32%, and 6% to global annual production of maize, soybean, and wheat, respectively. The rising production levels of varied crops in the USA creates a demand for efficient harvesters in agricultural operations, boosting United States combine harvester market value.

Although the area dedicated to rice cultivation and its production levels are relatively modest compared to those in Asian nations, the United States remains a significant exporter of this crop. Simultaneously, in the year 2023, corn for grain production was projected to reach a record high of nearly 15.3 billion bushels, reflecting a 12% increase from the prior year's estimate. Total grain production for 2023 reached around 318 million bushels, marking a 69% rise from 2022. This in turn has driven growth of the United States combine harvester market.

In terms of agriculture land, the planted area for 2023 was estimated at 7.20 million acres, an increase of 14% from the prior year, while the area harvested for grain was projected at 6.12 million acres, up 34% from 2022. These statistics demonstrates that the increasing demand for combine harvesters in the United States is closely associated with the rise in crop production, driven by a growing global population and the necessity for enhanced food output. As agricultural operations expand and intensify, the need for efficient harvesting solutions becomes paramount. Combine harvesters facilitate the harvesting process by combining reaping, threshing, and winnowing into a single operation, thereby significantly lowering the need for manual labour.

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Key Trends and Developments

Rising demand for food production, innovations in agricultural machinery, and workforce shortage in the agriculture sector are factors fuelling United States combine harvester market growth

July 2024

Case IH, a Wisconsin-based manufacturer in the United States introduced its latest model of combine harvester. The AF11 combine harvester boasts two significant enhancements including increased grain capacity and an accelerated dumping speed.

July 2024

CLAAS introduced the LEXION 8900 TERRA TRAC in North America. It offers the utmost horsepower in its extensive range, reaching a peak of 779 horsepower (SAE) from a highly efficient 16.2L MAN engine that features Dynamic power, representing an increase of 89 horsepower compared to the LEXION 8800 model.

Feb 2024

John Deere, a leading American firm known for its expertise in manufacturing agricultural machinery, heavy equipment, and forestry machinery introduced the new S7 Series of combines. Such introductions in the United States combine harvester market help improve operational efficiency, elevate the quality of the yield, and provide comfort to the operator.

Expanding Agricultural Land and Rising Trend of Mechanisation

The trend towards larger farm sizes and consolidation necessitates the use of advanced and efficient machinery. Combine harvesters are particularly suited for expansive agricultural operations, as they enable rapid coverage of extensive fields, thereby becoming indispensable in contemporary mechanised farming practices.

Escalating Demand for Food Production

As the population of the United States continues to expand, there is an increasing necessity for effective food production methods. Combine harvesters play a crucial role in large-scale agriculture by integrating the processes of reaping, threshing, and winnowing, thereby enhancing productivity and fulfilling food supply requirements.

Workforce Shortages in Agriculture

The agriculture sector is facing significant labour shortages, leading farmers to implement mechanised solutions such as combine harvesters. These machines reduce the dependence on manual labour, boost efficiency, and lower operational expenses. To cater to this issue, key players are launching latest harvester models, leading to United States combine harvester market development.

Innovations in Agricultural Machinery

Contemporary combine harvesters are being outfitted with sophisticated technologies, including GPS, automated steering, and data analytics, which facilitate precision farming. These advancements enhance the accuracy of harvests, minimise waste, and elevate overall productivity, rendering combine harvesters increasingly attractive to farmers.

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United States Combine Harvester Market Trends

Combine harvesters are progressively being outfitted with sophisticated automation technologies, including GPS navigation, yield mapping, and automated adjustments. This development fosters precision agriculture, allowing farmers to enhance harvesting efficiency, minimise crop loss, and elevate yield quality.

Moreover, as per the United States combine harvester market analysis, as agricultural land expands, there is a growing need for high capacity harvesters that can efficiently manage extensive areas. Recent introductions of harvesters have larger grain tanks, quicker unloading mechanisms, and improved fuel efficiency, enabling farmers to complete harvesting tasks more swiftly. This capability is crucial for satisfying the rising demands of agricultural production, especially in large-scale farming operations. Contemporary combines are also being designed with improved operator comfort and safety features, including upgraded cabs that offer enhanced visibility, advanced climate control systems, and ergonomic controls. Manufacturers are prioritising these enhancements to alleviate operator fatigue and boost productivity during prolonged harvesting sessions.

United States Combine Harvester Industry Segmentation

The EMR's report titled "United States 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 Type of Movement:

- Wheel Type
- Crawler Type

Market Breakup by Region:

- New England
- Mideast
- Great Lakes
- Plains
- Southeast
- Southwest
- Rocky Mountain
- Far West

United States Combine Harvester Market Share

Based on type, the market is segmented into self-propelled, tractor-pulled combine, and PTO-powered combine harvesters. Over the forecast period, the self-propelled segment is expected to grow at a CAGR of 3.6% as it is a versatile agricultural machine that integrates three critical harvesting functions including reaping, threshing, and winnowing. Engineered for optimal efficiency, it features an internal power source, thereby negating the requirement for external tractors and improving both manoeuvrability

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and productivity.

Leading Companies in the United States Combine Harvester Market

Major players are focusing on the manufacturing of energy-efficient and technologically equipped combine harvesters to gain a competitive edge in the United States combine harvester market share.

Kubota Corporation

Kubota Corporation, established in 1890 and based in Osaka, Japan, is dedicated to the production of agricultural and construction machinery, such as tractors and combines. The company emphasises the provision of robust and efficient solutions aimed at enhancing farming practices and infrastructure development on a global scale.

Yanmar Holdings Co., Ltd.

Yanmar Holdings Co., Ltd., founded in 1912 and located in Osaka, Japan, stands as a prominent figure in the agricultural and marine machinery sectors. The company is particularly recognised for its cutting-edge diesel engines and equipment, which significantly improve agricultural efficiency and foster sustainable practices across multiple sectors.

CNH Industrial N.V.

CNH Industrial N.V., formed in 2013 through a merger and headquartered in London, United Kingdom, is a leading entity in the agricultural and construction equipment market. As per the United States combine harvester market analysis, it encompasses well-known brands such as Case IH and New Holland, providing a wide array of machinery tailored for both agricultural and industrial uses.

Deere & Company

Deere & Company, commonly referred to as John Deere, was founded in 1837 and is headquartered in Illinois, United States. The company is a key player in the manufacturing of agricultural and construction machinery, offering state-of-the-art, technology-enhanced equipment for various sectors, including farming, forestry, and turf management globally.

Other key players in the United States combine harvester market are Iseki & Co., Ltd., AGCO Corp., CLAAS KGaA mbH, SDF Group, among others.

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