

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

Market Report | 2025-06-28 | 161 pages | EMR Inc.

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Report description:

The North America combine harvester market reached around USD 15.52 Billion in 2024. The market is projected to grow at a CAGR of 3.40% between 2025 and 2034 to reach nearly USD 21.68 Billion by 2034.

North America Combine Harvester Market Growth

In 2021, the average size of farms in the United States was recorded at 445 acres, a slight increase from 444 acres in the prior year. By 2022, the nation boasted over 1.9 million farms, which collectively utilised 880.1 million acres of land, representing 39% of the total land area in the U.S. Texas holds the position of having the largest share of agricultural land in the country, comprising 14.07% of the total farmland, equivalent to 126 million acres.

The adoption of combine harvesters has significantly increased, driven by the growth in farm sizes and heightened agricultural activities. These machines are adept at efficiently harvesting a variety of crops, thereby lowering labour costs and saving time. Their adaptability and high efficiency meet the demands of contemporary agriculture, allowing farmers to operate larger fields with increased convenience.

Employment in U.S. agriculture has experienced a significant decrease of 35% since 1969. Furthermore, the total number of agricultural workers is anticipated to decline by 2% from 2023 to 2033 in the United States. □The growing adoption of combine harvesters is largely a response to the labour shortage faced by farms. These sophisticated machines automate the harvesting process, thereby lessening the dependence on manual labour and alleviating workforce issues. By enhancing efficiency and reducing labour requirements, combine harvesters enable farmers to cultivate larger areas and ensure prompt harvesting of crops, even in the context of a shrinking labour pool.

Key Trends and Developments

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Increasing farm sizes, adoption of cutting-edge technologies, improvement of rural infrastructure, and shortage of labour in the agricultural sector are the major trends impacting the North America combine harvester market expansion

February 2024

John Deere, a prominent American company specialising in the production of agricultural machinery, heavy equipment, and forestry machinery, unveiled the new S7 Series of combines. This range of harvesters is engineered to enhance efficiency, improve harvest quality, and prioritise operator comfort.

February 2024

New Holland, a leading global manufacturer of a comprehensive range of agricultural machinery, introduced its latest CR11 combine across North America. The CR11 combine offers markedly enhanced productivity, achieving nearly zero grain loss, increased throughput, and greater automation, all contributing to a reduction in the overall cost of harvesting.

February 2024

Case IH, a manufacturer based in Wisconsin, unveiled its newest model of combine harvester. The AF11 combine harvester features two notable improvements including enhanced grain capacity and a faster dumping speed.

Increasing farm size and scale

The increasing size of farms and agricultural enterprises is fuelling the demand for combine harvesters that offer high capacity and efficiency. As agricultural operations expand, the necessity for machinery capable of managing larger harvest volumes effectively becomes more pronounced.

Adoption of advanced technologies

The incorporation of cutting-edge technologies, including precision agriculture, automation, and data analytics, significantly enhances the efficiency and productivity of combine harvesters. Modern features such as GPS guidance systems, yield mapping, and automated configurations render these advanced combines increasingly attractive to farmers.

Rising demand for enhanced agricultural productivity

The demand for enhanced agricultural productivity and yield necessitates the development of sophisticated harvesting machinery. Advanced combine harvesters with superior features enable farmers to attain improved outcomes and satisfy the rising food requirements.

Rural development and infrastructure improvements

The enhancement of rural infrastructure and development is crucial for increasing the accessibility and efficiency of agricultural operations, particularly through the integration of modern combine harvesters. Improved rural infrastructure, such as well-maintained roads, reliable electricity supply, and efficient irrigation systems, plays a vital role in facilitating the movement of agricultural machinery and produce.

Growing shortage of labour

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The shortage of skilled labour in the agricultural sector has become a significant challenge for farmers and agricultural businesses. This scarcity of qualified workers can be attributed to various factors, including an ageing workforce, urban migration, and the declining interest of younger generations in pursuing careers in agriculture, consequently leading to the demand for modern agricultural machinery, including combine harvesters.

North America Combine Harvester Market Trends

The market for combine harvesters in North America is being driven by the growing adoption of advanced precision agriculture technologies. Sophisticated systems such as GPS and real-time data analytics are improving harvesting efficiency and crop management, enabling farmers to maximise yields and minimise waste, indicative of a transition towards more data-centric agricultural practices.

Additionally, there is an increasing inclination towards automation in combine harvesters, with a rising number of models equipped with automated controls and autonomous driving features. This development responds to labour shortages, enhances operational efficiency, and diminishes human error, thereby rendering contemporary harvesting operations more efficient and economically viable.

North America Combine Harvester Industry Segmentation

North America 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 Country:

- United States
- Canada

North America Combine Harvester Market Share

Based on country, the market is segmented into Canada and the United States. Canada is projected to grow at a CAGR of 3.8% during the forecast period of 2025-2034 amid growing labour shortages and the rising adoption of advanced technologies in the agricultural sector.

Leading Companies in the North America Combine Harvester Market

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Major players are focusing on the manufacturing of technologically equipped combine harvesters to gain a competitive edge in the market.

Kubota Corporation

Established in 1890 and based in Osaka, Japan, Kubota offers a diverse array of products and technologies to address challenges related to food, water, and environmental sustainability. Kubota Corporation, along with its subsidiaries, produces and markets a variety of machinery and other industrial and consumer goods across Asia, North America, Europe, and beyond.

Yanmar Holdings Co., Ltd.

YANMAR HOLDINGS CO., LTD. was established in 1912 and is based in Kita-ku, Japan. The company specialises in the production and sale of engines that serve various purposes, such as powering seagoing vessels, recreational boats, construction machinery, agricultural tools, and generator sets.

CNH Industrial N.V.

Established in 2012 and headquartered in the United Kingdom, CNH is a premier provider of equipment and services dedicated to the sustainable advancement of agriculture and construction professionals. The company offers strategic guidance, research and development expertise, and investments that facilitate the success of its primary brands.

Deere & Company

Deere & Company was established in 1837 and is headquartered in Illinois, United States. The company specialises in the production of agricultural machinery, heavy equipment, forestry machinery, diesel engines, drivetrains for heavy equipment, and lawn care equipment.

Other major players in the market are Iseki & Co., Ltd., AGCO Corp., CLAAS KGaA mbH, and SDF Group, among others.

Table of Contents:

- 1 Executive Summary
 - 1.1 Market Size 2024-2025
 - 1.2 Market Growth 2025(F)-2034(F)
 - 1.3 Key Demand Drivers
 - 1.4 Key Players and Competitive Structure
 - 1.5 Industry Best Practices
 - 1.6 Recent Trends and Developments
 - 1.7 Industry Outlook
- 2 Market Overview and Stakeholder Insights
 - 2.1 Market Trends
 - 2.2 Key Verticals
 - 2.3 Key Countries
 - 2.4 Supplier Power
 - 2.5 Buyer Power
 - 2.6 Key Market Opportunities and Risks

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- 2.7 Key Initiatives by Stakeholders
- 3 Economic Summary
 - 3.1 GDP Outlook
 - 3.2 GDP Per Capita Growth
 - 3.3 Inflation Trends
 - 3.4 Democracy Index
 - 3.5 Gross Public Debt Ratios
 - 3.6 Balance of Payment (BoP) Position
 - 3.7 Population Outlook
 - 3.8 Urbanisation Trends
- 4 Country Risk Profiles
 - 4.1 Country Risk
 - 4.2 Business Climate
- 5 Global Combine Harvester Market Overview
 - 5.1 Key Industry Highlights
 - 5.2 Global Combine Harvester Historical Market (2018-2024)
 - 5.3 Global Combine Harvester Market Forecast (2025-2034)
 - 5.4 Global Combine Harvester Market Share by Region
 - 5.4.1 North America
 - 5.4.2 Europe
 - 5.4.3 Asia Pacific
 - 5.4.4 Latin America
 - 5.4.5 Middle East and Africa
- 6 North America Combine Harvester Market Overview
 - 6.1 Key Industry Highlights
 - 6.2 North America Combine Harvester Historical Market (2018-2024)
 - 6.3 North America Combine Harvester Market Forecast (2025-2034)
- 7 North America Combine Harvester Market by Type
 - 7.1 Self-propelled
 - 7.1.1 Historical Trend (2018-2024)
 - 7.1.2 Forecast Trend (2025-2034)
 - 7.2 Tractor-pulled Combine
 - 7.2.1 Historical Trend (2018-2024)
 - 7.2.2 Forecast Trend (2025-2034)
 - 7.3 PTO-powered Combine
 - 7.3.1 Historical Trend (2018-2024)
 - 7.3.2 Forecast Trend (2025-2034)
- 8 North America Combine Harvester Market by Type of Movement
 - 8.1 Wheel Type
 - 8.1.1 Historical Trend (2018-2024)
 - 8.1.2 Forecast Trend (2025-2034)
 - 8.2 Crawler Type
 - 8.2.1 Historical Trend (2018-2024)
 - 8.2.2 Forecast Trend (2025-2034)
- 9 North America Combine Harvester Market by Country
 - 9.1 United States of America
 - 9.1.1 Historical Trend (2018-2024)

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- 9.1.2 Forecast Trend (2025-2034)
- 9.2 Canada
 - 9.2.1 Historical Trend (2018-2024)
 - 9.2.2 Forecast Trend (2025-2034)
- 10 Market Dynamics
 - 10.1 SWOT Analysis
 - 10.1.1 Strengths
 - 10.1.2 Weaknesses
 - 10.1.3 Opportunities
 - 10.1.4 Threats
 - 10.2 Porter's Five Forces Analysis
 - 10.2.1 Supplier's Power
 - 10.2.2 Buyer's Power
 - 10.2.3 Threat of New Entrants
 - 10.2.4 Degree of Rivalry
 - 10.2.5 Threat of Substitutes
 - 10.3 Key Indicators of Demand
 - 10.4 Key Indicators of Price
- 11 Competitive Landscape
 - 11.1 Supplier Selection
 - 11.2 Key Global Players
 - 11.3 Key Regional Players
 - 11.4 Key Player Strategies
 - 11.5 Company Profiles
 - 11.5.1 Kubota Corporation
 - 11.5.1.1 Company Overview
 - 11.5.1.2 Product Portfolio
 - 11.5.1.3 Demographic Reach and Achievements
 - 11.5.1.4 Certifications
 - 11.5.2 Yanmar Holdings Co., Ltd.
 - 11.5.2.1 Company Overview
 - 11.5.2.2 Product Portfolio
 - 11.5.2.3 Demographic Reach and Achievements
 - 11.5.2.4 Certifications
 - 11.5.3 CNH Industrial N.V.
 - 11.5.3.1 Company Overview
 - 11.5.3.2 Product Portfolio
 - 11.5.3.3 Demographic Reach and Achievements
 - 11.5.3.4 Certifications
 - 11.5.4 Deere & Company
 - 11.5.4.1 Company Overview
 - 11.5.4.2 Product Portfolio
 - 11.5.4.3 Demographic Reach and Achievements
 - 11.5.4.4 Certifications
 - 11.5.5 Iseki & Co., Ltd.
 - 11.5.5.1 Company Overview
 - 11.5.5.2 Product Portfolio

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- 11.5.5.3 Demographic Reach and Achievements
- 11.5.5.4 Certifications
- 11.5.6 AGCO Corp.
 - 11.5.6.1 Company Overview
 - 11.5.6.2 Product Portfolio
 - 11.5.6.3 Demographic Reach and Achievements
 - 11.5.6.4 Certifications
- 11.5.7 CLAAS KGaA mbH
 - 11.5.7.1 Company Overview
 - 11.5.7.2 Product Portfolio
 - 11.5.7.3 Demographic Reach and Achievements
 - 11.5.7.4 Certifications
- 11.5.8 SDF Group
 - 11.5.8.1 Company Overview
 - 11.5.8.2 Product Portfolio
 - 11.5.8.3 Demographic Reach and Achievements
 - 11.5.8.4 Certifications
- 11.5.9 Others

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