

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

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Report description:

The global combine harvester market reached approximately USD 52.47 Billion in 2024. The market is further projected to grow at a CAGR of 3.70% between 2025 and 2034, reaching a value of USD 75.46 Billion by 2034.

Combine harvester is an agricultural equipment that aids in cutting, sorting, and cleaning grains. The agricultural machine can thresh, harvest, and winnow wheat, sunflower, rice, pulses, and corn, among other crops. The machine helps in reducing operational costs and helps in saving time while decreasing the requirement for human labour.

Rising adoption of precision farming is aiding the growth of the combine harvester market. Precision farming improves crop yield, assists in reducing post-harvest waste, saves time, and reduces labour costs. Such advantages are boosting the adoption of advanced agricultural machinery resulting in an increased demand for combine harvesters.

Combine Harvester Market Trends

The declining utilisation of animals and human resources in the agricultural sector is a crucial trend in combine harvester market which is offering lucrative growth opportunities. The lack of availability of cheap labour in rural regions due to migration of youth to urban cities is further bolstering the utilisation of combine harvesters in various regions across the globe.

Increased investments by the key market players towards research and development activities to enhance the functioning of combine harvesters along with rising governmental initiatives to promote the adoption of advanced agricultural equipment are boosting the market expansion.

Recent Developments

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As per the combine harvester market dynamics and trends, the government of Zimbabwe announced in August 2024 that it has secured 310 combine harvesters for the timeless reaping of the cereals. The Agricultural Engineering, Mechanisation, Farm Infrastructure Development and Soil Conservation Department in country announced it has a dry rate of USD 80 per hectare for government-based organisations and USD 100 for private players.

Industry Outlook

The global combine harvester market growth is driven by advancements in agricultural technology, increasing demand for efficient farming machinery, and supportive government policies and subsidies for agricultural equipment.

According to International Grains Council, in 2017/18, global production was 2,141.5 million tons, which increased to 2,292.6 million tons in 2021/22 before declining to 2,267.2 million tons in 2022/23. As per the combine harvester industry analysis, China and the USA were significant contributors, with China's production rising from 401.0 million tons in 2017/18 to 424.3 million tons in 2022/23. The USA saw a peak of 441.5 million tons in 2021/22 before falling to 401.8 million tons in 2022/23.

Europe's grain production fluctuated, starting at 306.3 million tons in 2017/18, peaking at 318.4 million tons in 2019/20, and then declining to 268.0 million tons in 2022/23. India's production showed steady growth from 145.4 million tons in 2017/18 to 164.5 million tons in 2022/23, which is expected to boost the growth of the combine harvester industry. Brazil experienced the most substantial growth, from 88.1 million tons in 2017/18 to 149.0 million tons in 2022/23, reflecting an impressive CAGR of 11.1%.

Russia's production saw a mixed trend, with an initial decline from 127.6 million tons in 2017/18 to 107.2 million tons in 2018/19, followed by recovery to 140.6 million tons in 2022/23. Canada's production showed moderate growth, rising from 56.6 million tons in 2017/18 to 64.8 million tons in 2022/23. Argentina experienced growth until 2021/22, reaching 90.3 million tons, but then dropped to 60.8 million tons in 2022/23. Australia had notable growth, from 33.2 million tons in 2017/18 to 59.5 million tons in 2022/23, with a CAGR of 12.4%.

Increasing grain production demands efficient harvesting solutions, which boosts the combine harvester industry revenue. The need for advanced machinery to handle higher yields and improve harvesting efficiency is crucial for sustaining this growth trend.

In 2024/25, projections suggest global grain production will reach 2,320.9 million tons. China is expected to increase its output to 445.8 million tons, while the USA may reach 448.2 million tons. Europe's production is forecasted to reach 274.5 million tons, with India and Brazil continuing their upward trends, reaching 169.0 million tons and 140.5 million tons, respectively. The overall increase in grain production necessitates the use of advanced combine harvesters, emphasizing the importance of technological advancements and efficient machinery in supporting agricultural productivity and market growth.

What Factors are Strengthening the Growth of the Global Market?

- Technological Advancements: The introduction of advanced features such as GPS, automation, and precision farming technologies in combine harvesters enhances efficiency and productivity, driving combine harvester demand growth.
- Rising Demand for Food: Increasing global population and consequent rise in food demand necessitate higher crop yields, fostering the adoption of combine harvesters to boost agricultural productivity.
- Government Support and Subsidies: Favorable government policies and subsidies for modern agricultural equipment encourage farmers to invest in combine harvesters, thus propelling market growth.
- Labor Shortages: Growing labor shortages in the agricultural sector push farmers towards mechanization, increasing the reliance on combine harvesters to manage large-scale farming operations efficiently.

What Challenges are Impacting the Global Market?

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- Volatile Commodity Prices: Fluctuations in global grain prices can affect farmers' income and their ability to invest in expensive combine harvesters, leading to uncertain combine harvester demand forecast.
- Regional Disparities in Adoption: Inconsistencies in the adoption rates of combine harvesters across different regions, particularly in developing countries, can hinder overall market growth due to varying levels of infrastructure and agricultural practices.
- Financing Constraints: Limited access to affordable financing options for farmers in emerging markets can restrict their ability to purchase modern combine harvesters, thereby impacting market expansion in these regions.

What are the Key Trends Shaping the Global Market?

- Autonomous Harvesting Technology: The rise of autonomous and semi-autonomous combine harvesters is significantly reducing the need for manual labor and increasing operational precision and efficiency in the harvesting process, which boosts combine harvester market opportunities.
- Electric and Hybrid Models: The development of electric and hybrid combine harvesters is gaining momentum, driven by the need to reduce carbon emissions and comply with stringent environmental regulations.
- Advanced Crop Monitoring Systems: Incorporation of advanced crop monitoring systems in combine harvesters allows for better yield prediction and optimization of harvesting schedules, enhancing overall productivity.

Competitive Factors in the Global Market

- Competitive factors in the global combine harvester market include technological innovation, with companies investing heavily in advanced features such as automation and precision farming.
- Price competitiveness is crucial, as high initial costs can deter potential buyers. Brand reputation and reliability play significant roles, as farmers seek durable and efficient machines.
- Market players also focus on expanding their global footprint through strategic partnerships and mergers. After-sales services, including maintenance and spare parts availability, are vital for customer retention.
- Additionally, addressing regional agricultural needs through customization and providing flexible financing options enhances market competitiveness and customer satisfaction.

Key Price Indicators in the Global Combine Harvester Market

- Raw Material Costs: Fluctuations in the prices of essential raw materials such as steel, aluminum, and electronic components significantly impact the manufacturing costs and, consequently, the prices of combine harvesters and combine harvester market value.
- Technological Integration: The incorporation of advanced technologies, including GPS systems, automation, and precision farming tools, increases the production costs, affecting the overall prices of combine harvesters.
- Currency Exchange Rates: Variations in exchange rates can influence the cost of imported components and the pricing strategies of global manufacturers, particularly in export-heavy regions.
- Tariffs and Trade Policies: Changes in international trade policies, tariffs, and import/export regulations can affect the cost structure and pricing strategies of combine harvester manufacturers operating in global markets.

Global Combine Harvester Industry Segmentations

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

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Breakup by Type

- Self-propelled
- Tractor-pulled Combine
- PTO-powered Combine

Breakup by Power

- Below 150 HP
- 150 to 450 HP
- 450 to 550 HP
- Above 550 HP

Breakup by Type of Movement

- Wheel Type
- Crawler Type

Breakup by Region

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Combine Harvester Market Share by Type

Self-propelled combine harvesters are anticipated to account for a significant combine harvester market share. This type of combine harvester provides high power in the fields with the help of their heavy-duty engines. The segment growth can also be attributed to the high efficiency and low maintenance costs of the product. These harvesters are most suitable for farms with hard soils and are also useful for traditional grain crops including mustard, paddy, and soyabean, among others.

Competitive Landscape

The comprehensive EMR report provides an in-depth assessment of the market based on the Porter's five forces model along with giving a SWOT analysis. The report gives a detailed analysis of the following key players in the market, covering their competitive landscape and latest developments like mergers, acquisitions, investments, and expansion plans.

CNH Industrial N.V.

CNH Industrial N.V., headquartered in Basildon, United Kingdom, is an agricultural machinery manufacturing and construction equipment manufacturing company that designs, produces, and sells agricultural combines, speciality harvesting equipment, and tractors, among others.

AGCO Corporation

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AGCO Corporation, headquartered in Georgia, United States, is known to design, manufacture, and sell foragers, tractors, hay tools, seeding equipment, combines, and smart farming technologies, among others. They are dedicated towards providing sustainable and smart agricultural solutions to farmers across the globe.

Mahindra & Mahindra Ltd.

Mahindra & Mahindra Ltd., headquartered in Maharashtra, India, is an automotive manufacturing corporation in combine harvester industry that provides a wide range of products for domestic as well as international customers. The combine harvesters manufactured by the company deliver superior performance in both wet and semi-wet soil conditions.

Other market key players include Deere & Company, Claas KGaA GmbH, SDF S.p.A. (DEUTZ-FAHR), KUBOTA Corporation, Yanmar Holdings Co., Ltd., Iseki & Co., Ltd., and Preet Group, among others.

Combine Harvester Market Regional Analysis

The Asia Pacific is expected to account for a significant share of the market over the forecast period. This growth can be attributed to the increasing initiatives by the governments in the region to support the adoption of modern agricultural equipment including combine harvesters. Rising food requirement due to increasing population and growing export of various crops is further boosting the combine harvester market demand in the Asia Pacific. The presence of a well-established agricultural sector and various key market players are further supporting the demand of combine harvester market in the region.

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