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Canada Agricultural Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-08-01 | 80 pages | Mordor Intelligence

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Report description:

Canada Agricultural Machinery Market Analysis

The Canada agricultural machinery market size stands at USD 6.50 billion in 2025 and is projected to reach USD 8.38 billion by 2030, translating into a 5.2% CAGR over the forecast period. Structural labor shortages, the USD 3.5 billion Sustainable Canadian Agricultural Partnership, and accelerating uptake of precision technologies have created a resilient demand foundation despite financing headwinds. Farmers are replacing human labor with autonomous and semi-autonomous machines while simultaneously modernizing fleets to capitalize on carbon-credit incentives and water-efficient irrigation systems. Competitive intensity has risen as digital-first newcomers pressure incumbent Original Equipment Manufacturers (OEMs), leading to faster product cycles, retrofit solutions, and integrated hardware-software offerings. These dynamics underpin a steady expansion path for the Canada agricultural machinery market, particularly in Western provinces where large-scale grain operations and supportive policy frameworks converge.

Canada Agricultural Machinery Market Trends and Insights

Shortage of Agricultural Labor

Canada's farm labor gap is forecast to hit 113,800 positions by 2025 and 123,000 by 2030, forcing producers to invest in autonomous tractors, robotic harvesters, and remote-operation platforms. Temporary foreign workers already cover roughly 75% of seasonal needs, yet elevated turnover and rising wage expectations persist. OEMs (Original Equipment Manufacturers) such as

Deere & Company and AGCO Corporation are fast-tracking autonomous retrofit kits and full-electric self-driving tractors aimed at commercial launch by 2026. Larger machines that cover more acres per hour now command premium pricing as operators seek to maximize output per remaining worker. As a result, mid-range horsepower segments are stagnating while high-horsepower and specialty robotics segments capture incremental Canada agricultural machinery market demand.

Government Subsidies and Tax Incentives for Mechanization

Federal and provincial grants cover up to 50% of eligible equipment costs under the Agricultural Clean Technology Program, with awards ranging from USD 25,000 to USD 2 million. British Columbia tops provincial support with a 65% cost-share on technology purchases up to USD 100,000, accelerating small-farm modernization. The Sustainable Canadian Agricultural Partnership injects USD 3.5 billion into competitiveness initiatives over five years, directly subsidizing precision sprayers, low-emission tractors, and smart irrigation pivot retrofits. Interest-free advances up to USD 250,000 under the Advance Payments Program further soften financing costs, particularly for grain growers facing volatile commodity cycles. Subsidy stacking creates a multiplier effect on private capital, prompting a near-term spike in Canada agricultural machinery market orders ahead of funding windows.

High Upfront Procurement and Maintenance Cost

Large self-propelled machines now list between USD 400,000 and USD 1.2 million, while annual maintenance can consume up to 20% of operating budgets. Farmers increasingly scour auction sites for late-model equipment, but competition from U.S. buyers inflates bids, narrowing domestic supply. Software subscriptions for precision platforms add recurring expenses, pressing smaller growers to consider cooperative ownership or equipment-as-a-service agreements. Despite OEM extended-warranty offerings, cash-strapped operators continue delaying purchases, tempering near-term Canada agricultural machinery market growth.

Other drivers and restraints analyzed in the detailed report include:

Technological Advancements in Precision and Autonomous Machinery / Aging Tractor Fleet Replacement Cycle / Security and Data-Privacy Risks in Connected Machinery /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Tractors generated 45.0% of the Canada agricultural machinery market share in 2024, reflecting their indispensable role across row-crop, forage, and specialty operations. High-horsepower categories (? 100 HP) experienced a 4.3% annual demand uptick, driven by farm consolidation, autonomous retrofits, and labor substitution needs. In contrast, mid-range 40-99 HP sales dipped 6% as cash constraints led operators to extend service life rather than upgrade mid-class units.

Irrigation machinery represents the fastest-growing segment with a 5.9% CAGR. Drip systems gain traction in specialty crops across British Columbia and Ontario, while variable-rate pivots spread through Prairie grain farms seeking precise soil-moisture management. Water-use regulations and climate risk adaptation drive demand for soil-sensor networks that integrate with pivot controllers, creating cross-sell opportunities with agronomic software vendors. OEMs differentiate through energy-efficient pumps, remote fault detection, and modular add-ons that retrofit existing pivots. These advances attract government rebates aimed at water conservation, further catalyzing irrigation sales inside the Canada agricultural machinery market.

The Canada Agricultural Machinery Market Report is Segmented by Product Type (Tractors, Plowing and Cultivating Machinery, Planting Machinery, Sprayers, Irrigation Machinery, Harvesting Machinery, Haying and Forage Machinery, and Other Types). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

Deere & Company / CNH Industrial N.V. / AGCO Corporation / Kubota Corporation / Claas KGaA mbH / Same Deutz-Fahr (SDF Group) / Kuhn Group (Bucher Industries) / Mahindra and Mahindra Ltd. / Buhler Industries Inc. (ASKO Sinai) / Hardi North America (Exel Industries) / MacDon Industries (Linamar Corporation) / Degelman Industries LP /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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