

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

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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Report description:

Harvesting Machinery Market Analysis

The Harvesting Equipment Market size is estimated at USD 31.86 billion in 2025, and is anticipated to reach USD 41.84 billion by 2030, at a CAGR of 5.60% during the forecast period. Growth is propelled by steady mechanization, the spread of precision agriculture, and the arrival of autonomous functions that reduce labor dependence. The Asia-Pacific remains the center of demand, while the Middle East and Africa post the quickest gains as subsidy programs and contract-harvesting models take hold. Diesel engines still dominate powertrains, yet double-digit growth for hybrid and electric solutions signals an important transition that aligns with tightening emissions rules. Crop diversification, particularly the rise of specialty crops, is broadening the application base for sophisticated machinery and creating new revenue streams for data-driven service offerings.

Global Harvesting Machinery Market Trends and Insights

Rising Demand for High-Capacity Combine Harvesters

Mechanical harvesting is gaining momentum across China and India as larger farm clusters emerge and policymakers channel subsidies toward modern equipment. Broad-acre crops harvested with high throughput combine lower post-harvest losses, improve grain quality, and shorten turnaround times between planting cycles. This confluence of scale, technology, and policy is projected to maintain the region's leadership in combined upgrades through the medium term.

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Government Incentives Accelerating Mechanization in Developing Economies

Public-sector grants, tax rebates, and subsidized loans are reshaping the harvesting equipment market, particularly in Africa and parts of South America. National mechanization roadmaps now prioritize harvesters alongside tractors, viewing them as essential to post-harvest loss reduction and food-security targets. Several countries are linking subsidies to domestic assembly conditions, nudging global brands to establish knock-down facilities and engage local partners for after-sales support.

High Upfront Cost Versus Small-Farm Income Levels

Modern combines can cost between USD 300,000 and USD 500,000, a figure beyond the reach of most smallholders. Fragmented land holdings in Africa and South Asia dilute machinery utilization rates and elongate payback periods. Acute financing gaps widen technology adoption divides and sustain a secondary market for aging, high-emission machines that underperform on fuel and grain quality.

Other drivers and restraints analyzed in the detailed report include:

Labor Scarcity And Wage Inflation Are Pushing Automation / Integration of Precision Agriculture and Telematics into Harvesters / Limited Dealer and Service Networks in Africa and the Middle East /

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

Segment Analysis

Combine harvesters generated the highest revenue in 2024, accounting for 65% of the harvesting equipment market. Continuous improvements in sensing modules and automation packages now enable operators to delegate most threshing, separation, and cleaning adjustments to software, which raises throughput while conserving fuel. The cost-benefit proposition drives replacement demand among commercial farms facing tighter labor markets. Rising yield penalties from manual cutting, plus health and safety rules, strengthen the case for self-propelled cane machines in these regions.

In contrast, sugar-cane harvesters, though smaller in volume, are forecast to post a 7.5% CAGR to 2030 as Brazil, India, and Thailand expand the acreage under mechanized cane. Rising yield penalties from manual cutting, plus health and safety rules, strengthen the case for self-propelled cane machines in these regions. Manufacturers tailor sugar-cane models for narrow-row layouts, steep slopes, and wetter soils, integrating telematics that report billet length uniformity and extractor-fan speed. Such crop-specific refinements support premium pricing. Forage harvesters, essential for dairy ration quality, maintain mid-single-digit growth as operators upgrade to models with precision chop length control and silage-inoculant applicators.

The Harvesting Machinery Market Report is Segmented by Machinery Type (Combine Harvester, Forage Harvester, and More), by Power Source (Diesel and Hybrid/Electric), by Crop Type (Grains and Cereals, Forage Crops, and More), and by Geography (North America, Europe, South America, and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Units).

Geography Analysis

Asia-Pacific anchors 45% of the harvesting equipment market and continues to outpace global averages through 2030. Rapid consolidation of cropland in China and growing contract-harvesting fleets in India stimulate continual fleet renewal. Provincial subsidies in China reimburse up to 30% of eligible machine costs, influencing technology choices toward models with precision guidance that aligns with national yield-improvement targets.

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Middle East and Africa, while representing a modest base today, is the fastest-growing region at an 8% CAGR between 2025 and 2030. Governments prioritize mechanization to secure grain self-sufficiency and reduce post-harvest losses that can exceed 20% in smallholder systems. Import-duty waivers on components and credit guarantees for cooperative fleets aim to leverage scale effects. The Middle East remains an emerging locale where controlled-environment agriculture and government-backed desert farming require specialized harvesters for greenhouse tomatoes, leafy greens, and date palms. Investment incentives and free-zone logistics encourage multinational brands to position regional distribution hubs, closing lead-time gaps and fostering parts availability.

North America and Europe contribute a combined quarter of global sales but differ in replacement dynamics. North American growers focus on integrating autonomy and connectivity into existing fleets, leading to a rise in retrofit kits that extend asset life while delivering advanced functionality. Europe, guided by stringent emissions rules and Common Agricultural Policy incentives, accelerates the adoption of hybrid and electric units.

List of Companies Covered in this Report:

Deere & Company / CNH Industrial N.V. / AGCO Corporation / CLAAS KGaA mbH / Kubota Corporation / Mahindra & Mahindra Ltd. / Yanmar Co., Ltd. / SDF Group (Same Deutz-Fahr) / Tractors & Farm Equipment Ltd. /

Additional Benefits:

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

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