

Australia Agricultural Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 80 pages | Mordor Intelligence

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Report description:

Australia Agricultural Machinery Market Analysis

The Australia agricultural machinery market is expected to grow from USD 4.88 billion in 2025 to USD 5.26 billion in 2026 and is forecast to reach USD 7.62 billion by 2031 at 7.7% CAGR over 2026-2031. Persistent labor shortages, mounting wage inflation, and government incentives for digital connectivity are accelerating capital-intensive farming models across every production zone. Financial rebates for water-efficient irrigation, rising carbon-credit revenues, and the roll-out of renewable-powered equipment are reinforcing equipment purchasing confidence, while manufacturers differentiate through subscription-free precision technology and integrated digital ecosystems. Although supply-chain delays and steep insurance premiums inflate ownership costs, growers continue to prioritize high-horsepower tractors, autonomous harvesting platforms, and IoT-enabled irrigation systems that ease labor pressure and unlock data-driven gains. Evolving procurement patterns, especially in northern development corridors, position the Australia agricultural machinery market for robust multi-year expansion that outpaces historic mechanization cycles.

Australia Agricultural Machinery Market Trends and Insights

Declining Labor Availability and Rising Labor Cost

Australia's farm workforce is shrinking and aging, forcing a structural pivot toward capital-intensive operations that rely on automation. Surveys confirm precision agriculture can cut manual labor by as much as 30%, making autonomous and

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semi-autonomous tractors an immediate solution rather than a future option. Skilled operator wages are surging fastest, amplifying payback on driverless platforms. Regional hotspots such as Northern Queensland horticulture hubs now document four jobs created per 100 ML of water, spotlighting the urgency of automated handling as acreage expands.

Government Rebates for Water-Efficient Irrigation Equipment

The On Farm Connectivity Program has already issued USD 13.8 million in rebates covering up to 50% of hardware costs, and Round 3 injects another USD 20 million by late 2025. Queensland's Drought Preparedness Grants add up to USD 50,000 per farm, accelerating pivot upgrades and drip conversions. With application windows closing once funds are exhausted, growers have rushed procurement, front-loading 2024-2026 sales of sensors, controllers, and variable-rate pumps.

High Upfront and Maintenance Costs of Machinery

Insurance for large combines has jumped more than 300% since 2022, while critical parts are priced well above pre-pandemic levels, prompting growers to cut planting intentions and postpone upgrades. Total cost of ownership now hinges on proprietary software fees as well as specialized electronic components, keeping break-even thresholds high for small operations despite new leasing models. A national survey of 480 Australian grain growers found that machinery-related costs, including labor, contracting, repairs, and maintenance, averaged USD 686 per hectare.

Other drivers and restraints analyzed in the detailed report include:

Rapid Technological Advances Surge in Carbon-Credit-Funded Farm Upgrades Data Privacy Risks in Cloud-Linked Equipment

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

Segment Analysis

Tractors command the largest market share at 57.85% in 2025 while simultaneously driving the highest growth trajectory at 8.75% CAGR through 2031, reflecting their evolution from basic power units to sophisticated precision agriculture platforms. Deere & Company's announcement of nearly USD 20 billion in U.S. manufacturing investment over the next decade, combined with its commitment to demonstrate a fully autonomous corn and soybean production system by 2030, exemplifies the technological transformation occurring within this segment. The segment's growth is being driven by the integration of AI-powered automation features, with manufacturers introducing predictive groundspeed automation and harvest settings optimization that enhance productivity while reducing operator fatigue. Mahindra & Mahindra Ltd.'s USD 145 million investment in the OJA tractor platform, featuring lightweight 4WD designs with connectivity, precision, and automation capabilities, demonstrates the global shift toward technologically advanced compact tractors suitable for diverse agricultural applications.

Ploughing and cultivating machinery represents a mature but stable segment, with growth primarily driven by precision tillage technologies that optimize soil preparation while minimizing environmental impact. Planting machinery is experiencing renewed interest due to precision seeding technologies that enable variable-rate application and real-time monitoring of seed placement accuracy. Harvesting machinery continues to evolve with advanced automation features, as evidenced by Deere & Company's S7 series combine introduction featuring predictive automation and harvest settings optimization. Haying and forage machinery benefits from increasing livestock feed quality requirements and the need for efficient forage preservation systems. Irrigation machinery is experiencing accelerated growth due to water scarcity concerns and government rebate programs, with Netafim Ltd's launch of GrowSphere, an all-in-one digital farming operating system that integrates hydraulic, operational, and agronomic capabilities. Other machinery types, including grain dryers and farm loaders, are benefiting from the overall mechanization trend and the need for post-harvest processing efficiency improvements.

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

List of Companies Covered in this Report:

Deere & Company Kubota Corporation CNH Industrial N.V. AGCO Corporation Mahindra & Mahindra Ltd. Valmont Industries, Inc. Netafim Ltd. (Orbia Advance Corp.) CLAAS KGaA mbH KUHN SAS (Bucher Industries AG) SDF S.p.A. HARDI Australia (Exel Industries SA) Croplands Equipment Pty Ltd (Nufarm) Agrifarm Implement

Additional Benefits:

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

Table of Contents:

- 1 Introduction
 - 1.1 Study Assumptions and Market Definition
 - 1.2 Scope of the Study
- 2 Research Methodology
- 3 Executive Summary
- 4 Market Landscape
 - 4.1 Market Overview
 - 4.2 Market Drivers
 - 4.2.1 Declining Labor Availability and Rising Labor Cost
 - 4.2.2 Government Rebates for Water-Efficient Irrigation Equipment
 - 4.2.3 Rapid Technological Advances
 - 4.2.4 Surge in Carbon-Credit Funded Farm Upgrades
 - 4.2.5 Expansion of On-Farm Renewable Energy Enabling Electric Machinery Adoption
 - 4.2.6 Growth of Large-Sale Horticulture in Northern Australia
 - 4.3 Market Restraints
 - 4.3.1 High Upfront and Maintenance Cost of Machinery
 - 4.3.2 Data-Privacy Risks in Cloud-Linked Farm Equipment
 - 4.3.3 Limited On-Farm Connectivity in Remote Regions
 - 4.3.4 Supply-Chain Delays for Spare Parts
 - 4.4 Regulatory Landscape
 - 4.5 Technological Outlook
 - 4.6 Porter's Five Forces Analysis
 - 4.6.1 Bargaining Power of Suppliers
 - 4.6.2 Bargaining Power of Buyers
 - 4.6.3 Threat of New Entrants
 - 4.6.4 Threat of Substitute Products
 - 4.6.5 Intensity of Competitive Rivalry

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5 Market Size and Growth Forecasts (Value)

5.1 By Machinery Type

5.1.1 Tractors

5.1.1.1 Horsepower

5.1.1.1.1 Below 40 HP

5.1.1.1.2 40 -120 HP

5.1.1.1.3 Above 120 HP

5.1.1.2 Utility Type

5.1.1.2.1 Compact Utility Tractors

5.1.1.2.2 Utility Tractors

5.1.1.2.3 Row Crop Tractors

5.1.2 Ploughing and Cultivating Machinery

5.1.2.1 Ploughs

5.1.2.2 Harrows

5.1.2.3 Cultivators and Tillers

5.1.2.4 Other Planting and Cultivating Machinery (Rotary Hoes, Ridge Formers, etc.)

5.1.3 Planting Machinery

5.1.3.1 Seed Drills

5.1.3.2 Planters

5.1.3.3 Spreaders

5.1.3.4 Other Planting Machinery (Transplanters, Bed Planters, etc.)

5.1.4 Harvesting Machinery

5.1.4.1 Combine Harvesters

5.1.4.2 Forage Harvesters

5.1.4.3 Other Harvesting Machinery (Sugarcane Harvesters, Potato Harvesters, etc.)

5.1.5 Haying and Forage Machinery

5.1.5.1 Mowers and Conditioners

5.1.5.2 Balers

5.1.5.3 Other Haying and Forage Machinery (Tedders, Rakes, etc.)

5.1.6 Irrigation Machinery

5.1.6.1 Sprinkler Irrigation

5.1.6.2 Drip Irrigation

5.1.6.3 Other Irrigation Machinery (Pivot Corner Arms, Flood Irrigation Sets, etc.)

5.1.7 Other Types (Grain Dryers, Farm Loaders, etc.)

6 Competitive Landscape

6.1 Market Concentration

6.2 Strategic Moves

6.3 Market Share Analysis

6.4 Company Profiles (Includes Global Level Overview, Market Level Overview, Core Segments, Financials as Available, Strategic Information, Market Rank/Share for Key Companies, Products and Services, and Recent Developments)

6.4.1 Deere & Company

6.4.2 Kubota Corporation

6.4.3 CNH Industrial N.V.

6.4.4 AGCO Corporation

6.4.5 Mahindra & Mahindra Ltd.

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- 6.4.6 Valmont Industries, Inc.
- 6.4.7 Netafim Ltd. (Orbia Advance Corp.)
- 6.4.8 CLAAS KGaA mbH
- 6.4.9 KUHN SAS (Bucher Industries AG)
- 6.4.10 SDF S.p.A.
- 6.4.11 HARDI Australia (Exel Industries SA)
- 6.4.12 Croplands Equipment Pty Ltd (Nufarm)
- 6.4.13 Agrifarm Implement

7 Market Opportunities and Future Outlook

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