

Brazil 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:

Brazil Agricultural Machinery Market Analysis

The Brazil agricultural machinery market is expected to grow from USD 7.93 billion in 2025 to USD 8.42 billion in 2026 and is forecast to reach USD 11.38 billion by 2031 at 6.22% CAGR over 2026-2031. Continued expansion of large-scale soybean, corn, and sugarcane farms, wider access to subsidized credit, and rapid diffusion of precision farming tools are the core engines propelling the Brazil agricultural machinery market. Demand remains resilient even in a high-interest-rate environment because government programs channel low-cost funds toward machinery upgrades, and OEM (Original Equipment Manufacturer) service bundles cut operating costs through predictive maintenance. Farm consolidation in the Center-West supports steady replacement cycles for tractors and harvesters, while frontier regions such as Matopiba (a region formed by parts of Tocantins, Maranhao, Piaui, and Bahia states) fuel first-time purchases of irrigation and spraying systems. At the same time, carbon-credit incentives and sustainability mandates expand the addressable base for fuel-efficient models that lower emissions and capture additional income streams for growers.

Brazil Agricultural Machinery Market Trends and Insights

Digital-ag Credit from Government Policies

Plano Safra 2025/26 released BRL 516.2 billion (USD 93.9 billion) in rural credit, with lines priced at 2.5% for machinery up to BRL 100,000 (USD 18,200) and 5% up to BRL 250,000 (USD 45,500). Embedded fintech processes accelerate loan approval, enabling

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mid-sized growers to transition from cash purchases to structured financing. BNDES (The Brazilian Economic and Social Development Bank) added BRL 70 billion (USD 12.8 billion) solely for tech-enabled equipment bundles, linking funding to precision-ag Key Performance Indicators. Newly issued digital grain receipts (CPRs) are now accepted as collateral, broadening credit access for tenant farmers.

Expansion of Center-Pivot Financing via Banks

Center-pivot counts in Mato Grosso leapt 226% in one year as lenders lengthened amortization to eight harvest cycles. Lindsay Corporation's Smart Pivot trials confirmed 15% yield lifts and 27% water savings, validating the returns that underpin those loan products. Insurers now bundle rainfall-index coverage with irrigation loans, trimming default risk tied to drought. Equipment dealers respond by stocking modular spans that can be expanded when growers refinance.

High Financing Costs Amid Selic Volatility

The Selic climbed from 10.5% to 13.25% in early 2025, driving commercial equipment loans above 20%. Bank data show a 30% drop in non-subsidized applications, with mid-size growers delaying combine replacements. Currency swings inflate imported parts costs, further eroding purchasing power. Some OEMs now offer factory-backed rate buy-downs to keep volumes moving.

Other drivers and restraints analyzed in the detailed report include:

OEM Telematics-as-a-Service Bundles Carbon-Credit Premiums for Tractors Data-Sovereignty Litigation on Farm Analytics

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

Segment Analysis

Tractors accounted for 45.32% of Brazil agricultural machinery market share in 2025, underscoring their position as the primary power source across grain, sugarcane, and mixed-farming operations. Their broad utility makes them the anchor of fleet-renewal cycles, and steady replacement demand in the Center-West keeps this segment the largest contributor to Brazil agricultural machinery market size. Harvesting and spraying equipment follow in value as growers pair combines and self-propelled sprayers with precision guidance to protect yield and curb input waste. Irrigation systems post double-digit value gains in frontier regions, yet their absolute share remains smaller because high upfront costs limit initial adoption outside Mato Grosso and Goias.

Hay and forage machinery is the fastest-growing category, advancing at a 5.82% CAGR through 2031 as integrated crop-livestock systems widen across the Cerrado and South. Growth in planting and cultivation equipment stays linked to conservation tillage practices that require lighter, residue-friendly implements rather than deep inversion tools. Demand for planting, harvesting, and spraying machinery also benefits from bundled telematics that convert capital purchases into data-driven productivity gains. Together, these trends reinforce a balanced expansion pattern in which tractors retain scale leadership while hay and forage equipment captures the momentum edge within the Brazil agricultural machinery market.

The Brazil Agricultural Machinery Market Report is Segmented by Machinery Type (Tractors, Plowing and Cultivating Machinery, Planting Machinery, Harvesting Machinery, Hay and Forage Machinery, Irrigation Machinery, and Spraying Machinery). 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 Mahindra & Mahindra Ltd Maquinas Agricolas Jacto

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Additional Benefits:

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

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