

Europe Agriculture Equipment Market Research Report 2026-2031

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Report description:

The Europe agriculture equipment market is expected to grow at a CAGR of 1.28% from 2025 to 2031.

IMPACT OF TARIFF

- A trade war is an economic conflict where countries place tariffs or other trade barriers on each other, usually in response to similar actions. A global trade war began when the U.S. started adding tariffs on more countries.

- On April 2, 2025, U.S. President Donald Trump announced new tariffs, called reciprocal tariffs, on imports from around 90 countries.

- The local manufacturing of agricultural equipment is also impacted by the implementation of tariffs on raw materials imported into the European market from other countries. High tariffs imported raw materials such as iron, steel, rubber, aluminium and glass. The US government presently have 50% tariff rates on steel and aluminium imports from other countries.

EUROPE AGRICULTURAL EQUIPMENT MARKET TRENDS

Use of Digital Channels for Agriculture Equipment Sales

In Europe, the digital sales channels for agricultural equipment have evolved rapidly as farmers increasingly research, compare, and transact online instead of relying solely on traditional dealerships. This shift is driven by greater digital savviness among users, broader internet access, and a growing demand for simplified cross-border buying and selling.

The overall trend is toward greater online transparency, digital negotiation, and integrated service, making buying and selling farm equipment more efficient across Europe's diverse markets.

Rising Focus on Compact & Electric Agriculture Equipment

In 2025, the growing trend of electric and compact agricultural equipment in Europe reflects a strong shift toward sustainable,

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efficient, and flexible farm machinery. This trend is driven by stringent EU emissions standards, government incentives for zero-emission equipment, and farmers' demand for lower operating costs and less environmental impact, especially on smaller and mid-sized farms.

Europe is expected to remain a key region for electrification and compact equipment adoption, with Germany, France, Italy, the UK, and the Netherlands leading the transition toward greener agricultural practices.

Overall, electrification and compact design in agriculture are reshaping Europe's equipment market by enabling zero-emission, quieter, and cost-effective alternatives that align with sustainability goals and operational flexibility.

EUROPE AGRICULTURAL EQUIPMENT MARKET DRIVERS

Government Policy and Credit Support System

In 2025, government policies and credit support systems are essential drivers of demand for agricultural equipment in the European market. Public funding and financing incentives help reduce the high upfront costs of modern machinery, promote mechanization, and support sustainable farming practices.

The European Union's Common Agricultural Policy (CAP) provides direct income support, grants, and rural development funding aimed at improving productivity and farm viability across member states.

These policies, combined with flexible financing options from banks and rural credit institutions, are expanding access to advanced agricultural equipment, leading to higher adoption rates across Europe's diverse farming sector.

Increased Farm Mechanization

In 2025, the growing trend of farm mechanization is significantly driving demand for agricultural equipment in Europe. As labour becomes increasingly scarce and costly, many farmers are turning to machinery to bridge the gap. This shift enhances efficiency and reduces reliance on manual labour. Overall, mechanization in Europe farming accelerates the demand for agricultural equipment.

Overall, the growing mechanization of European farms-driven by labour dynamics, policy support, and technological advancements-is expanding the demand for various agricultural equipment, ranging from traditional tractors to smart, automated machinery.

INDUSTRY RESTRAINTS

Growing Demand for Second-Hand Equipment

In 2025, the increasing demand for second-hand agricultural equipment in Europe is significantly impacting the sales of new agricultural machinery. Many farmers, particularly smaller operations or those facing financial difficulties, are opting for used tractors, harvesters, and implements due to the substantial cost savings they offer compared to new equipment.

This trend has become especially pronounced amid economic uncertainty, high interest rates, and tight farm budgets, leading buyers to postpone large investments in new machines and instead turn to more affordable pre-owned options.

Overall, the vibrant second-hand segment meets the demand for affordable machinery, but it also constrains new equipment sales, particularly among cost-sensitive farmers in Europe.

Labor Shortage Restricts Demand for Agriculture Equipment

In 2025, labor shortages in agriculture are increasingly viewed as a significant constraint on the demand for agricultural equipment in the European market.

While a lack of workers may accelerate mechanization in some cases, ongoing shortages, particularly of skilled operators and

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seasonal labor can hinder investment in new machinery, as farmers struggle to effectively utilize advanced equipment without adequate human support.

Overall, labor shortages in Europe restrict the ability of farms to adopt advanced agricultural machinery, as investment returns hinge on having enough qualified operators. Shortage of agriculture labor is expected to restrict the sales of agriculture equipment in the European market.

EUROPE AGRICULTURE EQUIPMENT MARKET SEGMENTATION INSIGHTS

-□The agricultural machinery market is dominated by tractors, which are projected to hold the largest market share in 2025. This segment is expected to grow at a CAGR of 1.26%. Other agricultural equipment, such as mowers, windrowers, and balers, will collectively account for a significant market share in 2025.

-□Within the land preparation equipment segment, tillers and ploughs are key players, holding substantial market shares in 2025. This entire segment is anticipated to expand at a CAGR of 1.37% by 2031.

-□In the seedling and planting sector, planters are expected to lead, capturing a market share of over 24%% in 2025. This segment is projected to show significant growth by 2030.

-□Self-propelled harvesters hold a significant position within Europe agricultural equipment market. Their popularity stems from several advantages, including faster harvesting speeds, suitability for high-capacity farms, reduced labor dependency, and minimized crop loss due to precise cutting mechanisms. In the broader harvesting equipment segment, self-propelled harvesters are forecast to account for the market share in 2025.

-□The demand for planting and transplanting equipment is strengthening as farmers increasingly prioritize uniformity and input efficiency. Innovations such as row-by-row seed singulation, electric meters, and retrofit precision kits enable operators to achieve yield improvements without requiring complete system overhauls, offering an attractive solution when capital investment is limited.

-□Similarly, plant protection systems are evolving towards more targeted approaches. This includes the adoption of low-volume, camera-guided sprayers (often referred to as "see-and-spray" technology) and biological-friendly delivery systems. These advancements aim to reduce chemical usage and drift, thereby ensuring compliance with increasingly stringent environmental regulations.

EUROPE AGRICULTURE EQUIPMENT MARKET REGIONAL ANALYSIS

France accounted for the highest market size and is projected to grow at a CAGR of 1.45% through 2031, supported by government initiatives to support farming activities. In 2024, prices for agricultural equipment experienced a sharp increase of over 6.5%. This rise in prices can be attributed to rising inflation, although prices are expected to decrease in 2025.

Germany is the second-largest market in the European region, following France. It serves as a manufacturing hub for agricultural equipment in Europe. However, demand for agricultural equipment has been negatively affected by a labor shortage and subdued investment in the agriculture sector.

Italy ranks as the third-largest market in Europe, after France and Germany. In 2026, the market is anticipated to recover, bolstered by incentive schemes and restocking efforts by dealers following a prolonged period of decline.

Spain represents the fastest-growing region during the forecast period, driven by a higher farm mechanization rate and growing investment in agriculture sector.

Poland, while accounting for a smaller market size, is projected to grow at a CAGR of 1.22% due to by rising production costs, farm financial pressures and geopolitical uncertainties that dampened investment.

EUROPE AGRICULTURAL EQUIPMENT MARKET VENDOR ANALYSIS

The agriculture equipment market in Europe is competitive and dominated by both global and strong domestic manufacturers. Companies like John Deere, CNH Industrial, AGCO & Kubota hold a significant share of the market.

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The industry features a mix of well-established global brands and regional players. As international companies continue to strengthen their presence, smaller regional manufacturers may face challenges competing with these larger, well-resourced companies.

At AGRITECHNICA 2025, a clean-sheet, fully electric tractor makes its debut in Europe. This innovative tractor delivers approximately 130 horsepower and features modular battery packs, highlighting John Deere's commitment to low-emission powertrain solutions for European farms facing stringent emissions and sustainability regulations.

Kubota announced a strategic partnership with Norwegian ag-tech start-up Kilter to pilot and promote the AX-1 ultra-precise weeding robot in Europe, a fully autonomous spraying robot that uses AI for highly accurate weed control in vegetable crops. Deere & Company, CNH Industrials & CLASS dominated the European agriculture equipment market with a collective market share of over XX%. These players thrive on innovation in the agriculture equipment market. They are increasingly investing in developing advanced Agri machinery technology for precision farming and machine automation.

Recent Developments in Europe Agriculture Equipment Market

- [] New Holland T4 Electric Power tractor was revealed for the first time in Europe at Agritechnica 2023 after being introduced in the US in December 2022. It is a fully electric tractor with no engine that produces pollution. This tractor is part of New Holland's plan to make farming equipment cleaner. It joins other clean tractors like the T7 and T6 models that run on methane gas, helping to reduce carbon emissions.

- [] John Deere's commitment to ethical practices boosts its global reputation, earning greater trust from customers, partners, and investors. This strong ethical foundation helps drive market share growth and long-term success.

WHY SHOULD YOU BUY THIS REPORT?

This report is among the few in the market that offer outlook and opportunity analyses forecast in terms of the following:

- [] Market Size & Forecast Volume (Units) 2022-2031
- [] Segmentation by Equipment Type
- [] Production and trade values
- [] Major current and upcoming projects and investments
- [] Competitive intelligence about the economic scenario, advantages, industry dynamics, and industry shares
- [] Innovative technologies
- [] Share by each equipment segment
- [] Company profiles of major and other prominent vendors
- [] Company profiles of distributors
- [] Market shares of major vendors

Key Company Profile

- [] AGCO
- [] CNH Industrial
- [] John Deere
- [] Kubota
- [] Mahindra & Mahindra

Other Prominent Company Profiles

- [] Yanmar
- [] Same Deutz-Fahr
- [] Class
- [] Kioti
- [] ISEKI

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- Lovol Tractors
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- TYM Corporation
- EXEL Industries
- Amazone
- HORSCH Maschinen GmbH
- Pottinger Landtechnik GmbH
- LEMKEN GmbH & Co. KG

Segmentation by Equipment Type

- Land Preparation
 - o□ Tillers
 - o□ Plough
 - o□ Harrow
- Agriculture Tractor
- Seedling & Planting
 - o□ Transplanters
 - o□ Planters
 - o□ Seed Drillers
- Plant Protection
- Harvesting
 - o□ Tractor-Mounted
 - o□ Self-Propelled
- Other Equipment
 - o□ Mowers
 - o□ Windrowers
 - o□ Balers
- Geography
 - Germany
 - o□ France
 - o□ Italy
 - o□ UK
 - o□ Spain
 - o□ Poland
 - o□ Rest of Europe

KEY QUESTIONS ANSWERED:

- 1.□ How big is Europe agriculture equipment market?
- 2.□ Which region dominates the Europe agriculture equipment market share?
- 3.□ What is the growth rate of the Europe agriculture equipment market?
- 4.□ What are the significant trends in the Europe agriculture equipment market?
- 5.□ Who are the key players in European agriculture equipment market?

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