

Global Baler Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 4.8 bn
Forecast (2031)	USD 6.6 bn
CAGR (2021-2031)	5.4%
Study period	2021-2031
Largest region	North America · 34.7%
Fastest-growing region	Asia-Pacific · 7.2%
Market concentration	Moderate
Licence	Individual / Company

The global baler market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Replacement of aging hay equipment, farm consolidation and contractor demand for higher hourly throughput are shifting expenditure toward automated round balers, high-density large square balers and integrated baler-wrapper combinations. North America held XX% of global revenue in 2025, while Asia-Pacific is set to deliver the fastest regional growth at XX% through 2031. Connected controls, automatic steering, moisture and weight sensing, crop-flow optimization and lower-plastic binding systems are becoming central points of product differentiation.

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Executive summary

The global baler market reached USD XXX billion in 2025 and is forecast to expand to USD XXX billion by 2031, advancing at a XX% CAGR. Replacement of aging hay equipment, farm consolidation and contractor demand for higher hourly throughput are shifting expenditure toward automated round balers, high-density large square balers and integrated baler-wrapper combinations. North America held XX% of global revenue in 2025, while Asia-Pacific is set to deliver the fastest regional growth at XX% through 2031. Connected controls, automatic steering, moisture and weight sensing, crop-flow optimization and lower-plastic binding systems are becoming central points of product differentiation.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global baler market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Round balers accounted for XX% of 2025 market value, supported by their versatility across hay, silage and mixed livestock farms.
- Large square balers will record a XX% CAGR through 2031 as contractors and commercial forage operations prioritize transport density and hourly throughput.
- North America contributed XX% of global revenue in 2025, reflecting a large installed base, extensive hay acreage and high replacement expenditure.
- Asia-Pacific will expand at XX% annually through 2031 as China, India and Australia mechanize forage collection and commercialize dairy and livestock supply chains.
- Contractors and custom operators represented XX% of 2025 demand and form the fastest-growing end-user segment at a XX% CAGR.
- USDA estimated XXX acres of harvested hay in the United States during 2024, producing XXX tons of alfalfa and other hay.
- FAOSTAT reported XXX hectares of permanent meadows and pastures worldwide in 2023, sustaining a broad addressable forage-management base.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Baler Market Trends and Growth Drivers

The baler market sits at the intersection of livestock economics, forage agronomy and agricultural capital spending. Demand is shaped not simply by hectares harvested but by the number of cuts, bale density targets, weather windows, tractor availability and the commercial value of preserving forage quality.

The operating constraint is increasingly labor rather than machine capacity. Contractors and large farms are therefore paying for automatic steering, feed-rate regulation, blockage management, bale weighing and digital job records that allow less-experienced operators to deliver consistent output.

Regional market performance will remain uneven. Mature markets generate premium replacement revenue and early automation adoption, while developing markets contribute faster unit growth through contractor fleets, cooperatives and locally adapted lower-horsepower machines.

Growth drivers

Fleet replacement unlocks premium demand

A substantial installed base in North America and Western Europe is entering replacement windows after extended ownership cycles. Buyers are using replacement events to move toward wider pickups, heavier drivetrains, onboard weighing and connected controls, raising average transaction value alongside unit demand.

Livestock commercialization expands forage throughput

Larger dairy and beef operations require consistent forage quality, rapid field clearance and traceable bale inventories. This favors dependable high-capacity balers and integrated wrapping systems capable of protecting feed value across repeated seasonal cuts.

Custom contractors accelerate equipment intensity

Custom operators spread machine ownership costs across more hectares and can justify premium models through higher annual bale counts. Their purchasing criteria emphasize throughput, uptime, bale density and service response, directing market value toward large square and professional round balers.

Automation offsets skilled-labor shortages

Automatic steering, tractor-implement management, blockage response and hands-free bale ejection reduce operator workload during narrow harvesting windows. These systems also make bale shape and density less dependent on driver experience, strengthening adoption among contractors and multi-operator fleets.

High-density logistics improve forage economics

Dense, consistently formed bales increase truck payload, reduce storage-space requirements and simplify mechanical handling. The financial benefit is strongest for merchant hay, export forage and biomass supply chains, supporting demand for high-density square balers and onboard weighing.

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Crop-residue monetization broadens utilization

Cereal straw is increasingly collected for livestock bedding, feed supplementation, mushroom production, biomaterials and energy applications. Additional residue passes increase annual machine utilization and support dedicated contractor fleets in grain-producing regions.

Restraints

Premium equipment affordability pressure

High-density balers and baler-wrapper combinations require substantial upfront capital and appropriately powered tractors. Elevated borrowing costs and uncertain farm margins can extend replacement intervals or redirect buyers toward used equipment.

Weather volatility disrupts buying cycles

Drought lowers forage yield and bale counts, while persistent rainfall compresses workable harvest windows and can reduce crop quality. These swings affect contractor utilization, dealer inventories and farmers' willingness to commit capital in a given season.

Commodity and input-cost volatility

Changes in milk, beef, grain, fuel and fertilizer economics directly influence machinery budgets. Margin compression is particularly restrictive for smaller livestock farms, which frequently defer purchases or share equipment.

Service and interoperability gaps

Advanced balers depend on trained technicians, electronics diagnostics, hydraulic compatibility and reliable parts supply during short harvesting windows. Weak dealer density and mixed tractor fleets slow adoption of connected and tractor-implement automation in developing markets.

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Baler Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Fleet replacement unlocks premium demand	XXX	XXX	XXX
Livestock commercialization expands forage throughput	XXX	XXX	XXX
Custom contractors accelerate equipment intensity	XXX	XXX	XXX
Automation offsets skilled-labor shortages	XXX	XXX	XXX
High-density logistics improve forage economics	XXX	XXX	XXX
Crop-residue monetization broadens utilization	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Premium equipment affordability pressure	XXX	XXX	XXX
Weather volatility disrupts buying cycles	XXX	XXX	XXX
Commodity and input-cost volatility	XXX	XXX	XXX
Service and interoperability gaps	XXX	XXX	XXX

Source: XXX

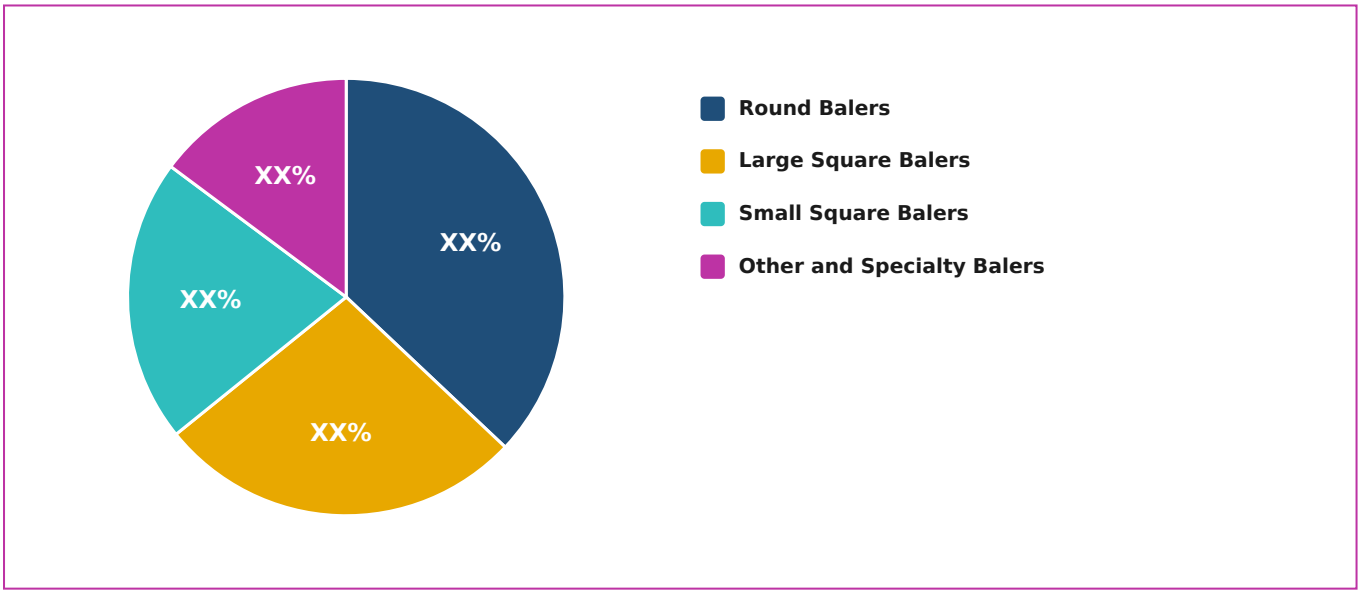
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Baler Market Segmentation by Format, Crop and End User

By Bale Format

Round balers dominate unit demand because they span livestock farms, mixed operations and contractors across a broad horsepower range. Large square balers command higher selling prices and are gaining share in merchant hay, export forage and crop-residue logistics where density and stackability lower transport costs. Small square balers retain durable demand among equine, specialty-hay and manual-handling users.

Value share by bale Format, 2025



Source: XXX

Value by bale Format, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Round Balers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Large Square Balers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Small Square Balers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other and Specialty Balers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Crop Material

Hay remains the largest material category because repeated cutting cycles support high annual machine utilization. Silage and wet forage are growing faster as dairy operations adopt chopped forage, film binding and integrated baler-wrapper systems to preserve feed quality. Straw demand benefits from bedding, feed, biomaterial and energy uses, while specialized residues create a smaller but expanding niche.

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Value by crop Material, USD bn

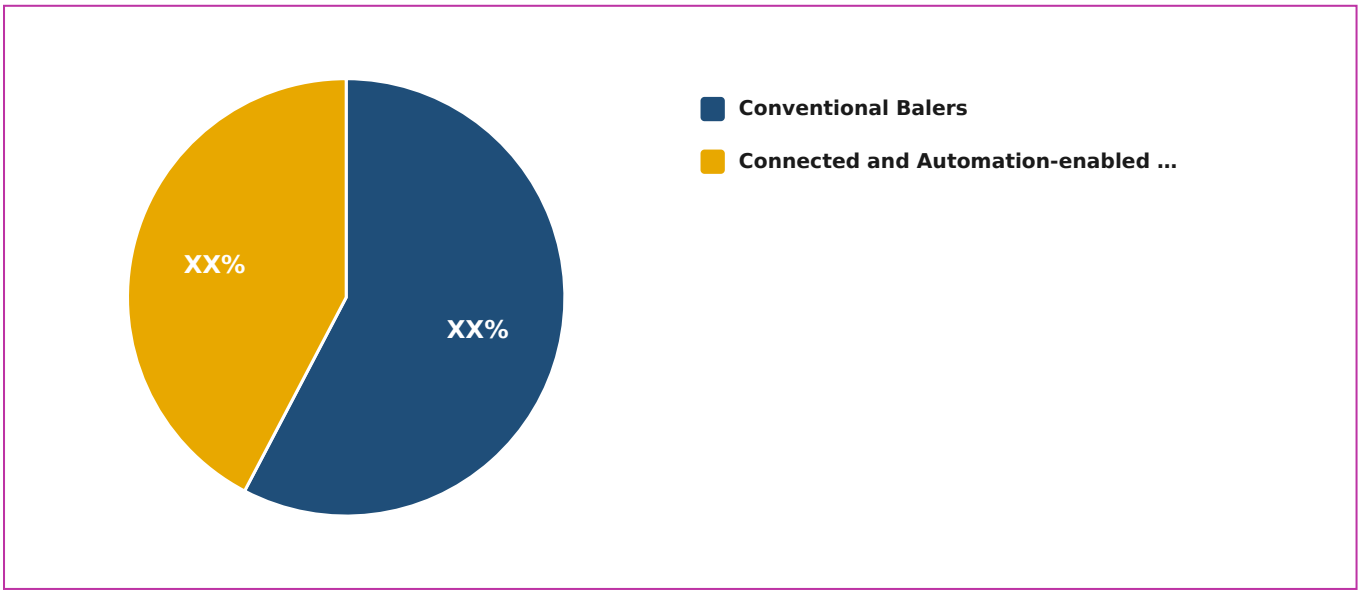
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Hay and Dry Forage	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Straw	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Silage and Wet Forage	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Crop Residues	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Technology Level

Conventional machines remain prevalent in price-sensitive and lower-utilization operations. Connected balers are rapidly gaining value share through ISOBUS control, bale mapping, moisture and weight monitoring, remote data transfer and tractor-implement management. Adoption is strongest in contractor fleets where job documentation and operator consistency translate directly into revenue and utilization.

Value share by technology Level, 2025



Source: XXX

Value by technology Level, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Conventional Balers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Connected and Automation-enabled Balers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End User

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Individual farms account for most machines, particularly round and small square balers, but purchase cycles are longer and sensitive to farm income. Contractors buy higher-capacity equipment, accumulate more annual hours and replace machines more frequently to protect uptime. Cooperatives and institutional users expand access to mechanization in fragmented farming regions through shared ownership and service models.

Value by end User, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Individual Farms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Contractors and Custom Operators	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cooperatives and Machinery Rings	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Institutional and Other Users	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Authorized dealers dominate due to the need for demonstrations, tractor matching, credit, delivery setup and emergency parts support. Direct manufacturer and key-account sales are more important for contractors and multi-unit fleets. Distributor and independent channels retain relevance in emerging markets, while digitally initiated purchases are increasing without displacing local fulfillment.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Authorized Dealers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct and Key-account Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Independent Channels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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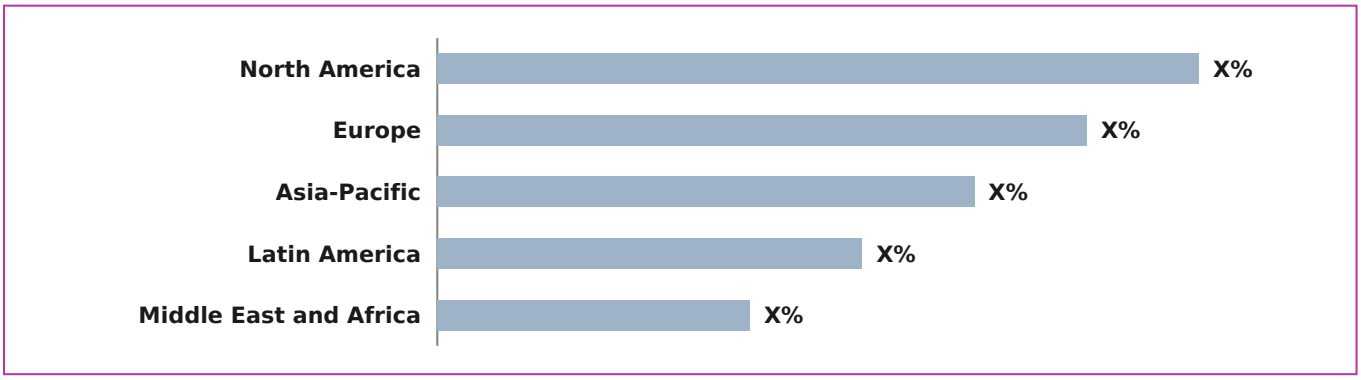
Baler Market Regional Analysis and Country Outlook

North America led the global baler market with XX% of 2025 revenue. The United States anchors demand through its extensive hay economy, large cattle and dairy sectors, established custom-harvesting industry and rapid uptake of tractor-implement automation. Canada adds demand from prairie straw, commercial hay and livestock operations, while Mexico is moving gradually from small square machines toward round balers in mechanizing livestock regions.

Europe represented XX% of 2025 value and remains the center of advanced baler engineering and export production. Germany and France combine strong domestic forage demand with major manufacturing bases, while the United Kingdom, Ireland, Italy and the Nordic markets support premium round baler and baler-wrapper adoption. Dense dealer networks and short, weather-sensitive harvest windows favor fast wrapping, crop-flow control and high-capacity machines.

Asia-Pacific is forecast to grow at XX% annually, the fastest regional rate. China and India are expanding from low-capacity and labor-intensive crop-residue collection toward mechanized baling, while Australia sustains premium large-square demand for commercial hay and export forage. Latin America gains from cattle, dairy and expanding commercial forage production in Brazil and Argentina; Middle East and Africa growth centers on imported hay logistics, irrigated dairy clusters and contractor-led mechanization.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Baler Market Competitive Landscape and Company Share

The market is moderately concentrated: Deere & Company, CNH Industrial, AGCO, CLAAS, KUHN and KRONE form the leading global group, while Kubota, Kverneland, SDF, McHale and several regional manufacturers compete through specialized formats and local price points. The leading companies combine broad product portfolios with financing, dealer service, captive parts distribution and integration into tractor and farm-data ecosystems.

Competition is shifting from chamber design and nominal throughput toward automated crop feeding, uniform density, bale-level traceability and reduced operator intervention. John Deere's connected next-generation round balers, New Holland's IntelliSense automation, KUHN's GPS-enabled baler automation and CLAAS's AI-supported CUBIX concept illustrate the direction of travel. Proprietary digital platforms can increase customer retention, but open ISOBUS compatibility remains necessary across mixed-brand fleets.

Capacity investment and platform renewal are reinforcing established manufacturers. CLAAS expanded assembly capacity at Metz-Woippy in January 2026 for CEREX and CUBIX production, while KRONE, KUHN, AGCO and CNH introduced new high-output, fine-cut or automated machines during 2025. Strategic advantage will increasingly depend on harvest-season uptime guarantees, remote diagnostics and demonstrable cost per tonne rather than equipment price alone.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Deere & Company	XXX	XXX	XXX	XXX
CNH Industrial N.V.	XXX	XXX	XXX	XXX
AGCO Corporation	XXX	XXX	XXX	XXX
CLAAS KGaA mbH	XXX	XXX	XXX	XXX
Maschinenfabrik Bernard KRONE GmbH & Co. KG	XXX	XXX	XXX	XXX
KUHN SAS	XXX	XXX	XXX	XXX
Kubota Corporation	XXX	XXX	XXX	XXX
McHale Engineering Ltd.	XXX	XXX	XXX	XXX

Source: XXX

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Baler Market Forecast, Technology Roadmap and Opportunities

The baler market will add USD XXX billion between 2025 and 2031. Baseline growth is supported by replacement demand in mature economies and first-time mechanization in developing markets, with revenue expanding faster than units as electronics, integrated wrappers and high-density systems lift equipment value.

Under a high-adoption scenario, faster contractor consolidation and broader tractor-implement management could take the 2031 market above USD XXX billion. A downside scenario combining prolonged weak farm income, expensive credit and adverse forage seasons would hold the market near USD XXX billion, with small farms extending replacement cycles most sharply.

Winning platforms will deliver more tonnes per labor hour while documenting bale weight, moisture, location and customer job data. Manufacturers able to pair those capabilities with durable pickups, rapid blockage clearance, low-plastic binding and dependable regional service networks will outperform the market.

Opportunities

- Autonomous tractor-baler coordination and sensor-based density control
- Compact and lower-horsepower balers for Asian and African smallholders
- Integrated baler-wrapper combinations for dairy and silage production
- Fleet telematics, yield mapping and contractor invoicing platforms
- Compostable net wrap and lower-plastic bale-binding systems
- High-density residue baling for biomass, biomaterials and renewable-energy feedstocks

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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