

Global Disc Harrow 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 2.2 bn
Forecast (2031)	USD 3.4 bn
CAGR (2021-2031)	7.5%
Study period	2021-2031
Largest region	Asia-Pacific · 31.6%
Fastest-growing region	Asia-Pacific · 8.9%
Market concentration	Moderate
Licence	Individual / Company

The global disc harrow market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Asia-Pacific led with XX% of global revenue, supported by mechanization programmes, replacement of basic tillage tools and expanding tractor ownership in India and Southeast Asia. Compact and high-speed disc harrows are the fastest-growing product class as commercial farms prioritize residue management, shallow tillage and fewer field passes. The market remains moderately fragmented, with global machinery groups competing against strong European specialists and regional manufacturers on durability, agronomic performance, dealer coverage and lifetime operating cost.

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Executive summary

The global disc harrow market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Asia-Pacific led with XX% of global revenue, supported by mechanization programmes, replacement of basic tillage tools and expanding tractor ownership in India and Southeast Asia. Compact and high-speed disc harrows are the fastest-growing product class as commercial farms prioritize residue management, shallow tillage and fewer field passes. The market remains moderately fragmented, with global machinery groups competing against strong European specialists and regional manufacturers on durability, agronomic performance, dealer coverage and lifetime operating cost.

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

Key findings

- The global disc harrow market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Asia-Pacific accounted for XX% of 2025 revenue and will expand at an XX% CAGR through 2031.
- Compact and high-speed disc harrows represented XX% of 2025 market value and are forecast to grow at XX% annually.
- Trailed machines held XX% of market value, reflecting higher selling prices and demand for wider implements on commercial farms.
- Machines with working widths above 3 metres and up to 6 metres formed the largest width class at XX% of 2025 revenue.
- FAO reported XXX hectares of global cropland in 2022, defining the long-term land base served by tillage-equipment suppliers.
- USDA counted XXX US farms operating XXX acres in 2022; average farm size increased XX% from 2017 to 463 acres.
- Eurostat recorded XXX hectares of utilised agricultural area and XXX farms in the European Union in 2020.

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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 Disc Harrow Market Trends and Growth Drivers

Disc harrow demand sits at the intersection of farm scale, tractor power, residue intensity and the number of workable field days. The implement remains a basic mechanization purchase in developing agricultural economies, while mature markets are shifting expenditure toward high-speed platforms that perform shallow cutting, mixing and consolidation in one pass.

Agronomic requirements are becoming more differentiated. High-residue maize systems need clearance, penetration and durable large discs; moisture-limited cereal regions prioritize shallow disturbance and low draft; and European weed-management programmes increasingly value full-width cutting at depths of only a few centimetres. This diversity supports modular frames, multiple disc profiles and soil-specific roller portfolios.

The purchase decision is increasingly evaluated through cost per hectare. Fuel demand, wearing-part life, hectares per hour, adjustment time and seasonal dealer support now carry as much weight as acquisition price, favouring suppliers that can demonstrate field performance and guarantee parts availability.

Growth drivers

Mechanization of emerging-market field preparation

Public support programmes, rural wage inflation and increasing tractor availability are moving farms from animal-drawn and basic rigid implements toward hydraulic mounted and trailed disc harrows. India, China, Southeast Asia and parts of Latin America provide the largest unit opportunity, with local manufacturers capturing entry-level demand and international suppliers addressing larger commercial holdings.

Higher residue loads require stronger incorporation

Improved crop genetics and higher maize, wheat and oilseed yields leave greater volumes of straw and stalks after harvest. Farmers are adopting larger serrated discs, wider frame clearance and knife-roller combinations to reduce blockage, accelerate decomposition and establish an even seedbed.

Reduced-pass tillage lowers cost per hectare

High-speed discs can combine cutting, mixing, levelling and reconsolidation in one pass, reducing labour hours and tractor use during short fieldwork windows. The value proposition is strongest for commercial farms and contractors that can spread acquisition cost across high annual acreage.

Farm consolidation supports wider implements

Larger operating units increasingly match high-horsepower tractors with trailed disc harrows above 6 metres. Wider equipment increases hectares covered per hour and supports controlled field logistics, lifting average selling prices and demand for hydraulic folding, transport brakes and advanced contour following.

Mechanical weed control gains strategic importance

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Herbicide resistance and tighter crop-protection practices are increasing interest in ultra-shallow full-width cultivation that stimulates or destroys volunteers and weeds. Closely spaced discs, wavy profiles and three-row configurations are creating a premium product niche around field hygiene.

In-cab adjustment and connected implement control

Hydraulic depth setting, section control, slope compensation and tractor-integrated guidance make disc harrows easier to configure across changing soils. These systems increase premium-equipment attachment rates and strengthen replacement demand among farms already using precision tractors.

Restraints

Capital intensity and tractor matching

Wide trailed harrows require substantial drawbar power, hydraulic capacity and ballast, which can force buyers to upgrade both implement and tractor. Smaller farms consequently retain older machines, choose narrow mounted models or use contractors.

Steel and wear-component cost exposure

Disc harrows contain heavy fabricated frames, hardened boron-steel discs, hubs and transport running gear. Changes in steel, energy, freight and bearing costs pass quickly into list prices and can compress dealer inventory appetite.

Competition from alternative tillage systems

No-till drills, strip-till equipment, vertical-tillage tools and multi-row tine cultivators compete for the same capital budget. In erosion-prone or moisture-limited areas, agronomic programmes that minimize soil movement can defer conventional disc-harrow replacement.

Farm-income and financing cyclicality

Implement purchases respond strongly to commodity prices, interest rates and expected cash receipts because farmers can extend the life of existing frames and replace wear parts. Downcycles primarily affect premium wide machines and independent manufacturers carrying finished inventory.

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Disc Harrow Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Mechanization of emerging-market field preparation	XXX	XXX	XXX
Higher residue loads require stronger incorporation	XXX	XXX	XXX
Reduced-pass tillage lowers cost per hectare	XXX	XXX	XXX
Farm consolidation supports wider implements	XXX	XXX	XXX
Mechanical weed control gains strategic importance	XXX	XXX	XXX
In-cab adjustment and connected implement control	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Capital intensity and tractor matching	XXX	XXX	XXX
Steel and wear-component cost exposure	XXX	XXX	XXX
Competition from alternative tillage systems	XXX	XXX	XXX
Farm-income and financing cyclicality	XXX	XXX	XXX

Source: XXX

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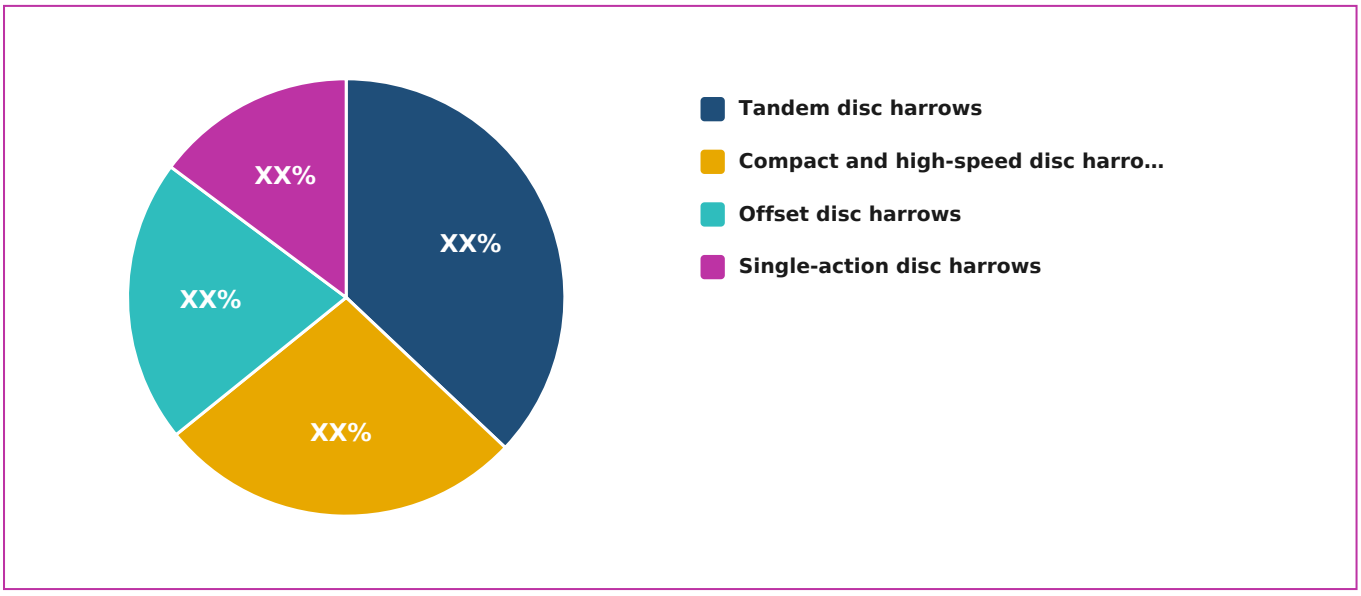
Disc Harrow Market Segmentation by Product, Mounting, Width, Application and End User

By Product Type

Tandem models retain the largest installed base and serve seedbed finishing, residue mixing and general-purpose tillage across a wide horsepower range. Compact and high-speed discs are gaining expenditure because individual disc suspension, higher operating speed and shallow full-width cutting reduce field passes. Offset machines remain important for aggressive primary tillage and land-opening applications, particularly in the Americas and emerging markets.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Tandem disc harrows	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Compact and high-speed disc harrows	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Offset disc harrows	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Single-action disc harrows	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Mounting Configuration

Mounted harrows dominate lower-power and small-field applications because they are compact, manoeuvrable and less expensive. Trailed machines lead value as commercial farms adopt wider frames,

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deeper disc packages and heavier rollers. Semi-mounted designs occupy a focused niche where operators require reduced rear-axle loading without the full cost and length of a conventional trailed platform.

Value by mounting Configuration, USD bn

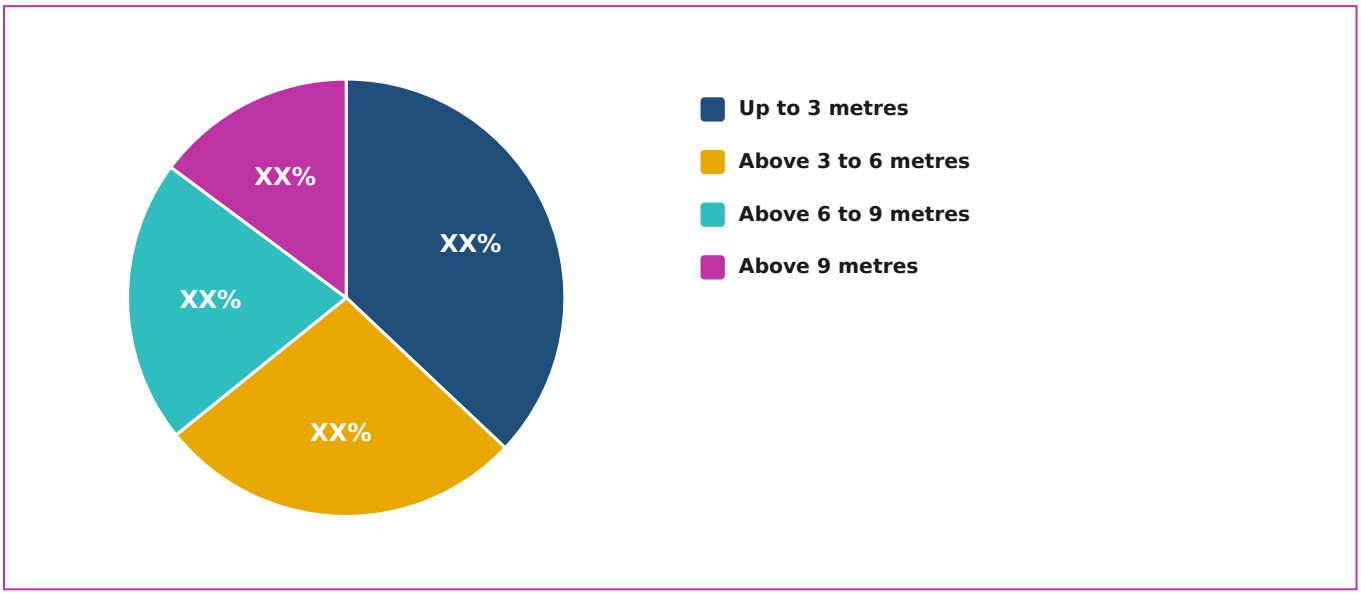
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Mounted	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Trailed	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Semi-mounted	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Working Width

Machines up to 3 metres serve compact tractors, small holdings, orchards and price-sensitive mechanization markets. The 3–6 metre category matches the broad global fleet of mid- and high-horsepower tractors and can be supplied as rigid, folding mounted or trailed equipment. Widths above 9 metres will post the fastest growth as contractors and large farms prioritize hectares per hour and controlled field logistics.

Value share by working Width, 2025



Source: XXX

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Value by working Width, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Up to 3 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 3 to 6 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 6 to 9 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Above 9 metres	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Stubble cultivation leads because disc harrows cut straw, stimulate volunteer germination and mix residues immediately after harvest. Primary tillage sustains demand for heavy offset, tandem and large-disc compact machines, while seedbed preparation supports lighter, closely spaced configurations with levelling rollers. Mechanical weed control and cover-crop termination will grow fastest as farms seek ultra-shallow full-surface cutting and reduced chemical dependence.

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Stubble cultivation and residue incorporation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Primary tillage	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Seedbed preparation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Mechanical weed control and cover-crop termination	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Orchards, vineyards and other applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By End User

Large farms purchase the widest and most highly configured machines and replace equipment on utilization-driven cycles. Medium farms form the core market for 3–6 metre mounted and trailed products, often using dealer finance to align payments with crop receipts. Contractors and cooperatives are expanding rapidly because shared utilization makes premium width, hydraulic adjustment and high-speed capability economical for smaller clients.

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Value by end User, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Large commercial farms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Medium farms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Small farms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Agricultural contractors and cooperatives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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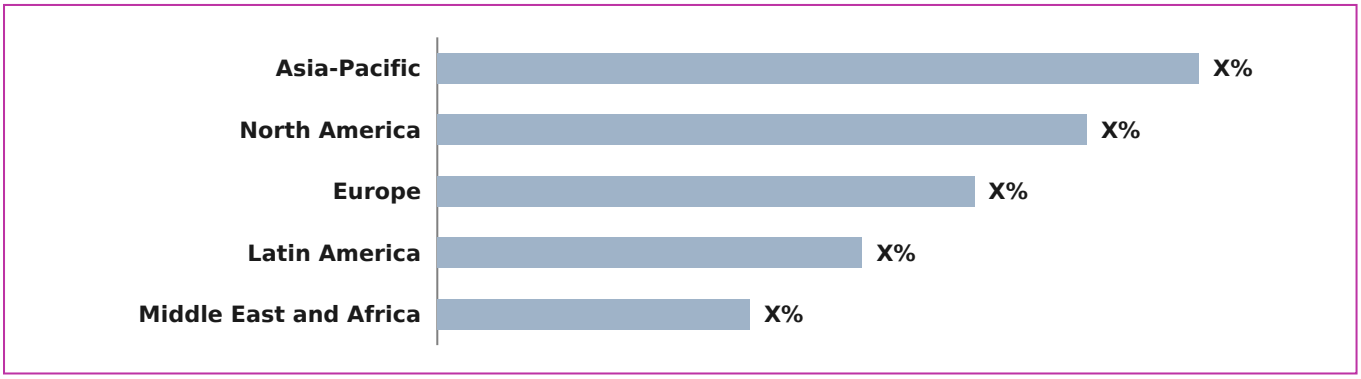
Disc Harrow Market Regional Analysis and Country Outlook

Asia-Pacific led the market with XX% of 2025 revenue and is forecast to advance at an XX% CAGR. China provides a large installed base of domestically produced mounted and trailed implements, while India is adding demand through tractor penetration, custom-hiring centres and public mechanization support. Australia contributes a smaller but premium market for wide, heavy-duty machines suited to extensive cereal and oilseed farms.

North America accounted for XX% of market value, supported by large farms, high tractor horsepower and rapid adoption of high-speed discs for maize and soybean residue. USDA's 2022 Census of Agriculture recorded XXX acres in farms and a 463-acre average farm size; the largest operations command a disproportionate share of machinery expenditure. Europe held XX%, with Germany, France, the United Kingdom and Eastern European cereal regions sustaining demand for compact discs, shallow cultivation and mechanically supported weed management.

Latin America is shaped by Brazilian and Argentine soybean, maize and sugarcane systems, where locally built offset and heavy tandem models remain important alongside premium European compact discs. The Middle East and Africa form the smallest regional market but offer targeted growth in South Africa, Türkiye and irrigated commercial-farming clusters. Dealer finance, local wear-part stocks and compatibility with established tractor fleets determine conversion across both regions.

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
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	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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Disc Harrow Market Competitive Landscape and Company Share

The global disc harrow market is moderately concentrated at the premium end and fragmented in entry-level equipment. Deere & Company, CNH Industrial, AGCO, KUHN, Kubota-group brands and leading European specialists compete through broad dealer networks, while Baldan, Tatu Marchesan, Mahindra and numerous domestic fabricators defend regional price points. The ten largest suppliers captured XX% of 2025 revenue.

Product leadership is shifting toward compact and high-speed platforms with individual disc suspension, maintenance-free hubs, hydraulic depth adjustment and configurable front tools or rollers. Väderstad's three-disc-row Carrier configurations, AMAZONE's wider Catros platform, HORSCH's revised Joker HD family and LEMKEN's deeper-working Rubin range illustrate the widening performance envelope between ultra-shallow weed control and intensive residue incorporation.

Competition increasingly centres on cost per hectare and uptime rather than list price. Global firms are integrating financing, connected tractor controls and standardized parts distribution, while specialists differentiate through disc geometry, contour following and soil-specific roller choices. Capacity investment remains focused on modular production and regional assembly because freight on wide, heavy frames materially affects delivered cost.

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
KUHN Group	XXX	XXX	XXX	XXX
Kubota Corporation	XXX	XXX	XXX	XXX
Väderstad AB	XXX	XXX	XXX	XXX
LEMKEN GmbH & Co. KG	XXX	XXX	XXX	XXX
AMAZONEN-WERKE H. DREYER SE & Co. KG	XXX	XXX	XXX	XXX
HORSCH Maschinen GmbH	XXX	XXX	XXX	XXX
Maschio Gaspardo S.p.A.	XXX	XXX	XXX	XXX

Source: XXX

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Disc Harrow Market Forecast, Technology Priorities and Opportunities

Market value will rise from USD XXX billion in 2025 to USD XXX billion in 2031. Compact and high-speed products will provide the largest incremental revenue pool, while conventional tandem and offset harrows will retain substantial demand in heavy primary tillage, emerging markets and mixed fleets. The market's centre of gravity will move toward machines capable of working effectively at several depths rather than single-purpose implements.

In the upside scenario, stronger crop receipts, lower financing costs and accelerated mechanization lift adoption of premium hydraulic and wide-frame products, taking the market above USD XXX billion by 2031. The downside scenario, defined by prolonged farm-margin pressure and weak machinery replacement, limits the market to approximately USD XXX billion. Replacement cycles, dealer inventory and commodity-linked farm cash flow will create more annual volatility than the structural forecast suggests.

Winning platforms will deliver full-width cutting at shallow depth, low draft per metre, stable transport geometry and rapid configuration for residue, seedbed and cover-crop tasks. Manufacturers should prioritize 3–6 metre modular families for global scale, retain locally priced narrow machines for mechanizing regions and build service propositions around discs, hubs and seasonal uptime.

Opportunities

- Compact disc harrows configured for ultra-shallow full-width cutting
- Locally manufactured 2–4 metre implements for emerging-market tractor classes
- Retrofit sensors and hydraulic depth-control packages
- Contractor-focused machines above 9 metres with controlled-traffic compatibility
- Integrated cover-crop seeding and slurry-incorporation systems
- Wear-part subscriptions, uptime guarantees and dealer-managed fleet services

> 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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