



RELEASE

Paris, January 10th 2025

Tractor registrations in France in 2024

39,198 tractors were registered for the first time in France in 2024. This is 5.8% less than in 2023. First registrations of green space tractors reached a record high in 2024. By contrast, registrations of vineyard and orchard tractors fell to their lowest level since 2010.

First registrations of agricultural tractors (including telescopic loaders) will fall by 5.8% compared with 2023, to 39,198 units. This is 2.4% below the average for the last four years. In 2024, the biggest percentage increase will be in green space tractors (+9.0%). The leading category, standard tractors, is down by 8.4% compared with 2023, while telescopic loaders are down slightly by 0.4% over the same period.

These results need to be qualified. Registration statistics for tractors and telescopic loaders have been affected by the new European regulations on agricultural vehicle braking, which come into force on ¹January 2025. This deadline prompted the industry to pre-register the tractors (or loaders) concerned before the end of the year.

The first farm tractor registrations (2020-2024)

Types of tractor	2020	2021	2022	2023	2024	Change 2024/ 2023	Change 2024/ Avg. 2020- 2023
Standard tractors	23 898	24 531	25 150	26 161	23 976	-8,4%	-3,8%
Green spaces tractors	4 464	6 606	6 056	6 166	6 718	+9,0%	+15,4%
Telescopic loaders	4 598	4 681	4 986	5 178	5 157	-0,4%	+6,1%
Tractors for vineyards and orchards	3 798	4 312	3 722	3 355	2 531	-24,6%	-33,3%
Other tractors *	654	725	859	752	816	+8,5%	+9,2%
Total farm tractors	37 412	40 855	40 773	41 612	39 198	-5,8%	-2,4%

(*) Vineyard straddlers, crawler tractors, articulated tractors, forestry tractors, tool-carrier tractors, wheel loaders and maize straddlers.

Source: Axema - DIVA / APS-SIV

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Standard tractors & vineyards and orchards :

A double-digit fall in the number of first-time registrations ;
a top three unchanged from 2023

For all standard, vineyard and orchard tractors, i.e. **26,507** tractors registered (-10.1% compared with 2023), the top 5 brands in 2024, in decreasing order of importance, are : John Deere (5,541 registered tractors, 20.9% market share), Fendt (4,223 registered tractors, 15.9% market share), New Holland (3,784 registered tractors, 14.3% market share), Massey Ferguson (2,778 registered tractors, 10.5% market share) and Claas (2,728 registered tractors, 10.3% market share). The three biggest gains in 2024 will go to Fendt (+2.4 pts market share), Massey Ferguson (+1.1 pt) and Case IH (+0.5 pt).

Breakdown of first registrations of standard tractors, vines and orchards by brand (2020-2024)

	2020	2021	2022	2023	2024
JOHN DEERE	19,9%	20,4%	22,2%	22,6%	20,9%
FENDT	14,5%	13,5%	14,0%	13,5%	15,9%
NEW HOLLAND	14,8%	15,2%	13,6%	15,2%	14,3%
MASSEY FERGUSON	9,8%	8,4%	10,1%	9,3%	10,5%
CLAAS	10,9%	10,5%	10,2%	10,2%	10,3%
CASE IH	7,9%	7,9%	7,6%	7,8%	8,3%
VALTRA	5,1%	5,5%	6,7%	6,6%	6,2%
DEUTZ-FAHR	5,2%	5,3%	4,5%	5,0%	4,9%
KUBOTA	5,4%	5,8%	4,9%	4,3%	4,3%
McCORMICK	1,2%	2,0%	1,7%	1,3%	1,1%
SAME	1,8%	1,7%	1,1%	1,2%	1,0%
LANDINI	1,1%	1,5%	1,4%	1,0%	0,6%
LAMBORGHINI	0,7%	0,6%	0,6%	0,6%	0,4%
ANTONIO CARRARO	0,4%	0,4%	0,4%	0,5%	0,4%
LINDNER	0,2%	0,2%	0,3%	0,3%	0,4%
OTHER BRANDS	1,1%	1,1%	0,7%	0,6%	0,5%

Source: Axema - DIVA / APS-SIV

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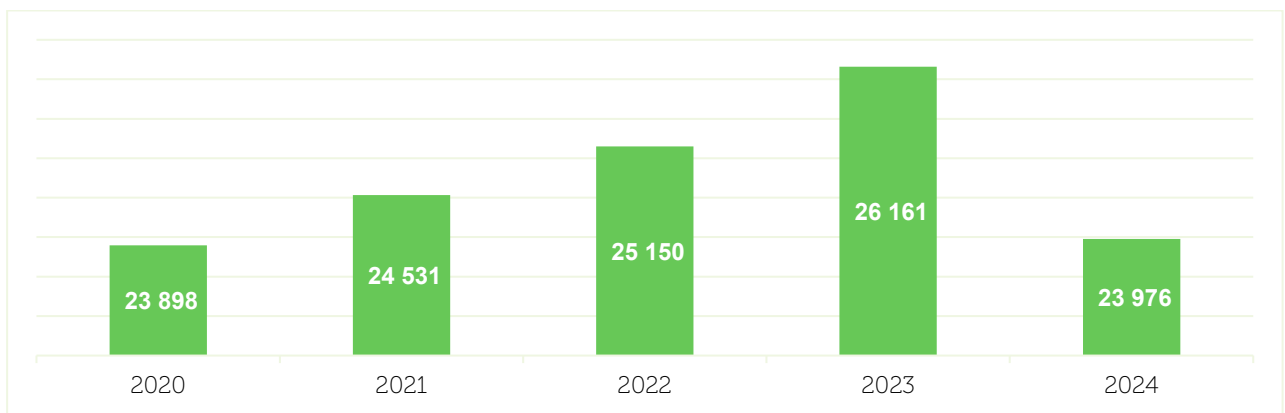


Standard tractors :

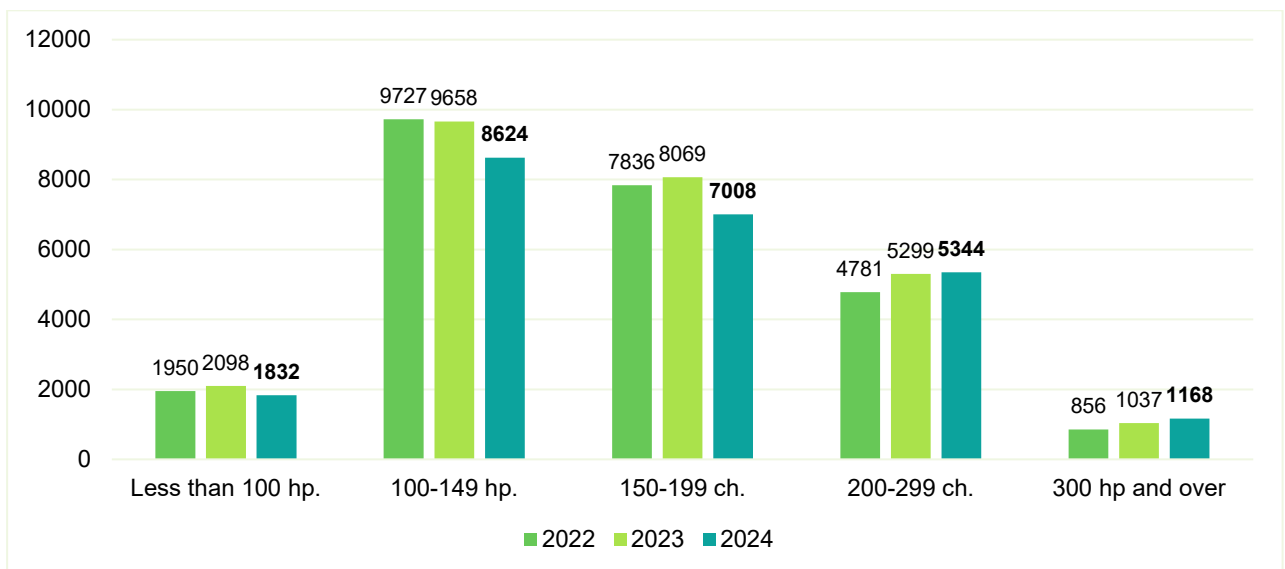
Overall decline in first-time registrations,
but an increase for tractors with 200 hp or more

First registrations of standard tractors will fall for the first time since 2020 (-8.4% in 2024) to 23,976 units. The average power of standard tractors continues to rise, reaching 169 hp in 2024 (compared with 163.5 hp in 2023). Of particular note is the strong growth in the number of tractors with more than 300 hp (+12.6%). The brand rankings have changed over the last 2 years. In 2024, John Deere will be on the podium, followed by Fendt and New Holland. Fendt (+2.8 pts), Massey Ferguson (+1.2 pt), Claas and McCormick (+0.2 pt each) are responsible for the biggest increases in market share.

Trend in first registrations of standard tractors (2020-2024)



Trend in first registrations by power band (2022-2024)



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Breakdown of first registrations of standard tractors by make (2020-2024)

	2020	2021	2022	2023	2024
JOHN DEERE	22,4%	23,4%	25,1%	25,1%	22,8%
FENDT	13,8%	13,2%	12,9%	12,8%	15,6%
NEW HOLLAND	14,2%	14,4%	13,6%	15,0%	13,6%
MASSEY FERGUSON	10,3%	8,7%	10,6%	9,6%	10,8%
CLAAS	11,7%	11,5%	10,7%	10,5%	10,7%
CASE IH	8,4%	8,2%	8,3%	8,5%	8,5%
VALTRA	5,9%	6,3%	7,6%	7,4%	6,7%
DEUTZ-FAHR	5,3%	5,3%	4,2%	4,6%	4,5%
KUBOTA	4,9%	5,4%	4,1%	4,1%	4,2%
McCORMICK	0,6%	1,1%	0,9%	0,8%	1,0%
LINDNER	0,2%	0,3%	0,3%	0,3%	0,4%
SAME	0,8%	0,6%	0,3%	0,3%	0,4%
JCB	0,4%	0,3%	0,3%	0,3%	0,3%
LAMBORGHINI	0,4%	0,3%	0,2%	0,3%	0,2%
LANDINI	0,2%	0,4%	0,3%	0,2%	0,2%
OTHER BRANDS	0,5%	0,6%	0,6%	0,2%	0,1%

Source: Axema - DIVA / APS-SIV

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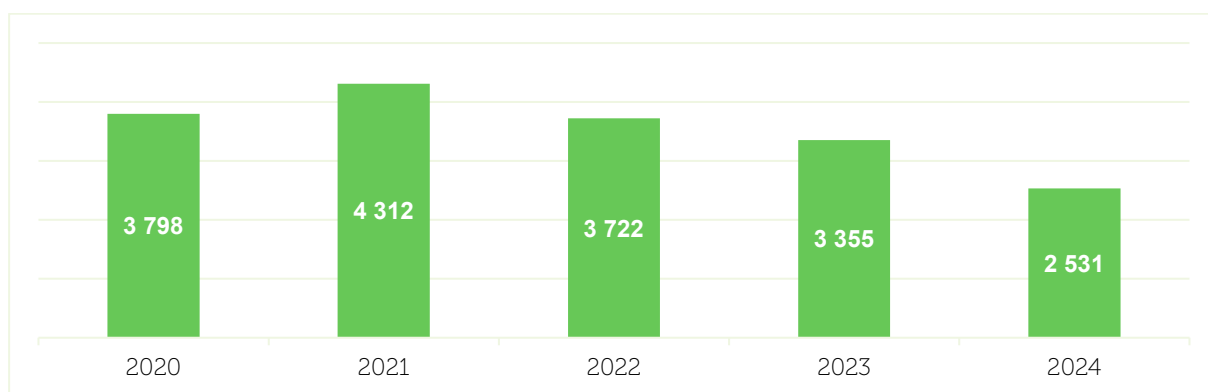


Tractors for vineyards and orchards :

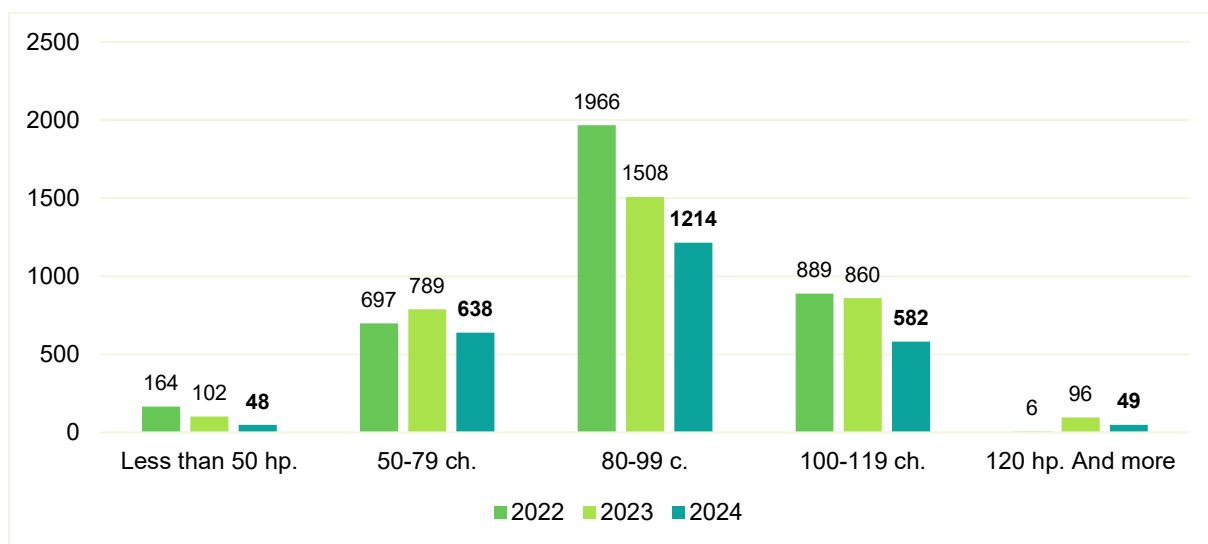
Annus horribilis for vineyard and orchard tractors in 2024!

First registrations of vineyard and orchard tractors fell sharply for the third year running, to their lowest level in ten years. In 2024, average power remained stable at 89.1 hp. In a shrinking market, the redistribution of market share is strong. New Holland and Fendt hold the top 2 places, with 20.7% and 19.2% of first registrations respectively. Deutz-Fahr consolidated its third place. The biggest increases in market share in 2024 will come from New Holland (+3.8 pts), Case IH (+3.6 pts) and Deutz-Fahr (+0.8 pt).

Trend in first registrations of vineyard and orchard tractors (2020-2024)



Trend in first registrations by power band (2022-2024)



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Breakdown of first registrations of vineyard and orchard tractors by brand (2020-2024)

	2020	2021	2022	2023	2024
NEW HOLLAND	18,4%	19,9%	13,9%	16,9%	20,7%
FENDT	19,4%	15,5%	21,0%	18,5%	19,2%
DEUTZ-FAHR	4,6%	5,3%	5,9%	8,3%	9,1%
MASSEY FERGUSON	7,1%	6,7%	6,5%	7,2%	7,2%
SAME	7,9%	7,6%	6,4%	7,5%	6,8%
CLAAS	6,0%	4,9%	6,6%	7,8%	6,3%
CASE IH	4,5%	6,0%	2,8%	2,5%	6,0%
KUBOTA	8,0%	7,8%	9,8%	5,6%	5,4%
LANDINI	6,8%	7,8%	8,8%	7,6%	4,6%
ANTONIO CARRARO	3,7%	3,7%	4,1%	4,8%	4,4%
JOHN DEERE	4,1%	3,1%	2,7%	3,0%	3,0%
McCORMICK	5,0%	7,1%	7,0%	5,2%	2,9%
LAMBORGHINI	2,6%	2,2%	3,1%	3,6%	2,4%
VALTRA	0,4%	0,8%	0,8%	0,4%	0,9%
OTHER BRANDS	1,5%	1,6%	0,6%	1,1%	1,1%

Source: Axema - DIVA / APS-SIV

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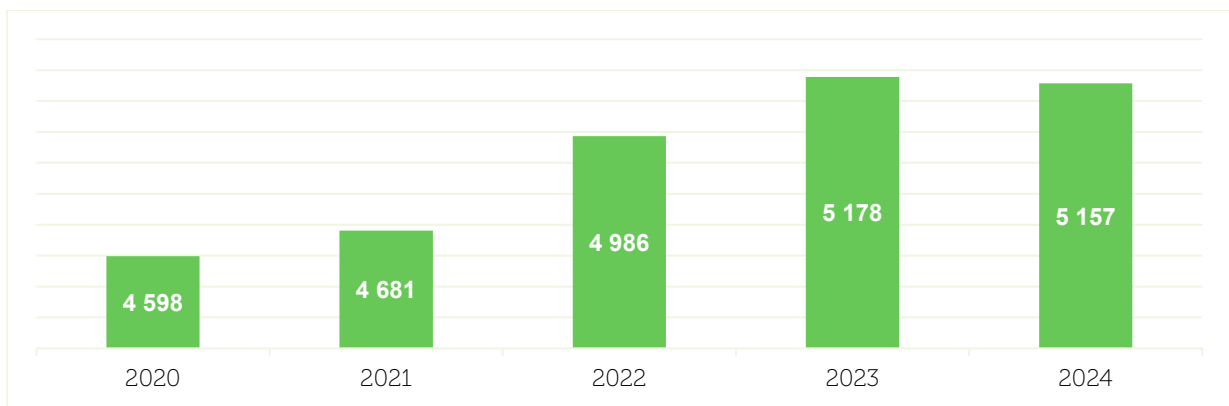


Telescopic loaders :

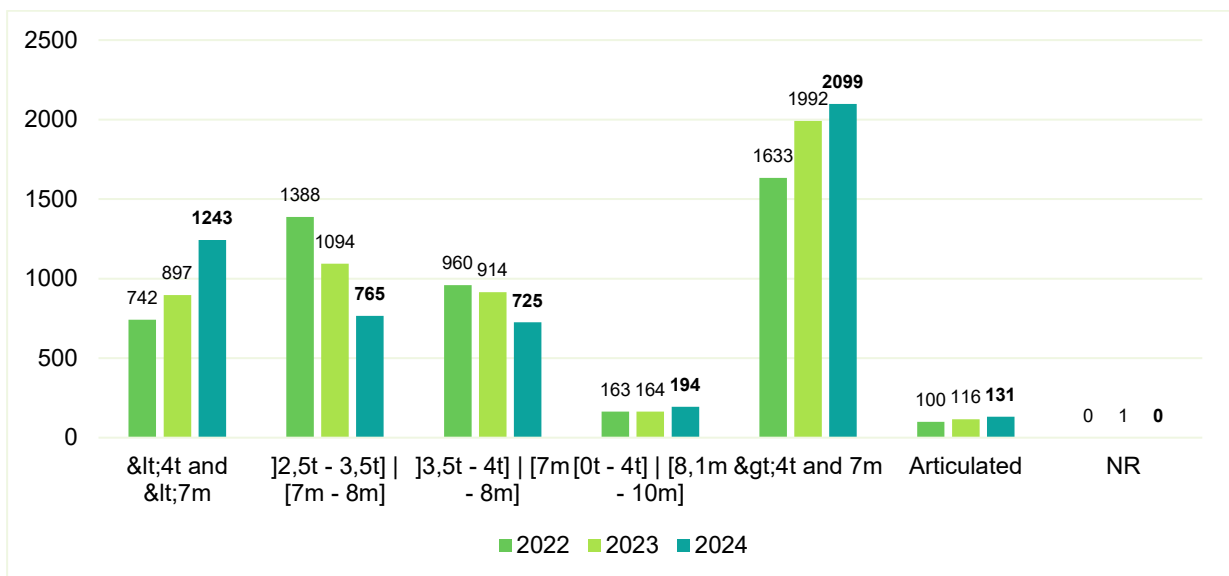
The first 5,000 registrations milestone has been passed for the second year running and for the third time since 2010

First registrations of telescopic loaders have again passed the 5,000-unit mark, for the third time since 2010. However, first registrations of telescopic loaders fell slightly over the year as a whole, by 0.4%. The best performance was seen in the category of loaders over 4 tonnes and 7 metres. The brand rankings remain unchanged in the top 4. Manitou (26.4% of first registrations), JCB (22.4%) and Merlo (15.6%) take the top three places. The three biggest increases in market share in 2024 will go to Weidemann (+3.7 pts), Merlo (+2.8 pts) and Kramer (+1.3 pt).

Trend in first registrations of telescopic loaders (2020-2024)



Trend in first registrations by segmentation category (2022-2024)



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Breakdown of first registrations of telescopic loaders by brand (2020-2024)

	2020	2021	2022	2023	2024
MANITOU	32,2%	31,0%	31,5%	30,9%	26,4%
JCB	26,7%	27,8%	27,4%	25,8%	22,4%
MERLO	15,1%	12,6%	13,2%	12,8%	15,6%
KRAMER	5,9%	8,6%	8,0%	10,6%	11,8%
WEIDEMANN	0,2%	0,1%	0,1%	1,7%	5,4%
BOBCAT	3,9%	5,7%	5,8%	5,6%	5,1%
CLAAS	4,7%	4,6%	4,8%	3,5%	3,8%
MASSEY FERGUSON	3,2%	2,9%	3,3%	3,7%	3,0%
NEW HOLLAND	3,1%	2,7%	2,9%	2,2%	3,0%
DIECI	1,3%	1,0%	1,4%	1,6%	1,8%
CASE IH	0,7%	0,9%	0,6%	0,7%	0,8%
KUBOTA	0,2%	0,4%	0,4%	0,3%	0,3%
SCHAFFER	0,3%	0,5%	0,2%	0,5%	0,3%
FENDT	0,0%	0,0%	0,0%	0,0%	0,1%
OTHER BRANDS	2,5%	1,2%	0,4%	0,1%	0,2%

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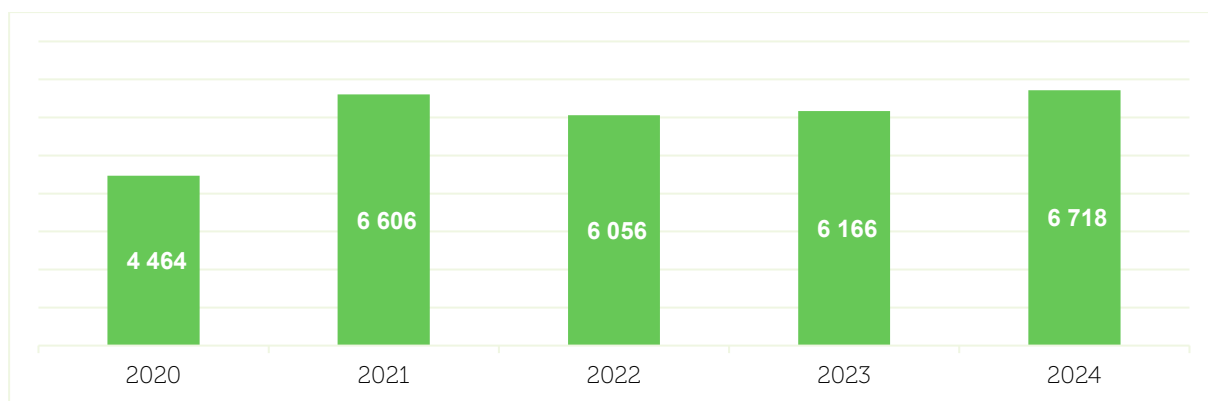


Green spaces tractors :

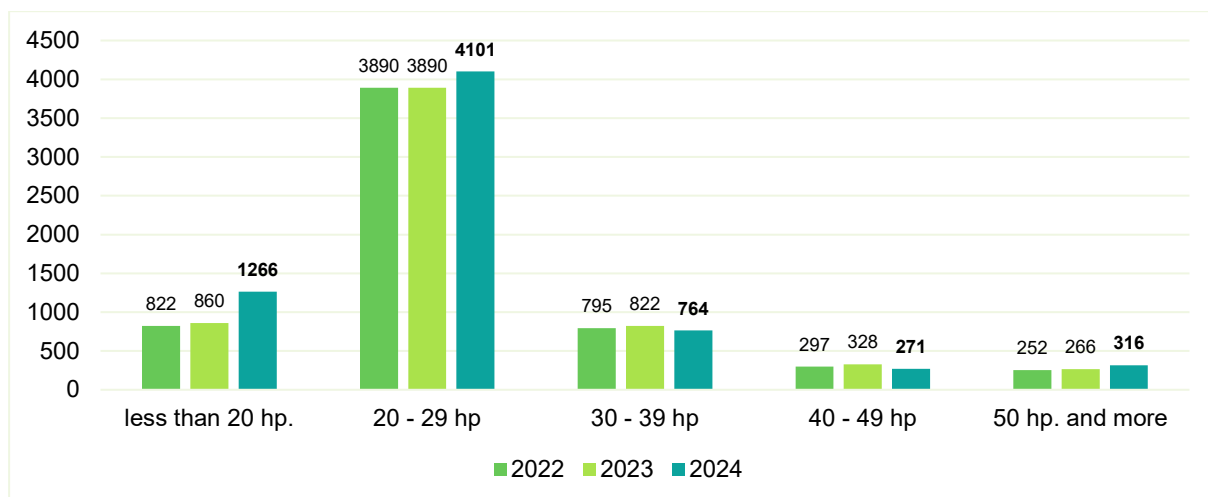
A record number of first-time registrations in 2024!

First-time registrations of green space tractors rose by 9% in 2024, to 6,718 units. This is the highest total ever, apart from 2017, which was marked by an artificial boom in registrations linked to the change in engine standards. The structure of registrations by power band has changed little in recent years. Tractors in the 20-29 hp range form the core of the market, accounting for 61% of first registrations in 2024. In 2024, 32 brands registered at least one green spaces tractor in France. The top three players accounted for 68.6% of first registrations. Kubota retained its top spot, followed by Iseki and Solis in third place. The biggest increases in market share in 2024 went to Iseki (+7.0 pts), Lihai (+1.1 pt) and Escorts Kubota Limited, a new entrant to the market which registered 32 tractors in 2024 (0.5% of total first registrations).

Growth in first registrations of green space tractors (2020-2024)



Trend in first registrations by power band (2022-2024)



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Breakdown of first registrations of green space tractors by brand (2020-2024)

	2020	2021	2022	2023	2024
KUBOTA	27,6%	23,8%	19,9%	25,3%	24,3%
ISEKI	17,2%	17,9%	16,9%	16,1%	23,1%
SOLIS	18,3%	23,6%	26,2%	23,0%	21,1%
FARMTRAC	5,0%	5,7%	7,4%	9,5%	7,8%
JOHN DEERE	13,5%	9,8%	10,0%	8,2%	7,6%
KIOTI	7,9%	7,1%	7,2%	7,0%	5,5%
VST TILLERS	3,2%	3,7%	4,9%	3,5%	2,2%
LINHAI	0,6%	0,2%	0,1%	0,1%	1,2%
CAPTAIN	0,0%	0,0%	0,9%	0,7%	0,9%
YANMAR	0,3%	0,7%	1,0%	1,3%	0,9%
OTHER BRANDS	6,4%	7,5%	5,5%	5,3%	5,4%

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