

Potato Harvesting Machinery Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Indoor Farming & Farm Mechanization (Agriculture & Agribusiness)

> **Source:** <https://www.mordorintelligence.com/industry-reports/potato-harvesting-machinery-market>

> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 2.53 billion
Projected Forecast (2031)	USD 2.53 billion
Growth Rate (CAGR)	5.84 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Potato Harvesting Machinery industry](images/chart_2.png)

! [Potato Harvesting Machinery Market (2026 - 2031)](images/chart_3.png)

! [Potato Harvesting Machinery Market: Market Share by Machine Type](images/chart_4.png)

! [Potato Harvesting Machinery Market: Market Share by Farm Scale](images/chart_5.png)

! [Potato Harvesting Machinery Market CAGR (%), Growth Rate by Region](images/chart_6.png)

! [Potato Harvesting Machinery Market Concentration](images/chart_7.png)

! [Icon](images/chart_8.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2021 - 2031
Market Size (2026)	USD 2.53 Billion
Market Size (2031)	USD 3.36 Billion
Growth Rate (2026 - 2031)	5.84 %

Fastest Growing Market | Asia-Pacific |
Largest Market | Europe |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Potato Harvesting Machinery Market Analysis by Mordor IntelligenceThe potato harvesting machinery market is valued at USD 2.39 billion in 2025 and is anticipated to grow from USD 2.53 billion in 2026 to USD 3.36 billion by 2031, registering a CAGR of 5.84% through 2026-2031. This growth is driven by farm labor shortages, the expansion of processed-potato supply chains, and the adoption of GPS-enabled and connected machinery, which enhance field precision and reduce reliance on operator judgment. With global potato production reaching 390 million metric tons across 17.1 million harvested hectares in 2024, the market benefits from a substantial crop base reliant on efficient, low-damage mechanical harvesting systems. Europe, holding the largest regional market share, underscores the demand for advanced machinery. However, challenges such as the high cost of premium machines exceeding EUR 400,000 (USD 432,000), limited-service capacity outside core markets, and weather-related disruptions in major production regions underscore the need for cost-effective, resilient solutions to sustain growth and ensure consistent harvest quality.

Key Report Takeaways

- * By machine type, self-propelled harvesters held the largest 49.0% of the potato harvesting machinery market share in 2025, while trailed harvesters are the fastest-growing segment at a 6.5% CAGR during 2026-2031.
- * By automation level, conventional harvesters remained the largest segment, with a 65% market share of the potato harvesting machinery market in 2025, while GPS-enabled and connected harvesters are the fastest-growing segment at a 7.8% CAGR during 2026-2031.
- * By farm scale, Large commercial farms accounted for 58% of the potato harvesting machinery market share in 2025 and are gaining momentum with the fastest 6.2% CAGR through 2026-2031.
- * By geography, Europe held the largest share, accounting for 35.0% of the potato harvesting machinery market in 2025, while Asia-Pacific is the fastest-growing region, with a 6.8% CAGR during 2026-2031.

Key Market Trends

Global Potato Harvesting Machinery Market Trends and InsightsDrivers Impact Analysis*

Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline

- Farm labor scarcity and rising seasonal wages | +1.4% | Global, with the strongest pressure in North America and Europe, where labor dependence and wage levels are high | Short term (≤ 2 years) |
- Precision harvesting and smart-machine upgrades | +1.2% | North America and Europe first, with adoption widening across the Asia-Pacific and South America | Medium term (2-4 years) |
- Processed-potato demand raises harvest quality requirements | +1.1% | Global, with the highest pull from North America, Europe, and emerging Asia-Pacific processing hubs | Medium term (2-4 years) |
- Mechanization subsidies and modernization programs | +0.9% | Asia-Pacific core, with wider influence across South America and Africa, where affordability remains a barrier | Short term (≤ 2 years) to Medium term (2-4 years) |

Processor contract penalties for bruising and foreign material | +0.8% | North America and Europe first, with growing relevance in the Asia-Pacific processor corridors | Medium term (2-4 years) |
Weather-compressed harvest windows favoring high-capacity machines | +0.8% | Europe and North America first, with rising relevance in South America | Medium term (2-4 years) to Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The potato harvesting machinery market is moderately concentrated, with the top five players capturing a significant share of 2025 revenue, while the remaining players are fragmented among regional and specialized manufacturers. This fragmentation is prominent in regions such as Poland, the Netherlands, Spain, and North America, where smaller suppliers compete on price, local dealer support, and adaptability to specific field conditions. GRIMME Group leads globally, operating in over 120 countries with a portfolio of more than 150 machine types, while AVR BV and Dewulf Group have shown notable sales growth. This structure highlights a market led by strong global players but with opportunities for local brands to compete through proximity, service, and tailored solutions.

Competition is increasingly driven by connected systems, cleaning performance, and operator support rather than traditional factors such as engine power or row width. In 2025, GRIMME Group launched the updated two-row VARITRON line with advanced digital features, including the CCI 1200 terminal and SmartView support for up to 13 cameras. In October 2025, Dewulf Group introduced Level X with IoT monitoring and autonomous adjustment capabilities, while AVR BV unveiled the fifth-generation Puma with enhanced telematics and performance upgrades. These advancements underline a shift toward software-enabled field control and data-driven adaptability, emphasizing the growing importance of technology in maintaining competitive advantage.

Despite the dominance of established European brands, opportunities remain in emerging markets and underserved segments. Medium-scale farms in India and Southeast Asia require affordable one-row and two-row solutions, while aging fleets in Eastern Europe and South America drive demand for cost-effective digital upgrades. Additionally, integrating harvester data with storage and processing systems presents untapped potential as field data becomes increasingly valuable. While Asia-Pacific manufacturers such as Shandong Transce Agricultural Machinery Technology Co., Ltd. compete on price, established players retain an edge through compliance, dealer support, and reliability. Ultimately, the market remains open to new entrants, as buyers prioritize local agronomic fit and support quality, reinforcing the balance between global leadership and localized competition.

Potato Harvesting Machinery Industry Leaders* GRIMME Group

* AVR BV

* Dewulf Group

* Lockwood Manufacturing

* Oxbo

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Potato Harvesting Machinery Market Report Scope Potato harvesting machinery

y refers to specialized agricultural equipment designed to automate the lifting, cleaning, and collection of potato tubers from the soil. These machines minimize manual labor by separating potatoes from dirt, vines, and debris while protecting the crop from mechanical bruising.

The potato harvesting machinery market report is segmented by machine type (self-propelled harvesters, trailed harvesters, and mounted harvesters), by automation level (conventional harvesters, automated harvesters, and GPS-enabled and connected harvesters), by farm scale (small farms, medium farms, and large commercial farms), and by geography (North America, South America, Europe, Asia-Pacific, Middle East, and Africa). The market forecasts are provided in terms of value (USD).

By Machine Type
Self-propelled harvesters |
Trailed harvesters |
Mounted harvesters |

Segmentation Accordion Item

By Geography
North America | United States |
| Canada |
| Mexico |
| Rest of North America |
South America | Brazil |
| Argentina |
| Rest of South America |
Europe | Germany |
| France |
| United Kingdom |
| Netherlands |
| Russia |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| Australia |
| Rest of Asia-Pacific |
Middle East | Turkey |
| Saudi Arabia |
| Rest of Middle East |
Africa | South Africa |
| Egypt |
| Rest of Africa |

Frequently Asked Questions

What is the current outlook for potato harvesting machinery through 2031?

The potato harvesting machinery market is valued at USD 2.53 billion in 2026 and is anticipated to reach USD 3.36 billion by 2031, growing at 5.84% CAGR during 2026-2031.

Which machine type leads global revenue?

Self-Propelled Harvesters accounted for the largest share of revenue in 2025, at 49.0%, as they meet the needs of commercial farms and contractors during narrow harvest windows.

Which automation category is expanding the fastest?

GPS-Enabled and Connected Harvesters are the fastest-growing segment, with a 7.8% CAGR during 2026-2031, as buyers place greater value on machine data, field tr

aceability, and real-time adjustment.

Why are processors influencing equipment purchases more strongly now?

Processor contracts are placing greater emphasis on bruising, foreign material, and quality consistency, so growers are choosing machines that protect tuber condition while maintaining throughput.

Which region offers the strongest growth potential?

Asia-Pacific is the fastest-growing region, with a 6.8% CAGR during 2026-2031, as China and India together account for 39% of global potato production and still have room for mechanization gains.