



THE STATE OF THE INDUSTRY 2022 Tractors and Machinery Report



TMA

TRACTOR AND
MACHINERY
ASSOCIATION
OF AUSTRALIA



March 2023

PREPARED BY KYNETEC AUSTRALIA



INDUSTRIAL AUCTIONS



DRIVING SUCCESS THROUGH LEADING REMARKETING SOLUTIONS

SPECIALISTS IN...

- Asset Management
- Plant and Machinery
- Agricultural Equipment
- Aircraft
- Construction Equipment
- Earthmoving Equipment
- Marine Vessels
- Mining Equipment
- Transport Equipment
- WH&S
- On-Site Auctions
- Clearing Sales
- Valuations

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Welcome

On behalf of the Board of the Tractor and Machinery Association of Australia I would like to welcome you to this year's edition of the State of The Industry Report.

The State of The Industry Report has been a focal point for our industry for many years. This year's report is the first produced by Kynetec, the new owners of Agriview and you will notice a considerable change to the format.

The aim is to provide the data in an easy to read summary format and we trust that you find this year's report to be a valuable resource for your business.

2022 was another unique year as the strong demand from customer groups combined with the ongoing support provided by the Federal Government's Temporary Full Expensing program drove the industry to new highs.

Our Industry continues to face many challenges and the combined strength of our OEM's, Manufacturers, Importers, Dealers and Affiliates is vital to ensuring the ongoing prosperity of Agriculture in this country.

Just a reminder that the team from Agriview will be at this year's annual conference to provide a mid-year update so we encourage you to attend.

The event is being held at:

Stamford Plaza Sydney Airport on Wednesday July 19th.

The theme for this year's event is "Towards 2030" – Building for the Long haul and we look forward to a range of speakers who will both enlighten and educate us.

As always, we thank you for your ongoing support and look forward to a prosperous 2023.

Gary Northover

**Executive Director
Tractor & Machinery Association of Australia**

2022 – Agricultural Machinery Industry New Sales



\$5.6bn

Tractors
\$2.1bn

Combine Harvesters
& Headers
\$1bn

Balers, Hay tools
and Windrowers
\$220m

SP Sprayers
\$690
(est.)

Tillage & Seeding
\$460
(est.)

Other Equip.
\$1.1bn
(est.)

2022 – Agricultural Machinery Industry New Sales

2022 has continued the strong growth, reaching an estimated total sales value of \$5.6 bn – an increase of approximately 9% overall.

Demand for new tractors remained stable, rising just 3%. This increase remained constant for the value too, with an increase of 3% on the previous year and growing to \$2.1bn. Overall, the growth in units has come through the lifestyle less than 60HP range – increasing by 10.8%. The driver for value growth has come through the 200+ HP range – increasing 6.2 % or \$64mil.



The value of Combine Harvester and Header sales increased by approximately 10% with \$1bn worth of new machines sold – this is on the back of last years massive growth. Class 10 is increasing in popularity, with the class 8 to 10 now being 83% of all combines sold, and class 9 and 10 now being 34% of the total sold.

Hay and Forage equipment sales have continued to decline on the 2021 results, and are nowhere near the record 2020 sales. Sales of Balers, Hay Tools and Windrowers totalled \$220mil.

Baler sales decreased 30% to \$83mil this year. Unlike last year where the decline in demand was driven by a 52% drop in Large Square baler sales, this year all baler types have declined between 32% and 38%.

Hay Tool sales have also declined further in 2022 with just over \$100 million sold, and a 0.2% decrease on last year. Unlike last year, which saw a decline in all machine types, some machinery did increase – such as bale wrappers and forage mixers, however the larger value items remained static and the decline in wagons could not be offset by the growth seen.

Windrowers have made a comeback this year, with an increase in value of 86% up to \$25mil. A total of 88 units were sold, which is up 7% on the 5 year average.

While data is not reported, the industry feeling is the self-propelled Sprayer market saw growth in both units and value, with the overall impact seeing sales now worth an estimated \$690mil.

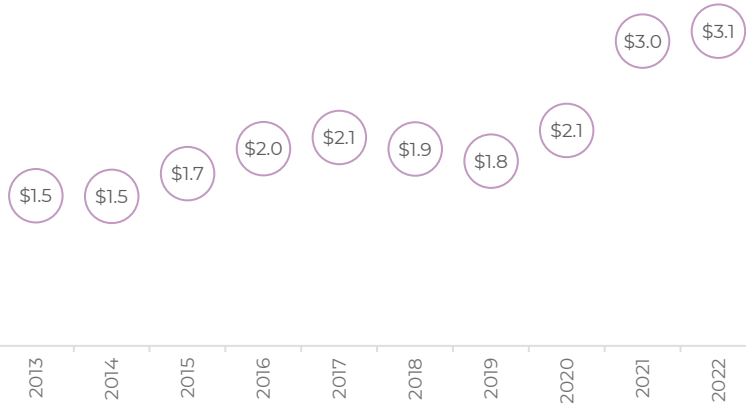
The Tillage and Seeding Machinery market also improved. Sales are estimated to have reached \$460mil, from a nice steady rise in both units and value.

We continue to provide our estimates on the combined value of sales of other key segments including Trailed Sprays, Cotton and Cane Harvesters, Self-propelled Forage Harvesters, Chaser and Hall Out Bins to just name a few. Industry feeling is this has grown to an estimated \$1.1bn.

Value of Sales – Tractors, Combines & Balers



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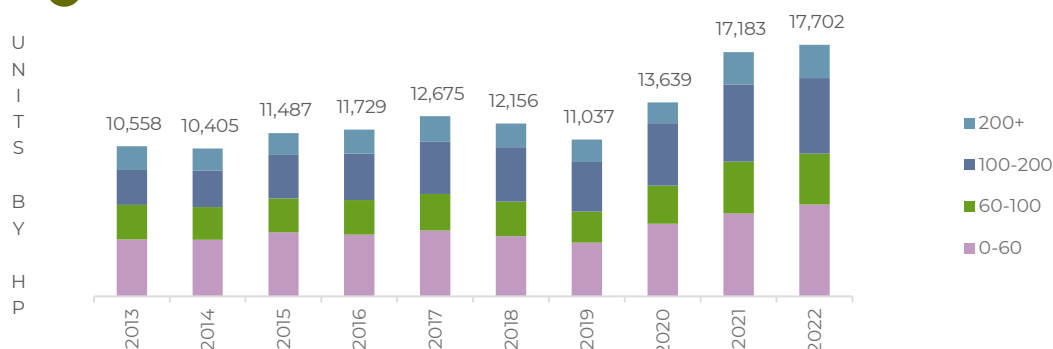


Tractors

Units by HP range



17,702 units ↑ 3% on 2021 ↑ 33% on 5yr avg
\$2.1 bill ↑ 3% on 2021 ↑ 41% on 5yr avg

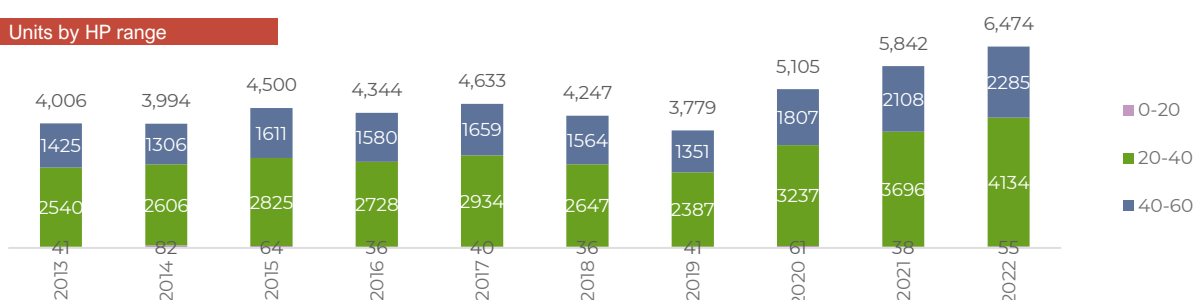


Lifestyle Tractors – up to 60 HP

\$/HP and Avg HP

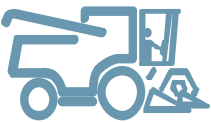


Units by HP range

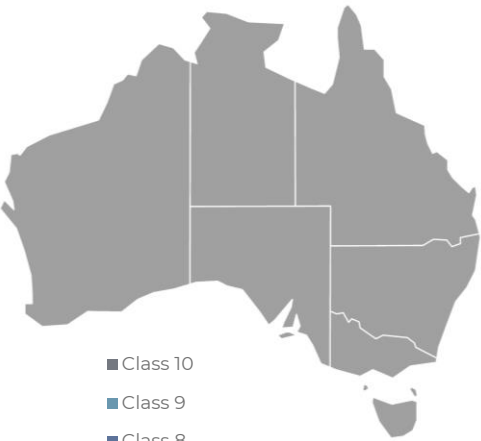


Combines

Units by class



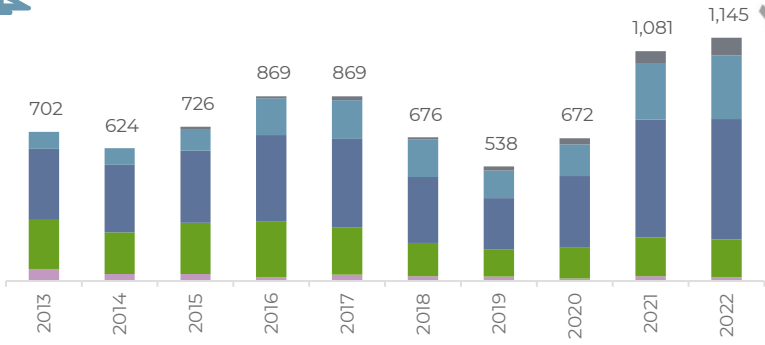
1,145 units ↑ 6% on 2021 ↑ 49% on 5yr avg
\$878 mill ↑ 10% on 2021 ↑ 63% on 5yr avg



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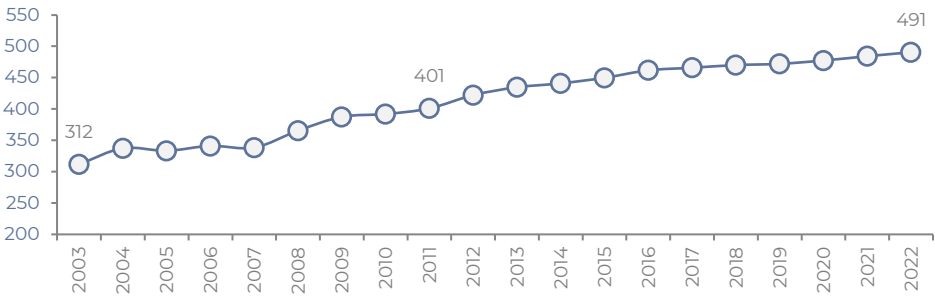


- Class 10
- Class 9
- Class 8
- Class 7
- Class 6

Class distribution by year



Average Unit HP

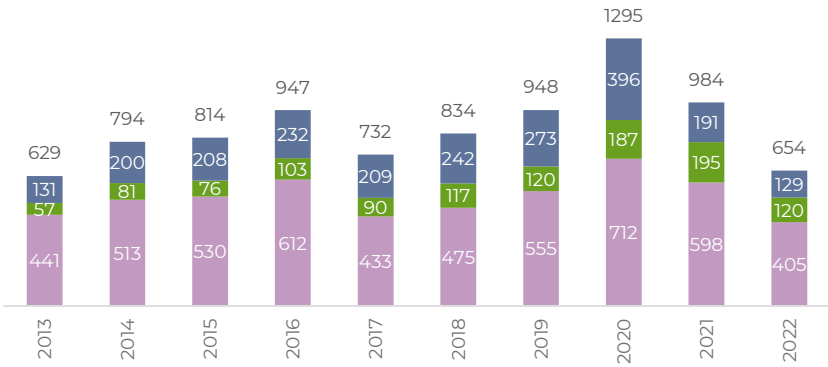


Balers

Balers units by type



654 units ↓ 34% on 2021 ↓ 32% on 5yr avg
\$83 mill ↓ 30% on 2021 ↓ 36% on 5yr avg



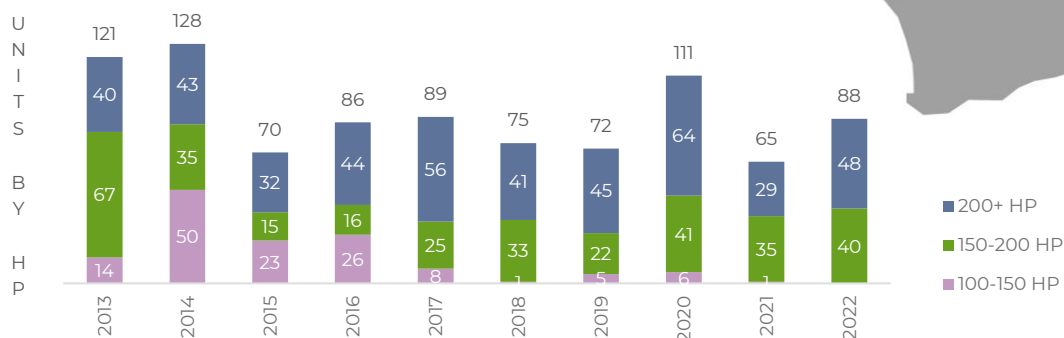
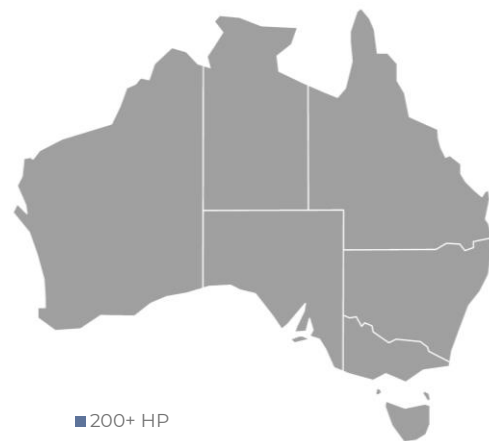
- Large Rect
- Small Rect
- Round

SP Windrowers

SP Windrowers Units by HP range



88 units ↑ 35% on 2021 ↑ 7% on 5yr avg
\$25 mill ↑ 86% on 2021 ↑ 39% on 5yr avg

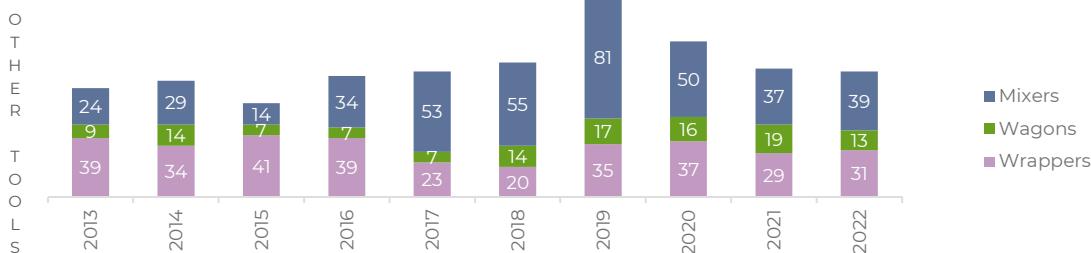
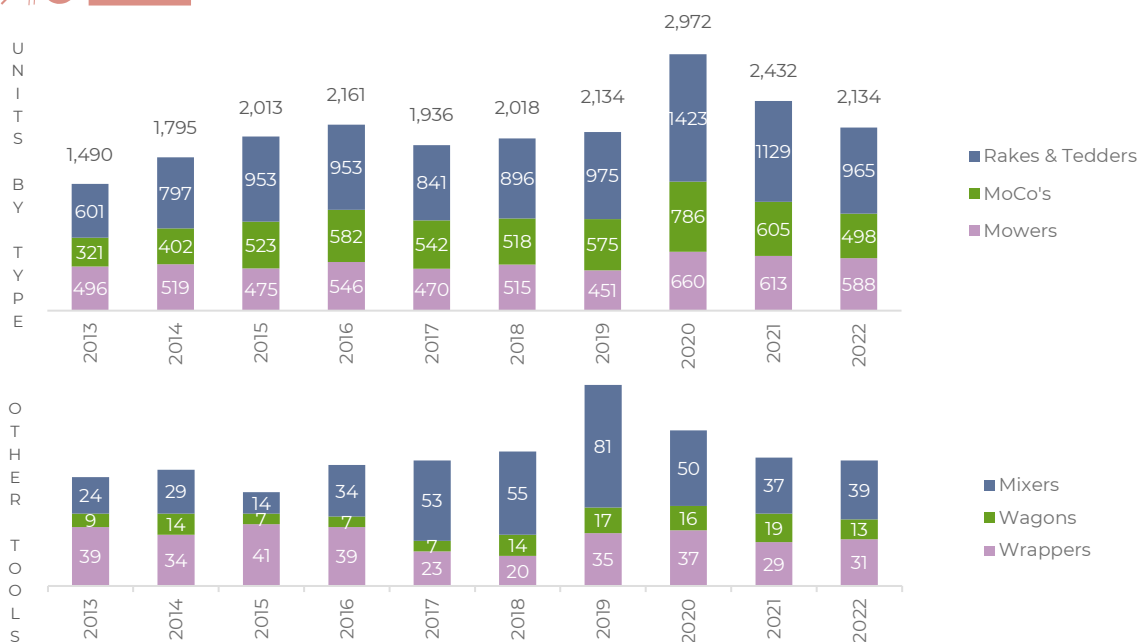


Hay Tools

Hay Tools Units by type



2,134 units ↓ 12% on 2021 ↓ 7% on 5yr avg
\$100.2 mill ↔ no shift on 2021 ↑ 14% on 5yr avg

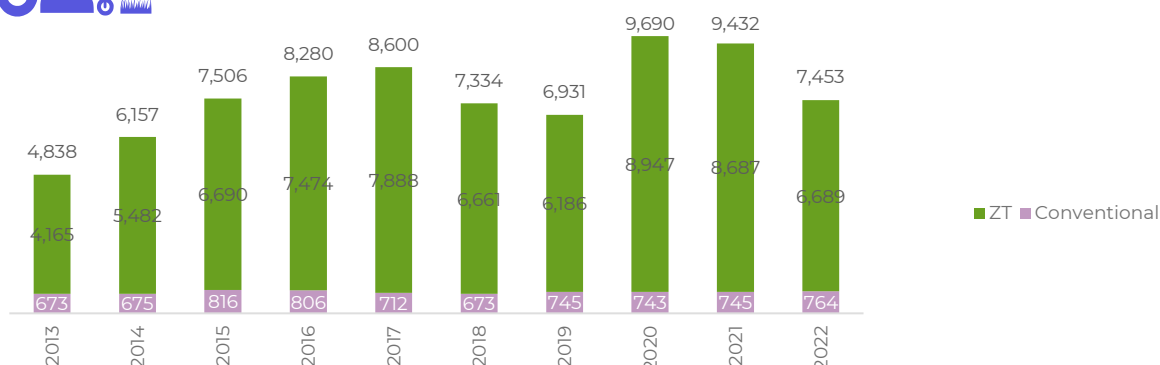


Commercial Out Front Mowers

OFM Units by type



7,453 units ↓ 21% on 2021 ↓ 11% on 5yr avg
\$97.2 mill ↓ 15% on 2021 ↓ 9% on 5yr avg



Tractors

Units around the State

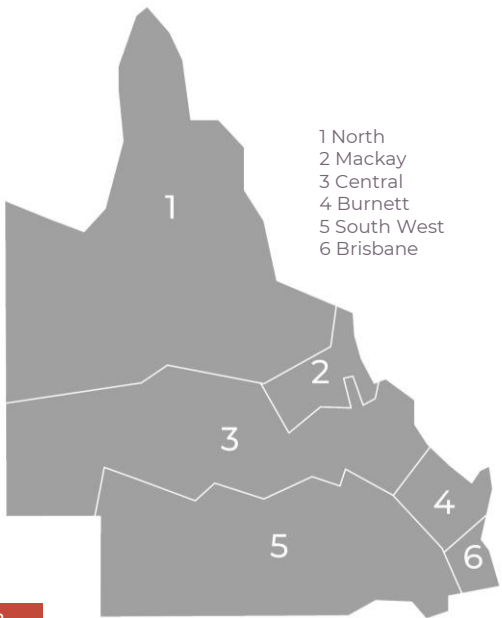


4,175 units ↑ 14% on 2021 ↑ 42% on 5yr avg
\$401 mill ↑ 9% on 2021 ↑ 42% on 5yr avg

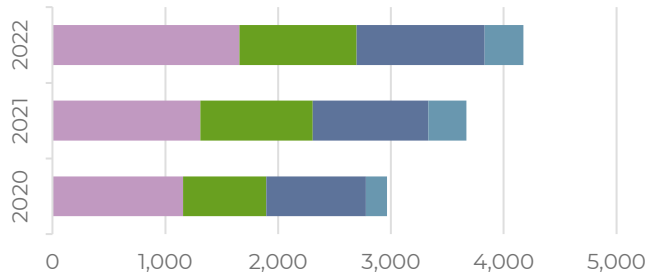
- 1 764 units ↓ 1% on 2021
\$77 mill ↓ 6% on 2021
- 3 297 units ↓ 1% on 2021
\$37 mill ↑ 11% on 2021
- 5 756 units ↑ 27% on 2021
\$134 mill ↑ 26% on 2021

- 2 321 units ↑ 23% on 2021
\$35 mill ↑ 14% on 2021
- 4 736 units ↑ 15% on 2021
\$53 mill ↓ 7% on 2021
- 6 1,301 units ↑ 19% on 2021
\$65 mill ↑ 8% on 2021

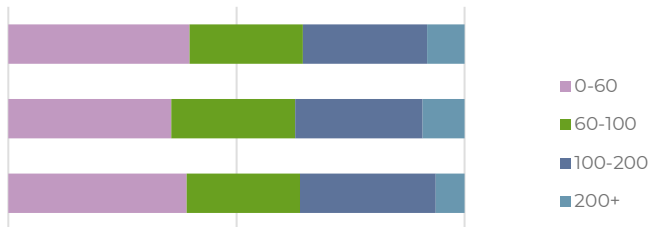
Please note localised year on year growth percentage tables are published in the appendix starting page 14



QLD Units by HP range

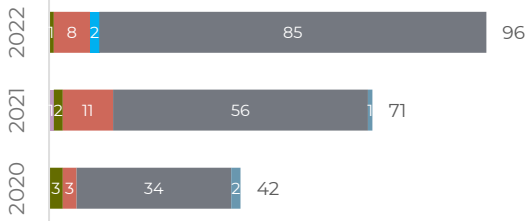


QLD HP range distribution



Combines

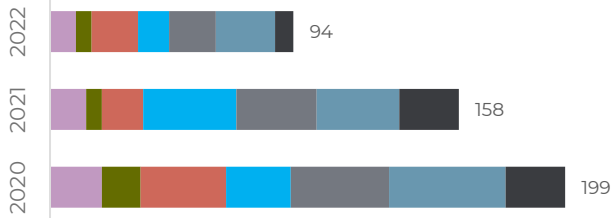
Combines – Units by Region



- 1 North
- 2 Mackay
- 3 Central
- 4 Burnett
- 5 South West
- 6 Brisbane

Balers

Baler – Units by Region



- 1 North
- 2 Mackay
- 3 Central
- 4 Burnett
- 5 South West
- 6 Brisbane
- Unidentified QLD

Baler – Type distribution



- Round
- Large Rect
- Small Rect

Tractors

Units around the State



5,409 units ↓ 1% on 2021 ↑ 28% on 5yr avg
\$655 mill ↓ 1% on 2021 ↑ 38% on 5yr avg

1 1,121 units ↑ 1% on 2021
\$67 mill ↑ 6% on 2021

2 950 units ↑ 23% on 2021
\$192 mill ↑ 14% on 2021

3 534 units ↓ 1% on 2021
\$32 mill ↓ 11% on 2021

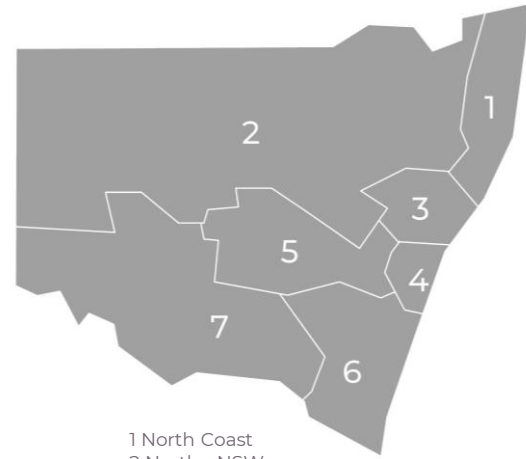
4 539 units ↔ no shift on 2021
\$25 mill ↑ 2% on 2021

5 533 units ↓ 9% on 2021
\$96 mill ↓ 9% on 2021

6 781 units ↑ 5% on 2021
\$61 mill ↓ 1% on 2021

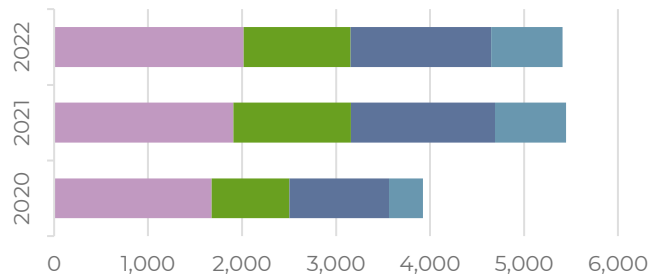
7 951 units ↓ 7% on 2021
\$183 mill ↓ 8% on 2021

Please note localised year on year growth percentage tables are published in the appendix starting page 14

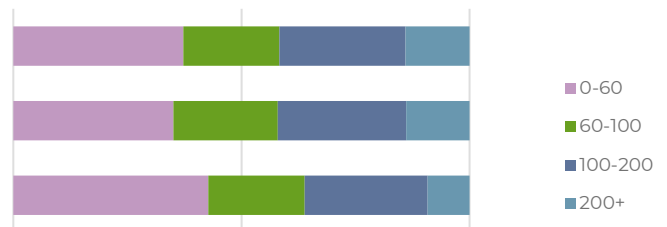


1 North Coast
2 North - NSW
3 Hunter
4 Sydney
5 Central West
6 Sth Coast-Tab
7 Riverina

NSW Units by HP range

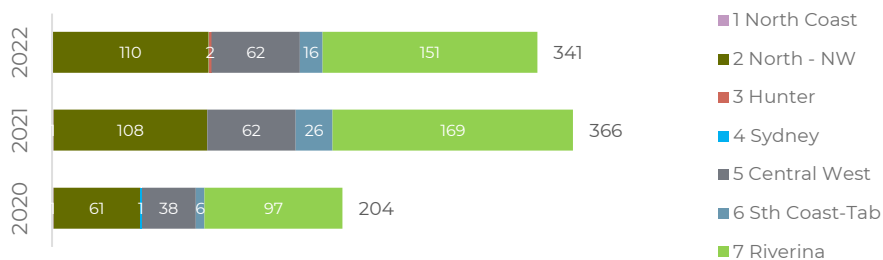


NSW HP range distribution



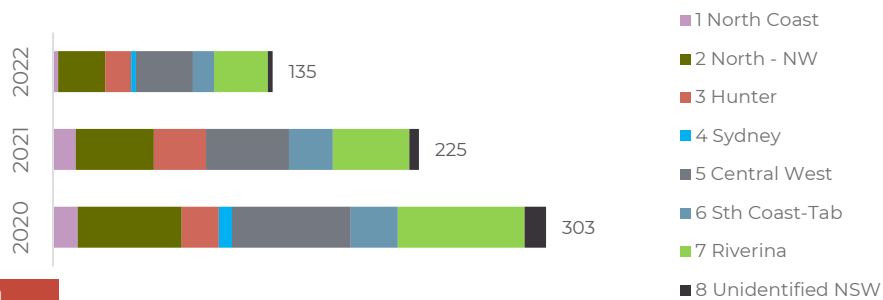
Combines

Combines – Units by Region



Balers

Baler – Units by Region



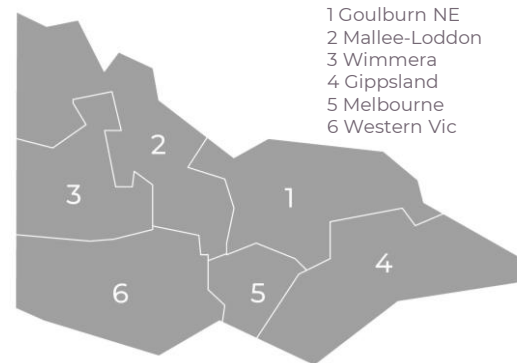
Baler – Type distribution



Tractors



4,307 units ↑ 2% on 2021 ↑ 18% on 5yr avg
\$466 mill ↓ 1% on 2021 ↑ 19% on 5yr avg

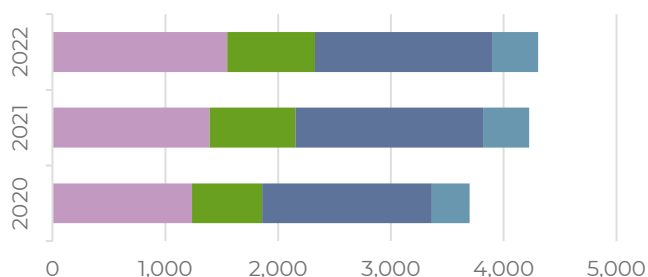


Units around the State

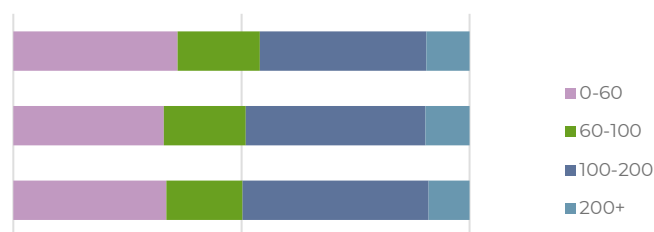
1	884 units ↑ 8% on 2021 \$99 mill ↑ 11% on 2021	2	690 units ↑ 4% on 2021 \$83 mill ↓ 4% on 2021
3	183 units ↓ 8% on 2021 \$46 mill ↓ 13% on 2021	4	737 units ↓ 3% on 2021 \$74 mill ↑ 1% on 2021
5	795 units ↑ 12% on 2021 \$49 mill ↑ 16% on 2021	6	1,018 units ↓ 6% on 2021 \$115 mill ↓ 8% on 2021

Please note localised year on year growth percentage tables are published in the appendix starting page 14

Vic Units by HP range

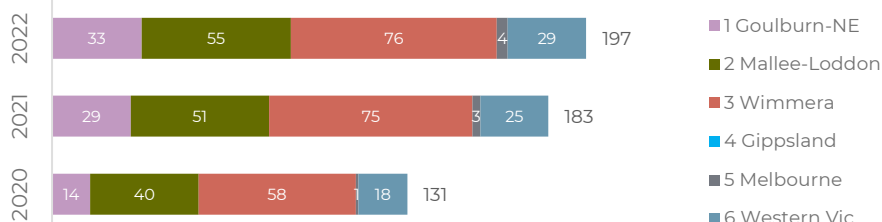


Vic HP range distribution



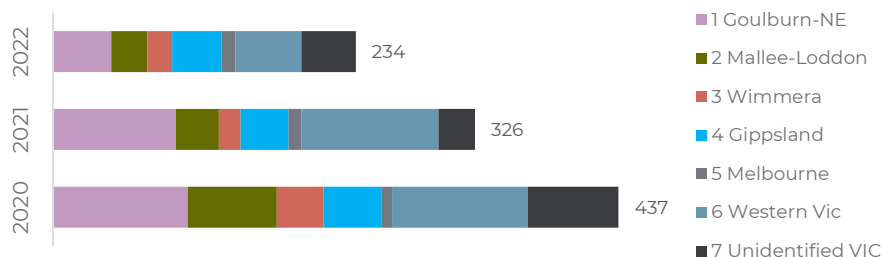
Combines

Combines – Units by Region



Balers

Baler – Units by Region



Baler – Type distribution



Tractors

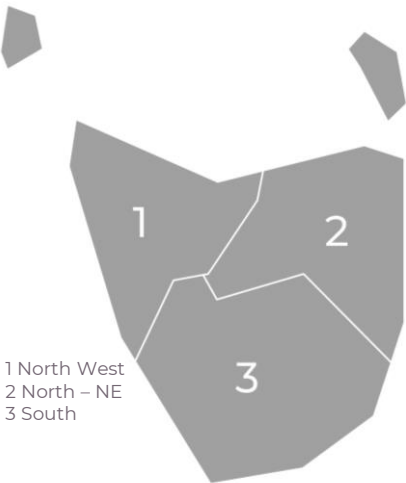
Units around the State



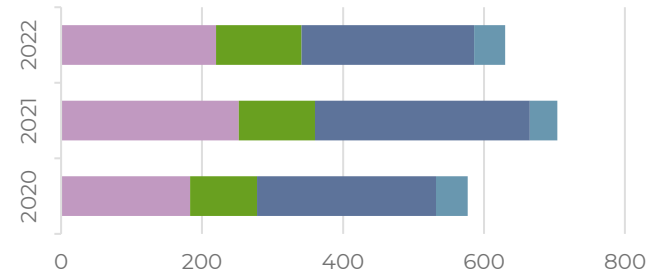
630 units ↓ 11% on 2021 ↑ 11% on 5yr avg
\$61 mill ↓ 9% on 2021 ↑ 10% on 5yr avg

- 1 230 units ↑ 6% on 2021
\$25 mill ↑ 1% on 2021
- 2 224 units ↓ 15% on 2021
\$24 mill ↓ 13% on 2021
- 3 176 units ↓ 21% on 2021
\$12 mill ↓ 22% on 2021

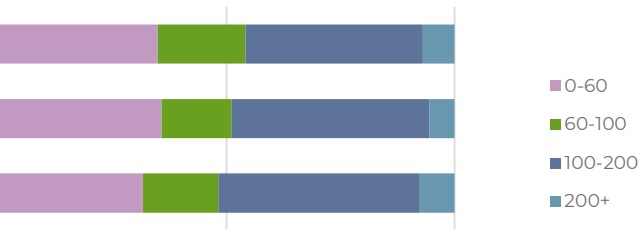
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Tas Units by HP range

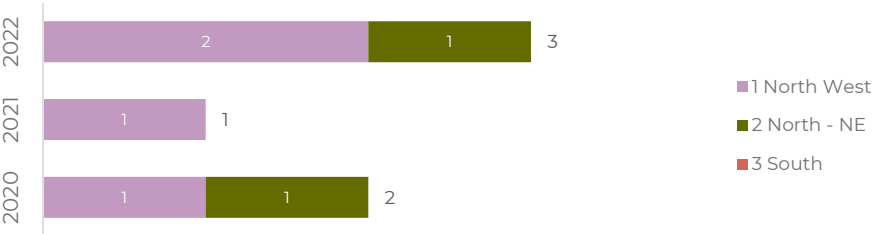


Tas HP range distribution



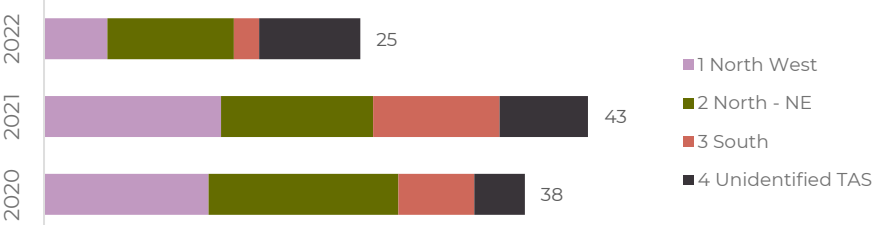
Combines

Combines – Units by Region



Balers

Combines – Units by Region



Baler – Type distribution



Tractors

Units around the State



1,329 units ↓ 3% on 2021 ↑ 11% on 5yr avg
\$213 mill ↑ 2% on 2021 ↑ 19% on 5yr avg

1 230 units ↓ 16% on 2021
\$27 mill ↓ 9% on 2021

2 296 units ↓ 6% on 2021
\$59 mill ↑ 5% on 2021

3 513 units ↑ 7% on 2021
\$43 mill ↑ 23% on 2021

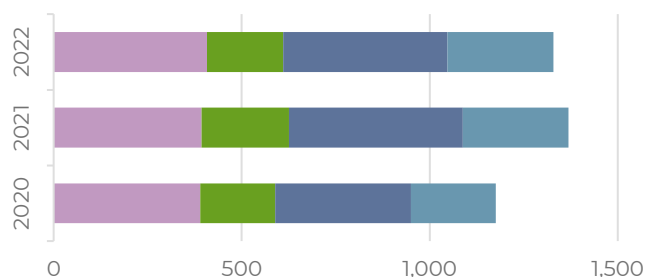
4 199 units ↑ 1% on 2021
\$55 mill ↓ 2% on 2021

5 91 units ↓ 10% on 2021
\$30 mill ↓ 11% on 2021

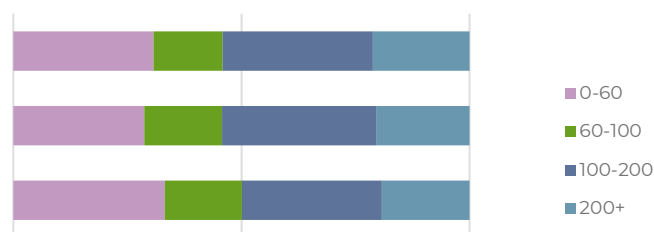
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SA Units by HP range

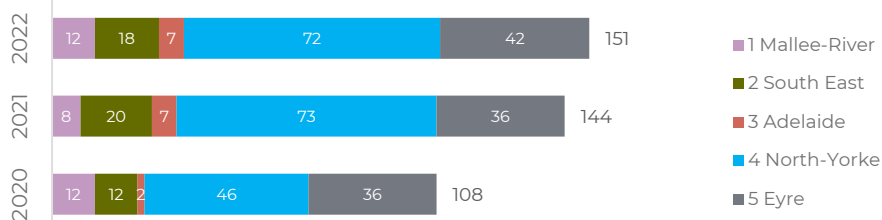


SA HP range distribution



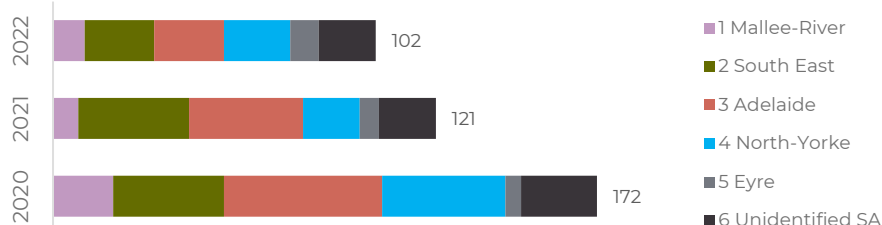
Combines

Combines – Units by Region



Balers

Combines – Units by Region



Baler – Type distribution



Tractors

Units around the State



1,698 units ↑ 4% on 2021 ↑ 36% on 5yr avg
\$343 mill ↑ 13% on 2021 ↑ 49% on 5yr avg

1 181 units ↓ 1% on 2021
\$48 mill ↓ 1% on 2021

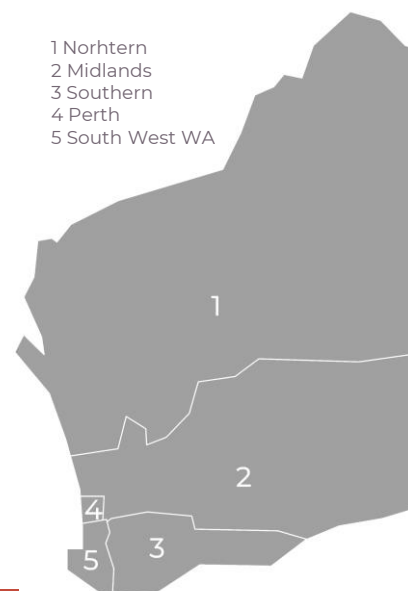
2 307 units ↑ 8% on 2021
\$96 mill ↑ 6% on 2021

3 455 units ↑ 15% on 2021
\$148 mill ↑ 30% on 2021

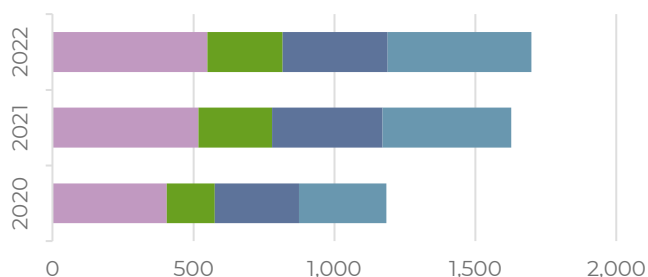
4 333 units ↑ 2% on 2021
\$20 mill ↑ 14% on 2021

5 422 units ↓ 4% on 2021
\$32 mill ↓ 7% on 2021

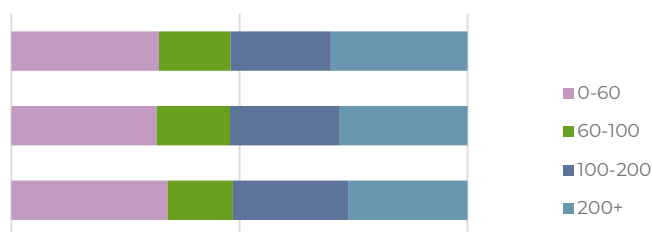
Please note localised year on year growth percentage tables are published in the appendix starting page 14



WA Units by HP range

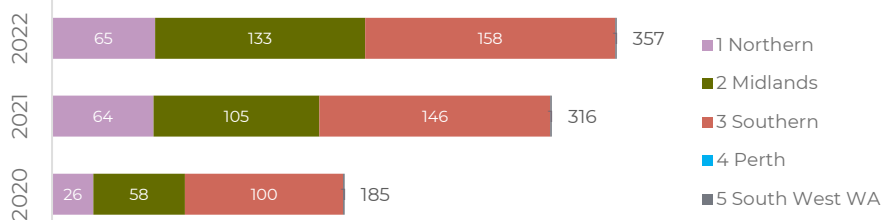


WA HP range distribution



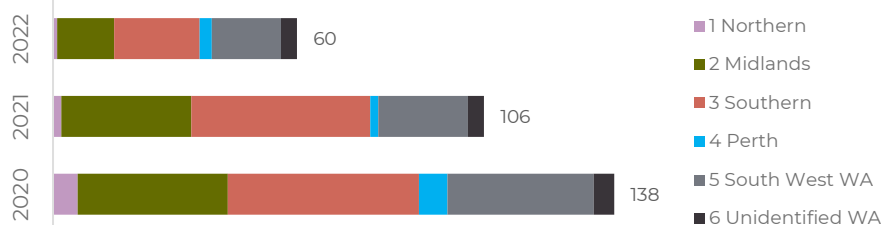
Combines

Combines – Units by Region



Balers

Combines – Units by Region



Baler – Type distribution



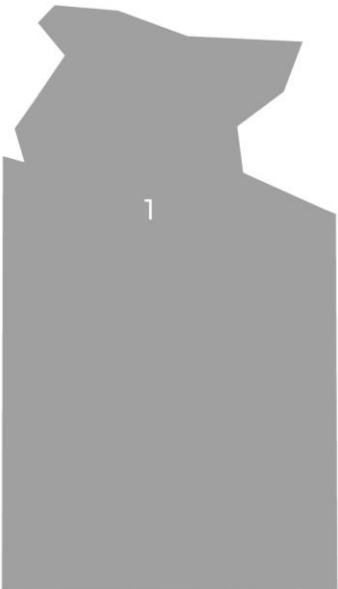
Tractors

Units around the State

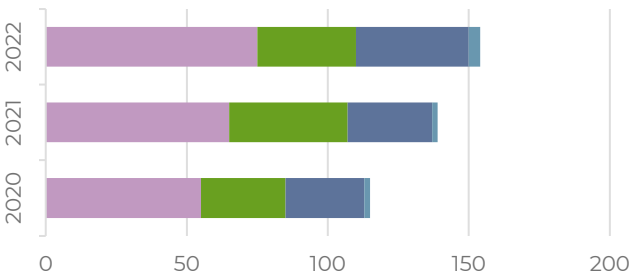


154 units ↑ 11% on 2021 ↑ 30% on 5yr avg
\$10 mill ↑ 19% on 2021 ↑ 47% on 5yr avg

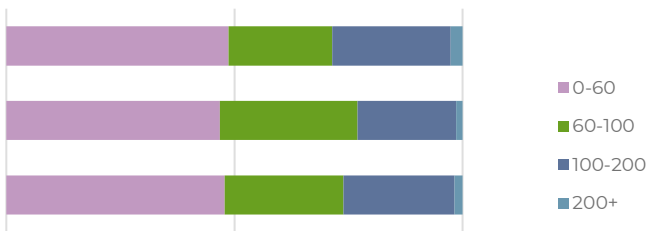
Please note localised year on year growth percentage tables are published in the appendix starting page 14



NT Units by HP range



NT HP range distribution



Combines

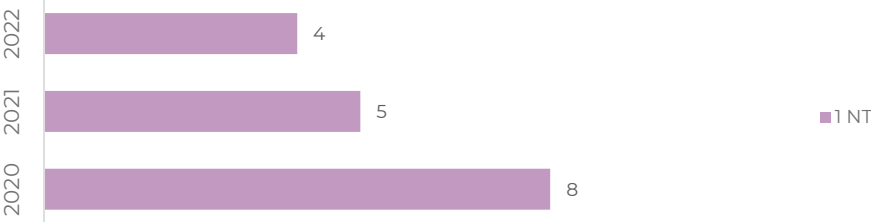
Combines – Units by Region



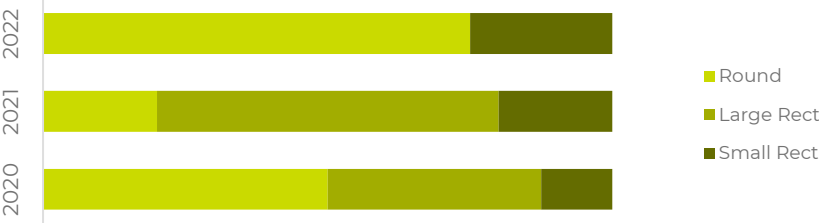
Not applicable to this state

Balers

Combines – Units by Region



Baler – Type distribution



Year on year unit growth rate

QLD

Zone	Dealer	2022pct
1. North	Atherton	16%
	Ayr	-12%
	Bowen	10%
	Cairns	-2%
	Ingham	-19%
	Innisfail	-26%
	Townsville	15%
2. Mackay	Tully	2%
	Clermont	-30%
	Mackay	26%
3. Central	Proserpine	48%
	Biloela	33%
	Emerald	13%
4. Burnett	Rockhampton	-10%
	Bundaberg	12%
	Gayndah	9%
	Gympie	21%
5. South West	Kingaroy	26%
	Chinchilla	-15%
	Dalby	36%
	Goondiwindi	58%
	Roma	-8%
	St George	38%
	Stanthorpe	63%
6. Brisbane	Toowoomba	48%
	Warwick	-15%
	Boonah	32%
	Brisbane	1%
	Caboolture	8%
	Gatton	41%
	Ipswich	21%
	Nambour	23%

NSW

Zone	Dealer	2022pct
1. North Coast	Coffs Harbour	-6%
	Grafton	-5%
	Lismore	7%
	Murwillumbah	10%
	Taree	-13%
2. North - NW	Wauchope	22%
	Armidale	31%
	Dubbo	3%
	Gunnedah	0%
	Inverell	13%
	Moree	17%
	Mudgee	11%
3. Hunter	Narrabri	37%
	Nyngan	48%
	Quirindi	4%
	Tamworth	8%
	Walgett	8%
4. Sydney	Gloucester	6%
	Maitland	-16%
	Muswellbrook	-7%
	Newcastle	-6%
5. Central West	Singleton	-23%
	Camden	-1%
	Gosford	-19%
	Sydney	7%
	Cowra	-9%
6. Sth Coast-Tab	Forbes	-21%
	Grenfell	23%
	Orange	0%
	Parkes	-23%
	West Wyalong	-11%
	Bega	-9%
	Goulburn	17%
7. Riverina	Moss Vale	-9%
	Queanbeyan	16%
	Wollongong	21%
	Young	4%
	Albury	-7%
	Balranald	10%
	Deniliquin	-6%
	Finley	6%
	Griffith	3%
	Narrandera	-14%
	Wagga Wagga	-18%
	Wentworth	-2%

Year on year unit growth rate

VIC

Zone	Dealer	2022pct
1. Goulburn-NE	Cobram	5%
	Echuca	-3%
	Euroa	9%
	Kyabram	21%
	Shepparton	23%
	Wangaratta	3%
	Wodonga	-6%
	Yea	24%
2. Mallee-Loddon	Bendigo	-5%
	Boort	10%
	Kerang	-13%
	Kyneton	-1%
	Mildura	0%
	Ouyen	42%
	Swan Hill	43%
	Wycheproof	-23%
3. Wimmera	Hopetoun	19%
	Horsham	-15%
	Nhill	10%
	St Arnaud	9%
	Warracknabeal	-19%
4. Gippsland	Bairnsdale	-17%
	Foster	-24%
	Korumburra	14%
	Morwell	-15%
	Sale	-2%
	Warragul	11%
5. Melbourne	Melbourne	9%
	Pakenham	15%
	Werribee	0%
	Whittlesea	-6%
	Yarra Glen	18%
6. Western Vic	Ballarat	-6%
	Colac	-3%
	Geelong	-5%
	Hamilton	-20%
	Mortlake	0%

TAS

Zone	Dealer	2022pct
1. North West	Burnie	6%
2. North - NE	Launceston	-15%
3. South	Hobart	-21%

SA

Zone	Dealer	2022pct
1. Mallee-River	Berri	-16%
	Mannum	-6%
	Murray Bridge	-31%
2. South East	Pinnaroo	0%
	Bordertown	24%
	Meningie	21%
	Mount Gambier	-8%
	Naracoorte	-20%
3. Adelaide	Adelaide	6%
	Gawler	88%
	Kingscote	-13%
	Lobethal	-19%
	Strathalbyn	3%
4. North-Yorke	Tanunda	33%
	Clare	13%
	Crystal Brook	17%
	Kadina	14%
	Saddleworth	-30%
5. Eyre	Upper North	7%
	Tumby Bay	-11%
	Wudinna	-7%

Year on year unit growth rate

NT

Zone	Dealer	2022pct
1. N.T.	Darwin	11%

WA

Zone	Dealer	2022pct
1. Northern	Carnarvon	-37%
	Geraldton	12%
	Kununurra	19%
	Morawa	-15%
	Port Hedland	-25%
2. Midlands	Bindoon	-53%
	Kellerberrin	-14%
	Merredin	36%
	Moora	17%
	Mukinbudin	6%
	Narembeen	-17%
	Northam	13%
	Quairading	27%
	Wongan Hills	44%
3. Southern	Albany	14%
	Brookton	-7%
	Corrigin	-30%
	Esperance	22%
	Katanning	13%
	Kulin	-11%
	Narrogin	42%
	Wagin	26%
4. Perth	Perth	2%
5. South West WA	Boyup Brook	-21%
	Bunbury	0%
	Manjimup	-31%
	Waroona	17%
	Witchcliffe	14%

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