September 2026

Dealer Network Health Assessment

Australia

kynetec

TMA TRACTOR AND MACHINERY ASSOCIATION OF AUSTRALIA

EMPOWERING YOUR FUTURE

Australian Dealer Network Health Assessment – September 2026

SURVEY SNAPSHOT • SENTIMENT • SALES • STOCK • STAFFING

132 dealer responses across Australia

Survey scope. The assessment combines 63 email responses and 69 phone interviews, creating a broad national view of dealer sentiment, demand, inventory and workforce intentions.

Momentum is improving. 31% expect turnover growth, used-equipment sales are the standout at 46%, and after-sales service and parts expectations remain strongly positive.

Pressure points remain. New-tractor demand softened and used inventory tightened across key categories. South Australia leads many outlook measures; New South Wales and Queensland/NT lag in selected markets.

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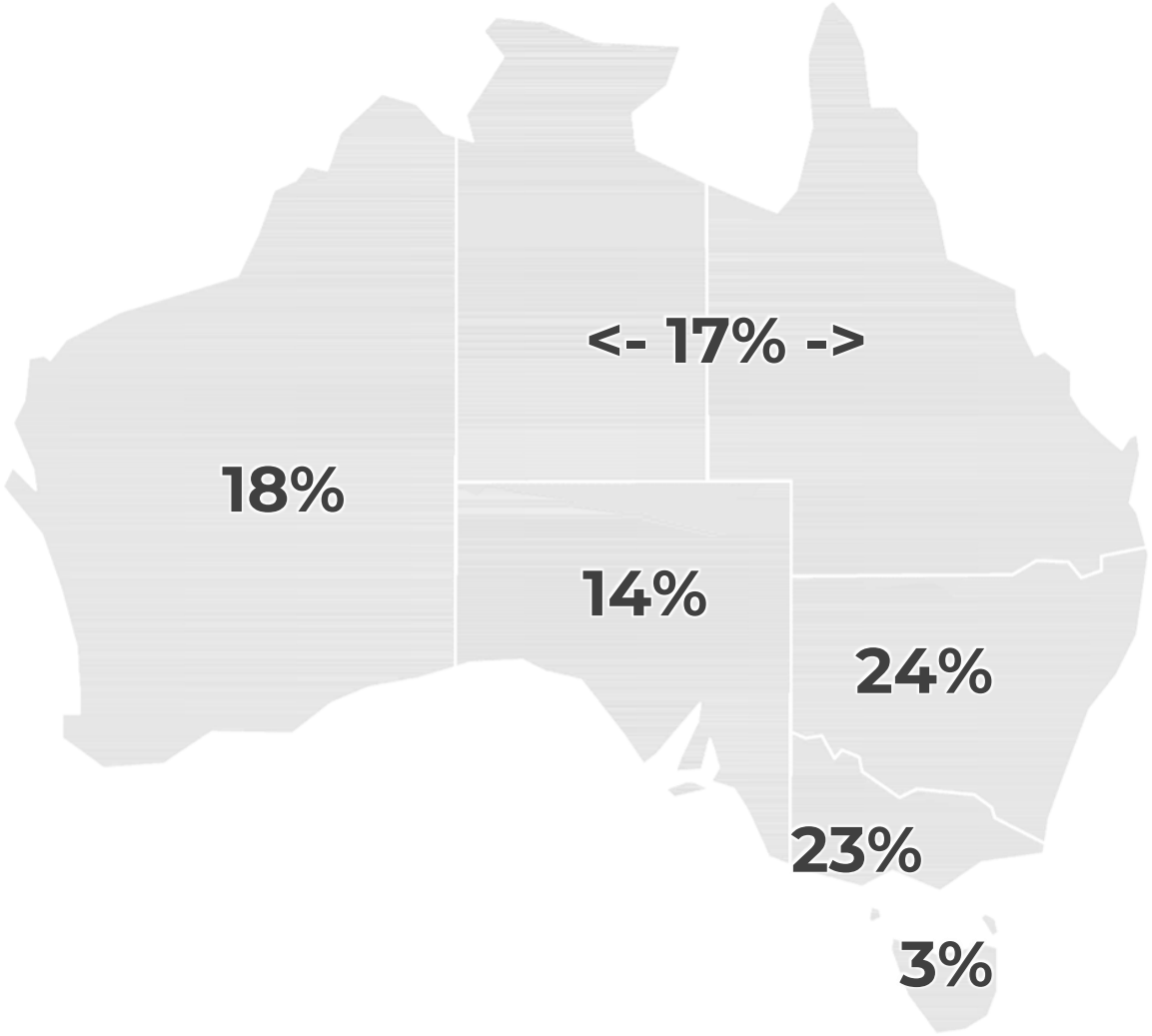
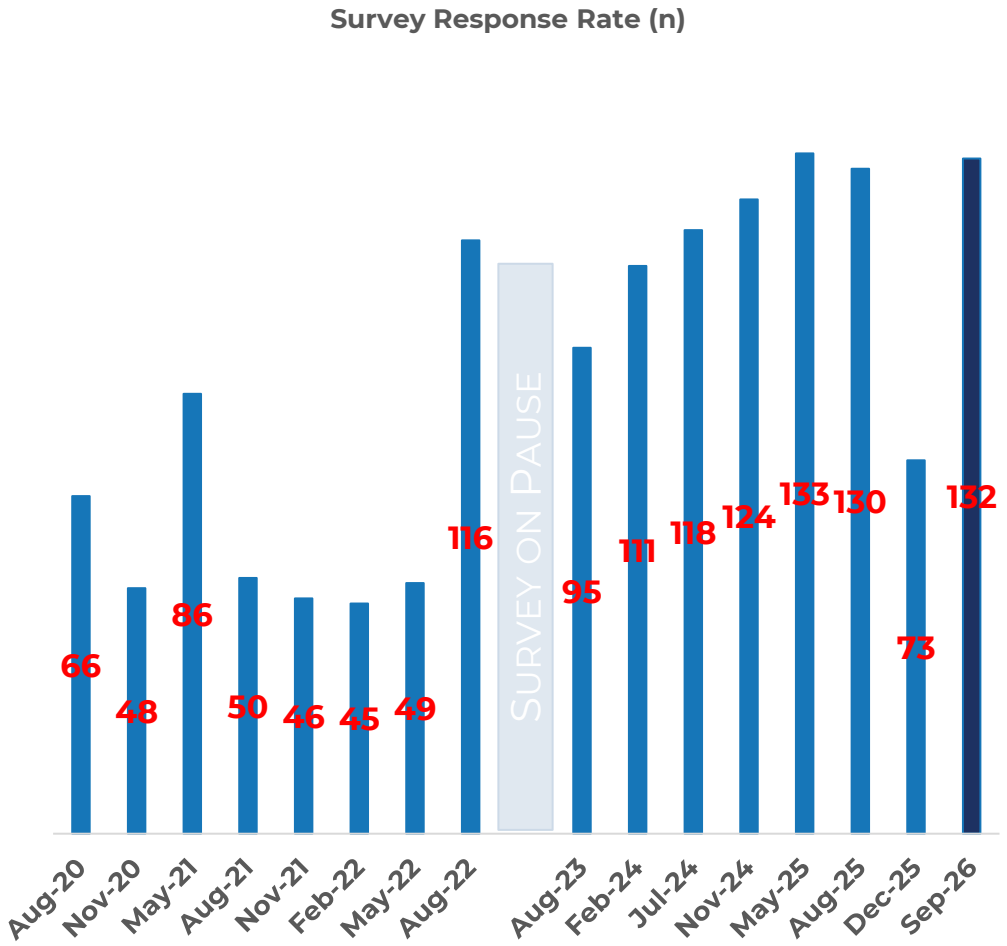
Dealer Response Sample (by State)

A robust and representative sample was captured through a combination of dealer email responses (n=63) and direct phone interviews (n=69), providing a strong foundation for the analysis





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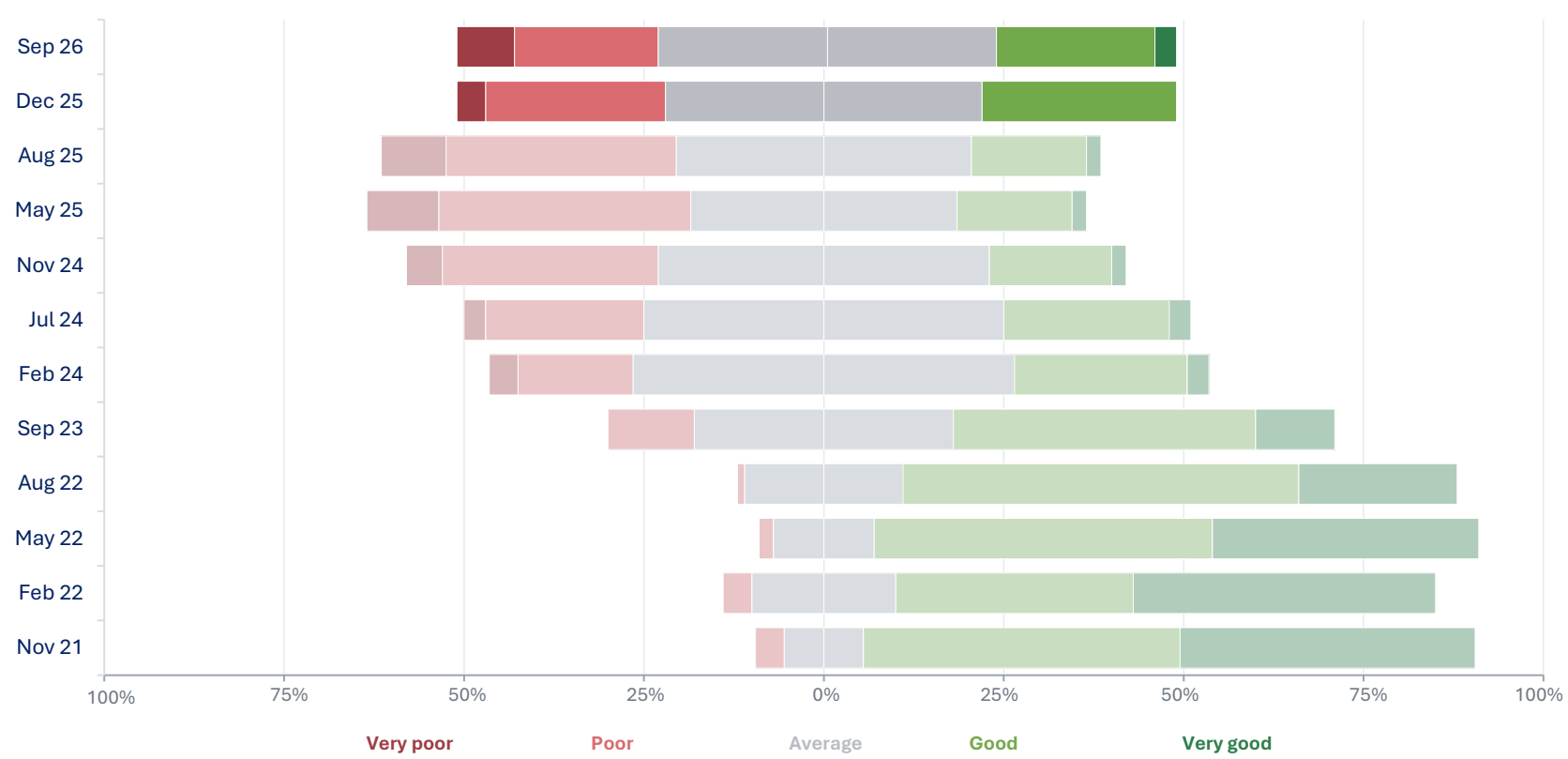
Current overall turnover is...

September 2026 sentiment remained broadly steady versus December, but the extremes both increased: very poor doubled from 4% to 8%, while very good rose from 0% to 3%. Overall, 29% were negative, 44% average and 27% positive. Among states, South Australia led at 3.32; New South Wales trailed at 2.25.

Sentiment over time



State mean (1–5)

Dec 25 and Sep 26 highlighted

Sep 26 29% negative • 44% average • 27% positive
Dec 25 29% negative • 44% average • 27% positive

Q1: We consider our current overall turnover to be; n=132

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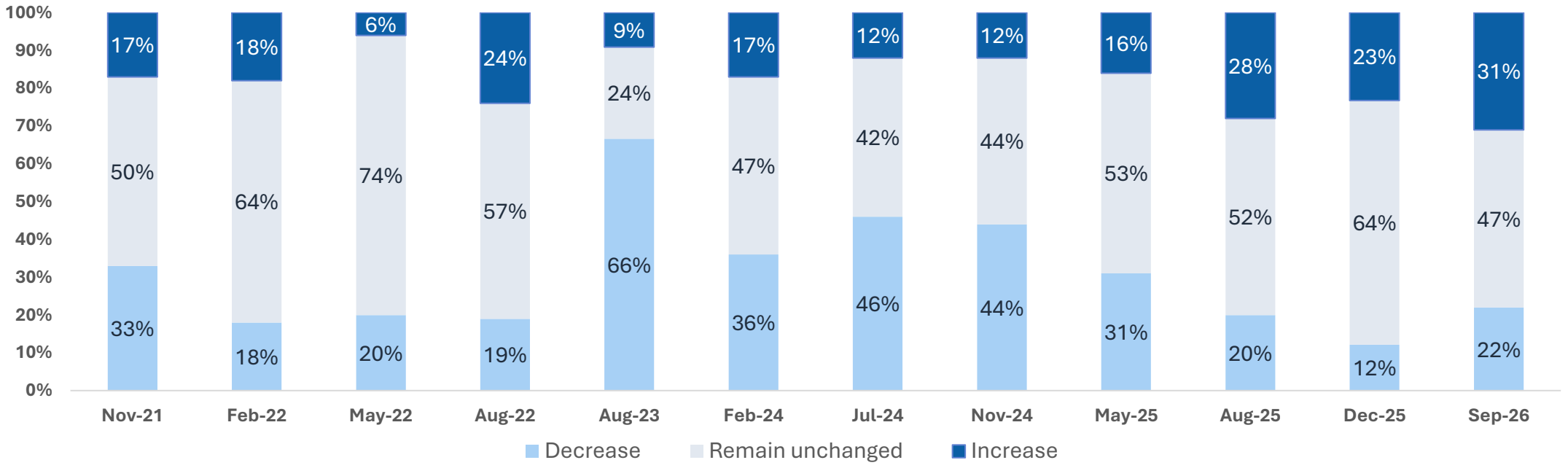
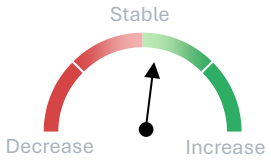
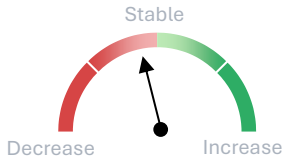
Overall turnover in the next 6 months will...

September 2026 sentiment remains cautiously positive, with 31% expecting turnover growth, the highest increase outlook ever, while 47% expect stability and 22% anticipate decline. State barometers indicate broadly stable conditions, with South Australia showing the strongest positive momentum and other regions remaining balanced.

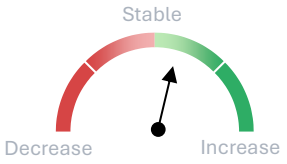




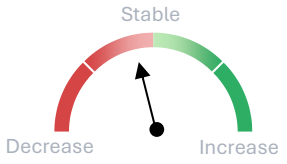
National



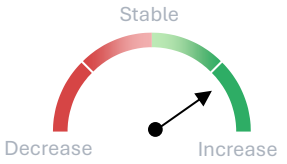
New South Wales



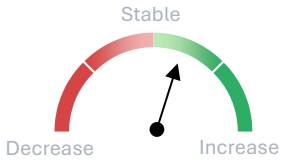
Victoria



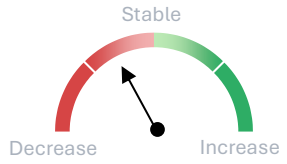
Queensland / NT



South Australia



Western Australia



Tasmania

Q2: We expect overall turnover in the next 6 months to...; n=132

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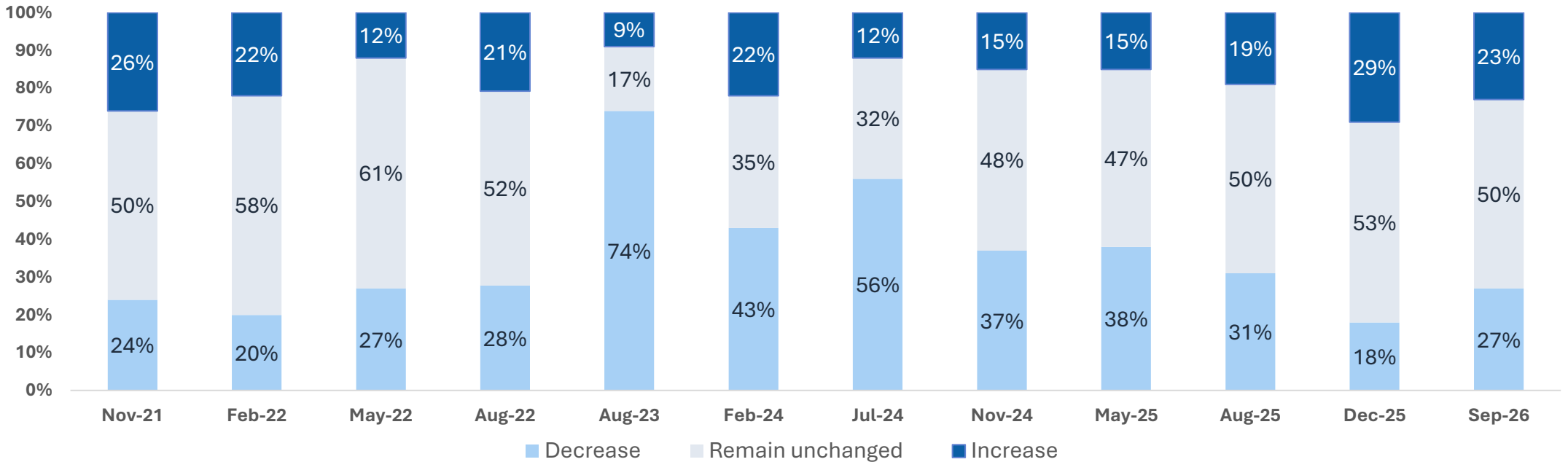
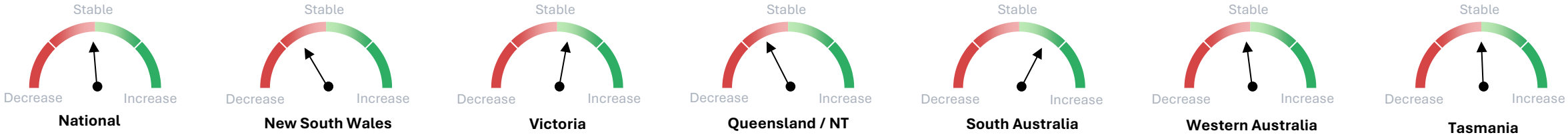
New Tractor sales in the next 6 months will...

September 2026 outlook softened: 23% expect tractor sales to increase, down six points; 50% expect stability, down three; and 27% expect decline, up nine. South Australia leads, Victoria is positive, Queensland/NT and New South Wales lag, while others remain stable.





Q3: We expect new tractor sales in the next 6 months to...; n=132

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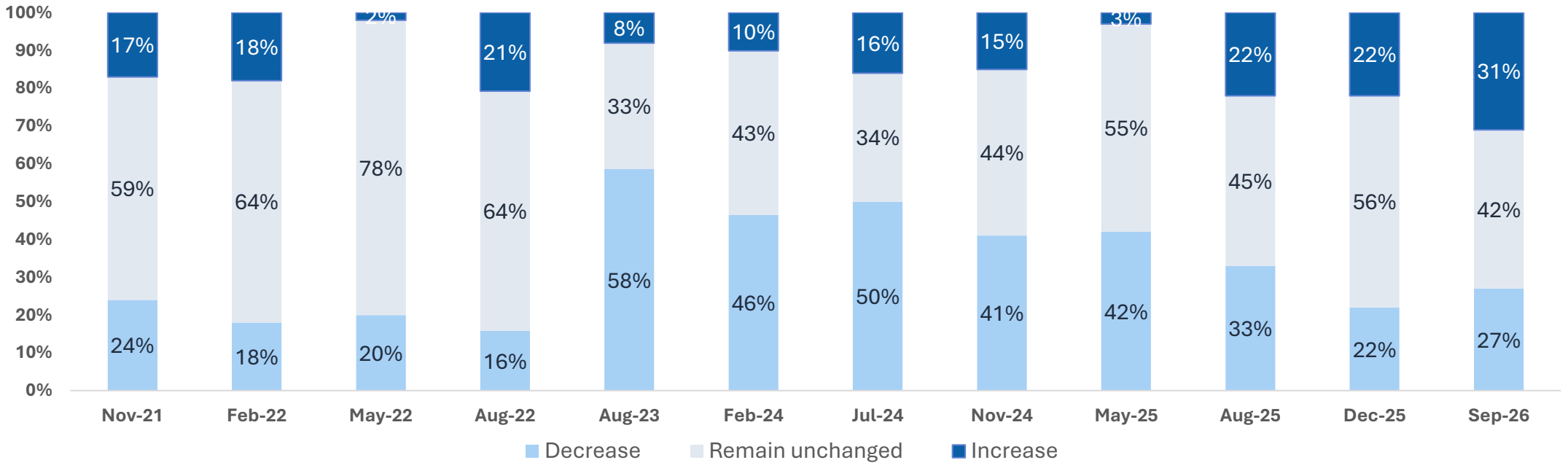
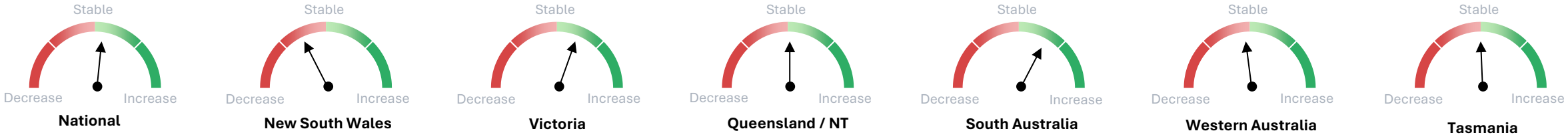
New combine harvester sales in the next 6 months will...

September 2026 combine harvester outlook strengthened: growth rose nine to 31%, stability fell fourteen to 42%, and decline increased five to 27%. South Australia leads, Victoria is positive, New South Wales trails, while Queensland/NT, Western Australia and Tasmania remain stable.





Q4: We expect new combine harvester sales in the next 6 months to...; n=67 (n=65 removed – not applicable)

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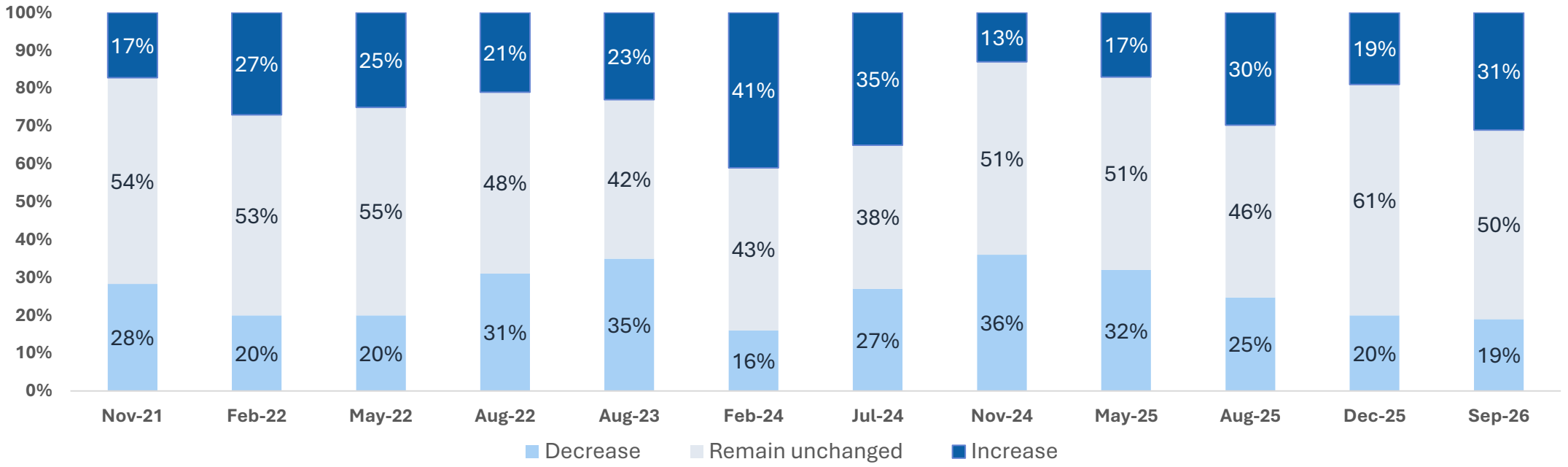
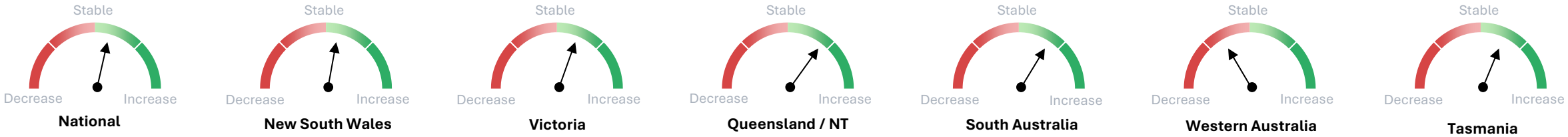
New baler and hay tools sales in the next 6 months will...

September 2026 equipment outlook strengthened: growth rose twelve to 31%, stability fell eleven to 50%, and decline eased one to 19%. Nationally positive, Queensland/NT leads; Tasmania, Victoria and South Australia are positive, New South Wales stable, while Western Australia weakens.





Q5: We expect new baler and hay tools sales in the next 6 months to...; n=118 (n=14 removed – not applicable)

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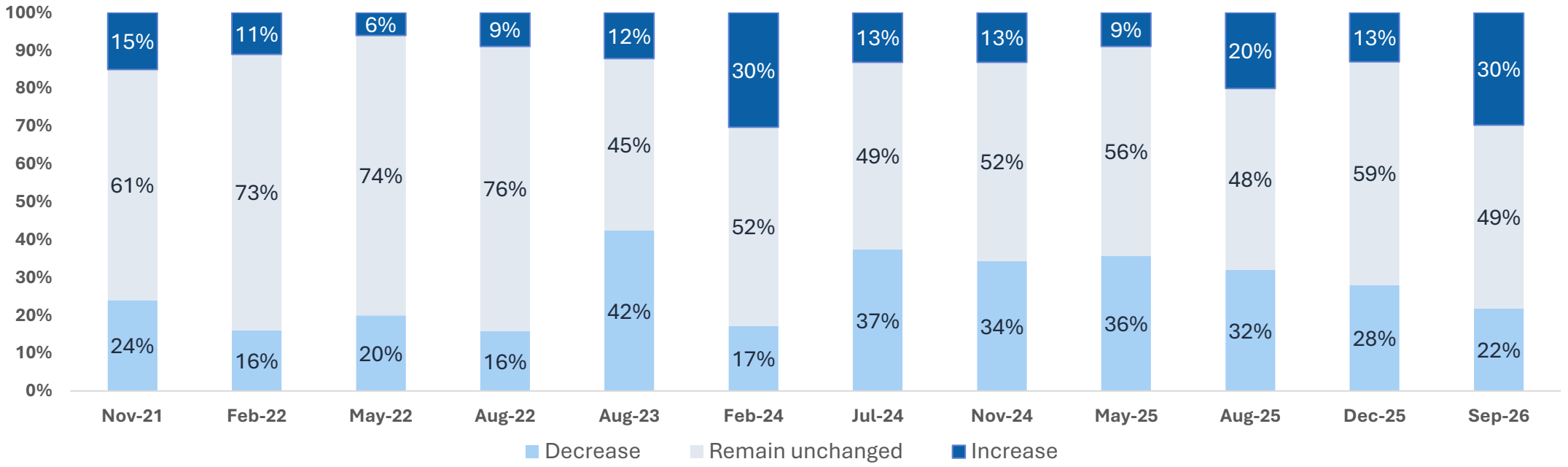
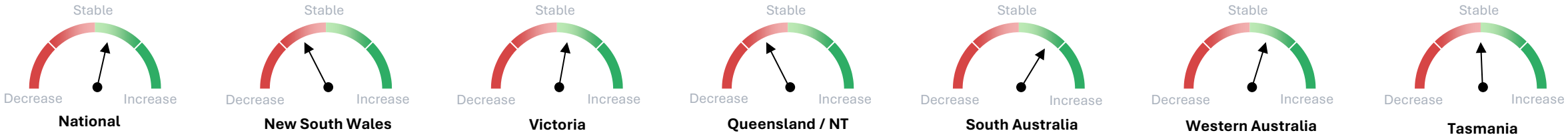
New SP sprayer sales in the next 6 months will...

September 2026 SP sprayer outlook improved: growth jumped seventeen to 30%, stability fell ten to 49%, and decline eased six to 22%. Nationally outlook is positive, Western Australia leads, South Australia is positive, Victoria and Tasmania stable, while NSW and Queensland/NT lag.





Q6: We expect new SP sprayer sales in the next 6 months to...; n=88 (n=44 removed – not applicable)

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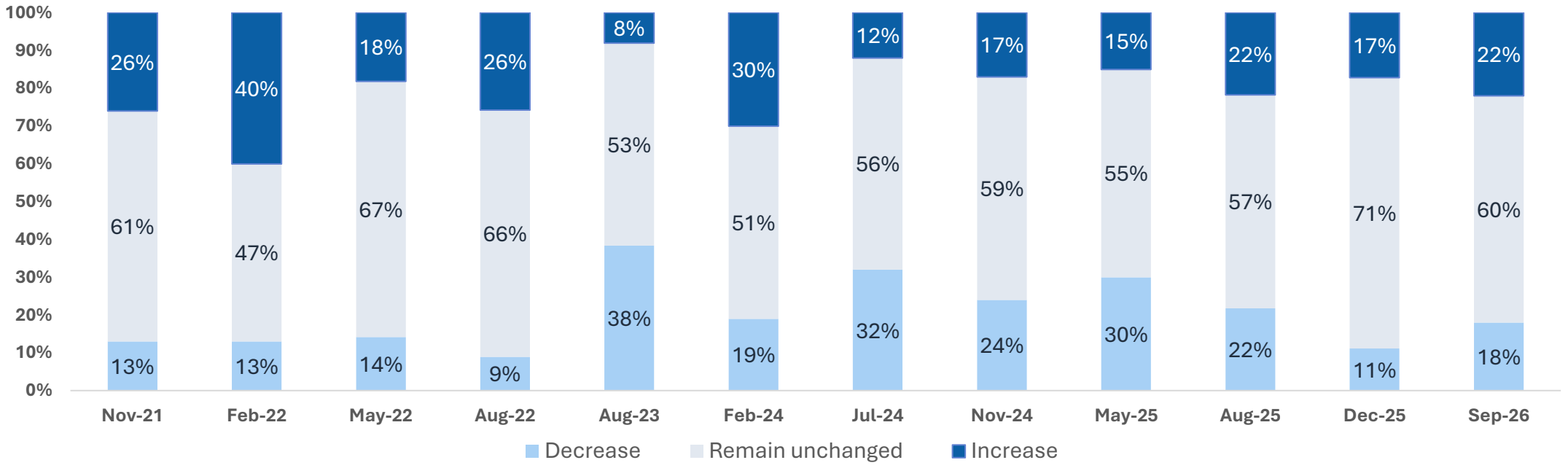
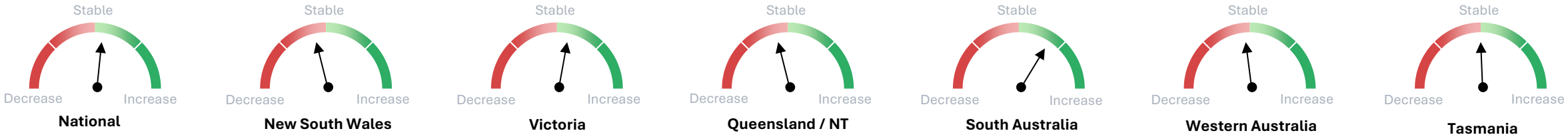
New implement sales in the next 6 months will...

September 2026 implement outlook became more mixed: growth rose five to 22%, stability fell eleven to 60%, while decline increased seven to 18%. South Australia leads; Victoria is slightly positive, NSW and Queensland/NT lean negative, with WA and Tasmania stable.





Q7: We expect new implement sales in the next 6 months to...; n=126 (n=6 removed – not applicable)

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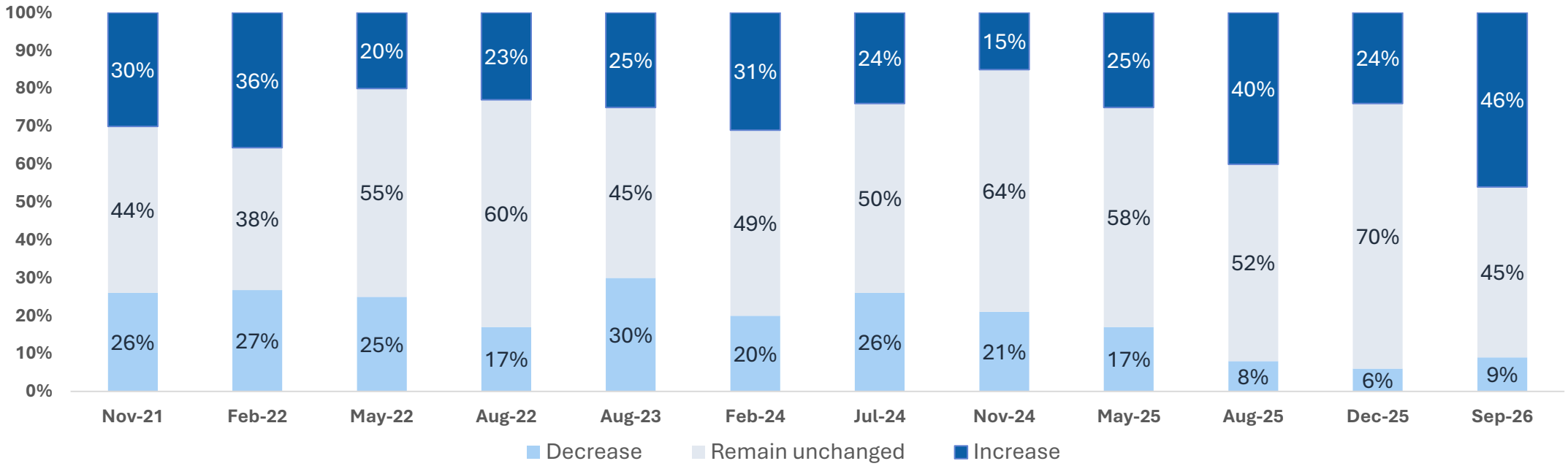
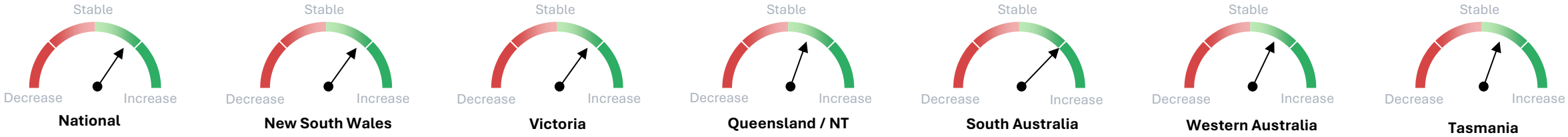
Used equipment sales in the next 6 months will...

September 2026 used equipment outlook surged: growth rose twenty-two to 46%, stability fell twenty-five to 45%, and decline edged three to 9%. Every state is positive; South Australia leads, followed by New South Wales, Victoria, Western Australia, Tasmania and Queensland/NT.





Q8: We expect used equipment sales in the next 6 months to...; n=131 (n=1 removed – not applicable)

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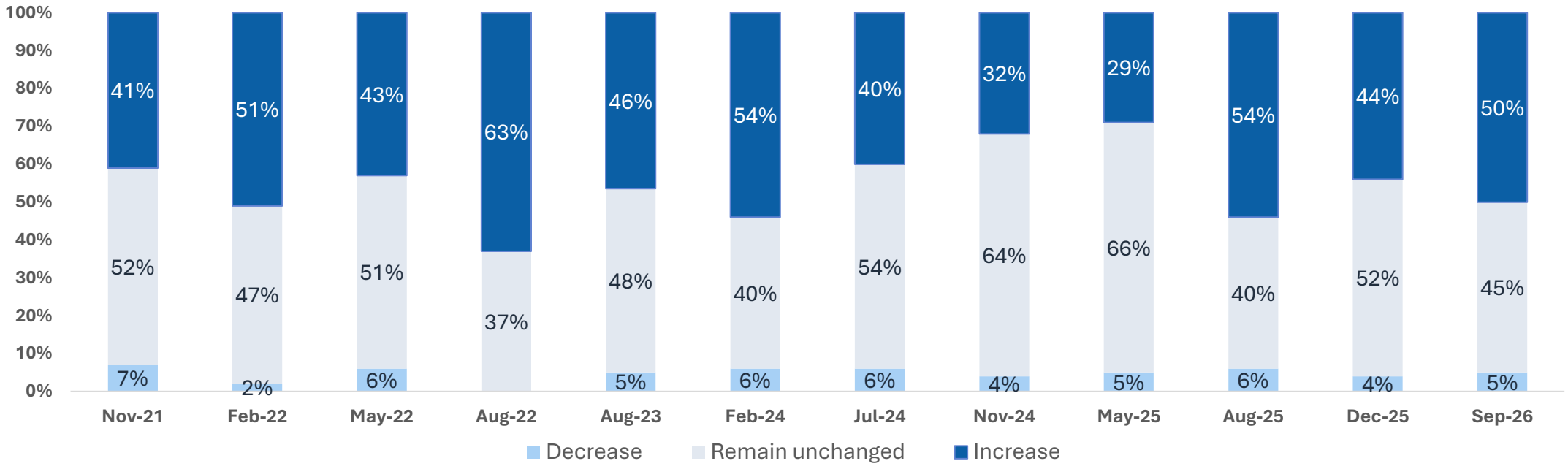
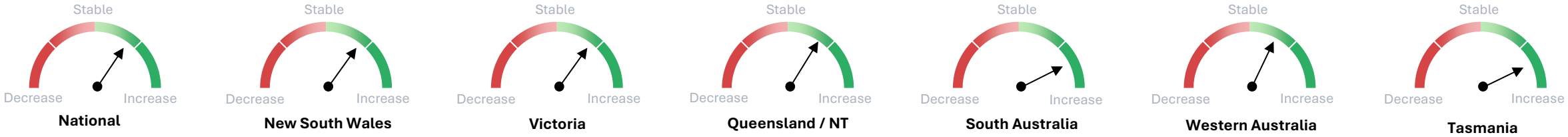
After sales ‘service’ support in the next 6 months will…

September 2026 after-sales service expectations strengthened this wave: 50% anticipate an increase, up from 44% in December 2025, while stability fell to 45% and decline edged to 5%. Barometers show South Australia and Tasmania strongest, with every state stable-to-positive overall.





Q9: We expect after sales support in the next 6 months to…; n=131 (n=1 removed – not applicable)

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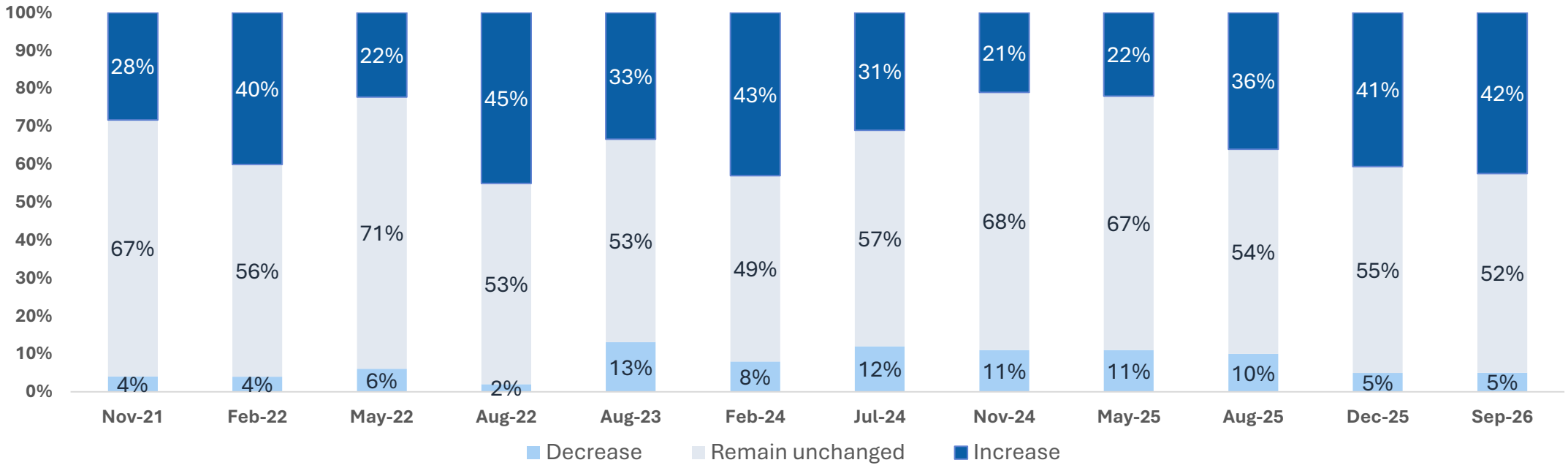
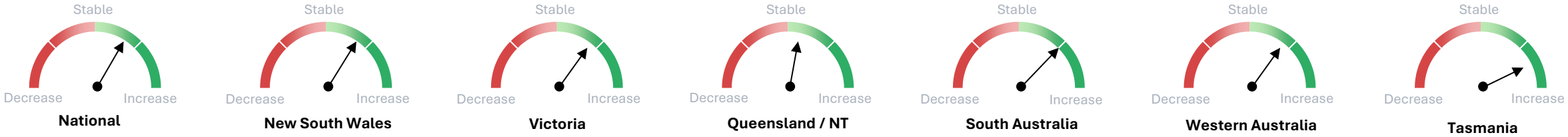
After sales ‘technology’ support in the next 6 months will…

September 2026 after-sales technology expectations improved slightly: 42% anticipate an increase, up from 41% in December 2025, while stability eased three points to 52% and decline held at 5%. Barometers show South Australia and Tasmania leading positive sentiment with all other states expecting an increase.





Q10: We expect after sales technology support in the next 6 months to…; n=128 (n=4 removed – not applicable)

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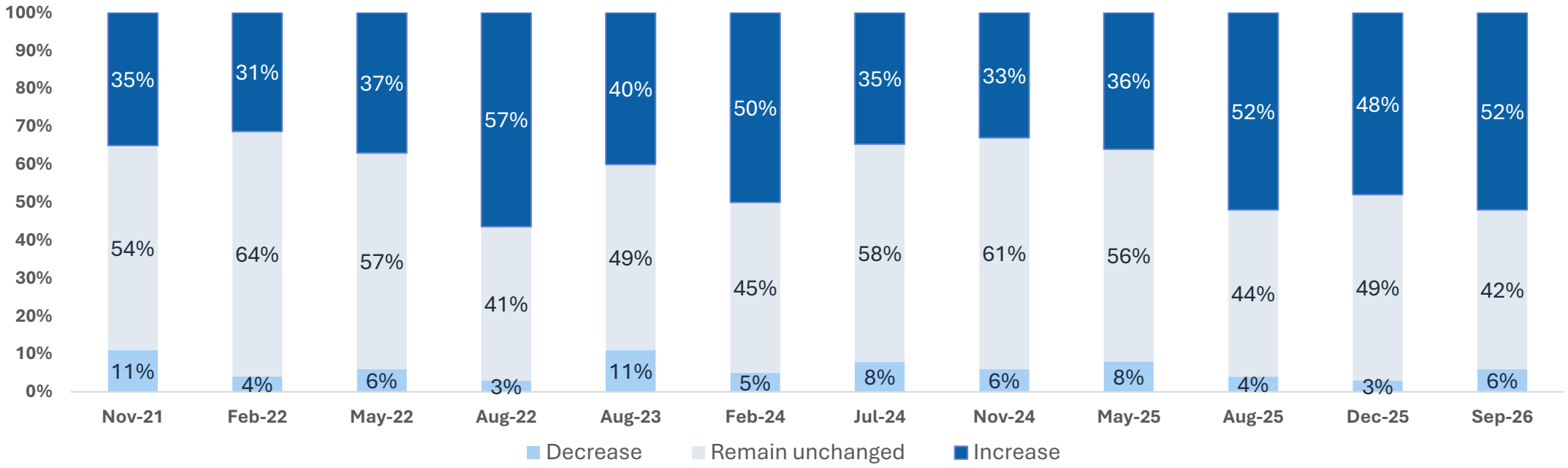
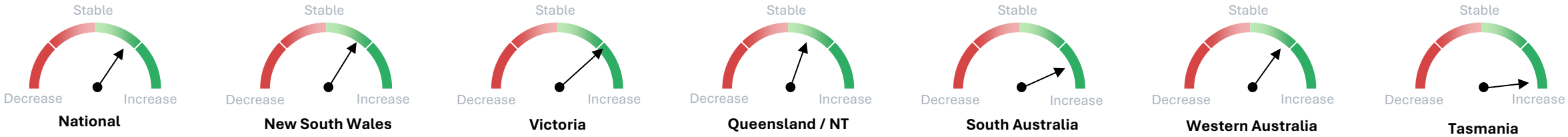
After sales ‘parts’ support in the next 6 months will...

September 2026 after-sales parts expectations strengthened: 52% anticipate an increase, up from 48% in December 2025, while stability fell from 49% to 42% and decline rose to 6%. Barometers show South Australia and Tasmania leading, with other states broadly positive.





Q11: We expect after sales parts support in the next 6 months to...; n=132

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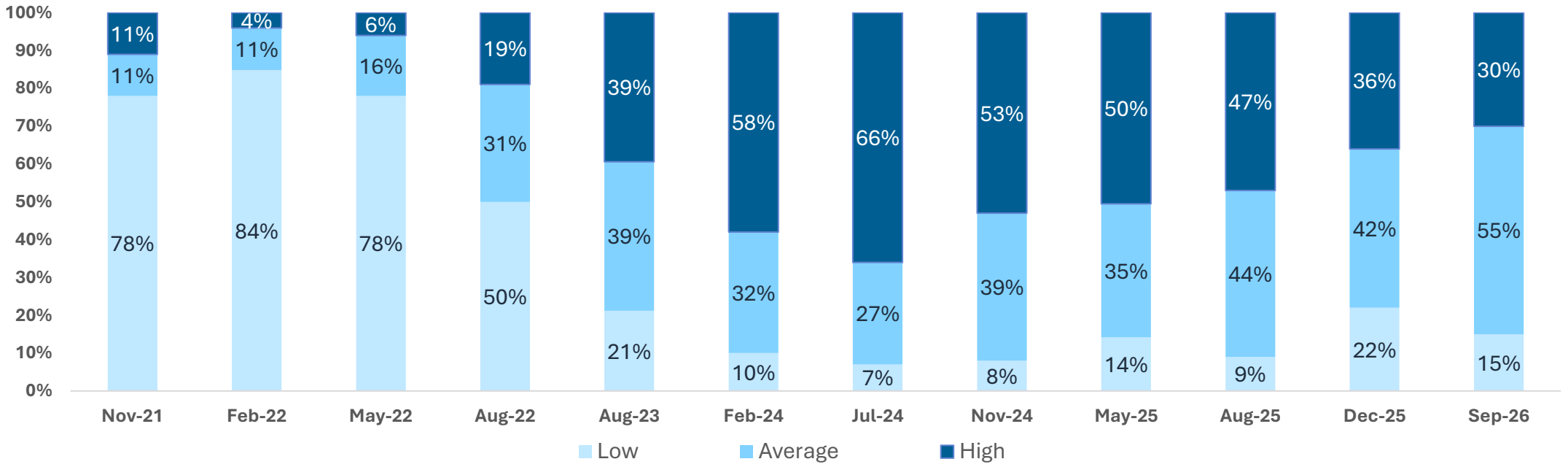
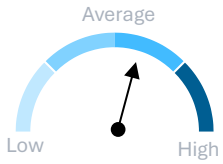
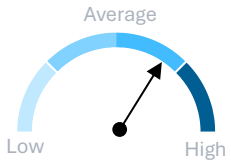
Current new tractor inventory levels are...

September 2026 new tractor inventory continued normalising: average rose to 55% from 42% in December 2025, while high inventory fell from 36% to 30% and low declined to 15%. State barometers are balanced, with Victoria and Tasmania leaning lower overall.

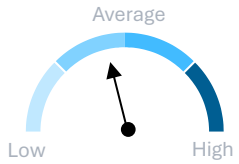




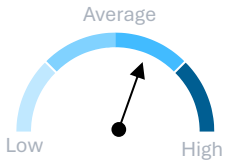
National



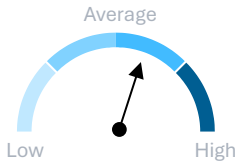
New South Wales



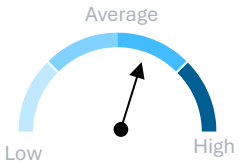
Victoria



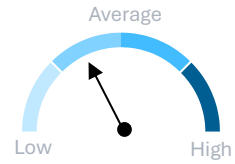
Queensland / NT



South Australia



Western Australia



Tasmania

Q12: Do you think your current new tractor inventory levels are...; n=131 (n=1 removed – not applicable)

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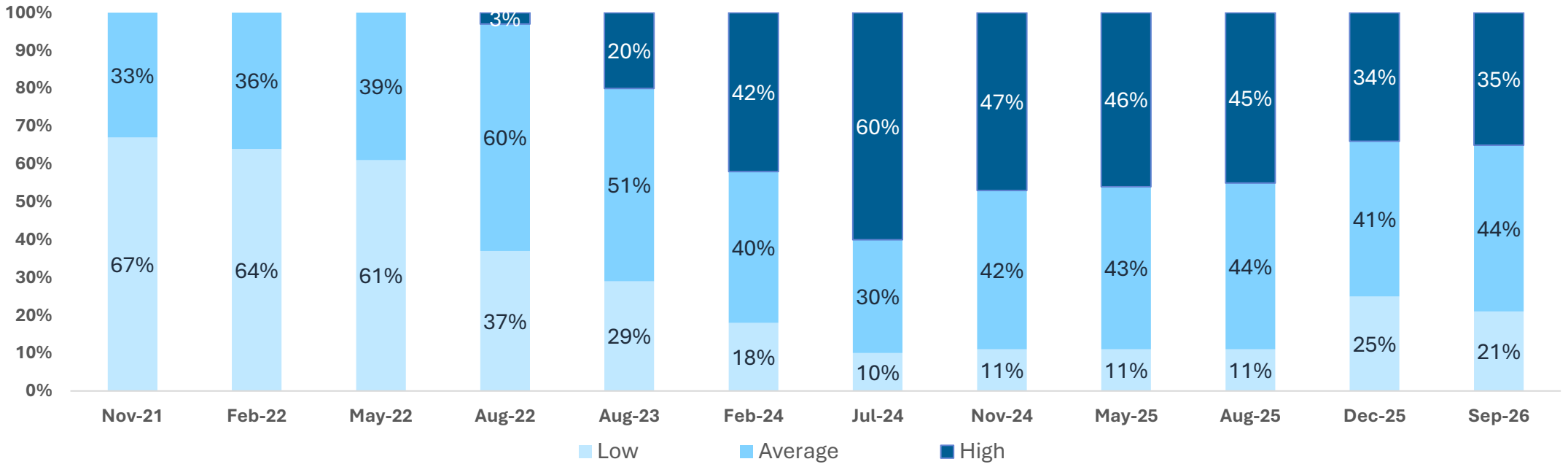
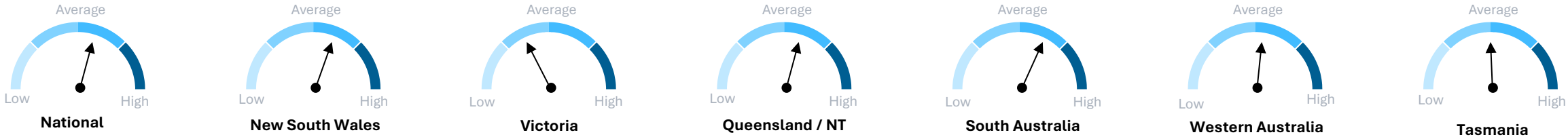
Current new combine harvester inventory levels are...

September 2026 combine harvester inventories remained balanced: average rose to 44% from 41% in December 2025, low fell from 25% to 21%, and high edged up to 35%. State barometers show Victoria lower, with Tasmania and Western Australia near average.





Q13: Do you think your current new combine harvester inventory levels are...; n=63 (n=69 removed – not applicable)

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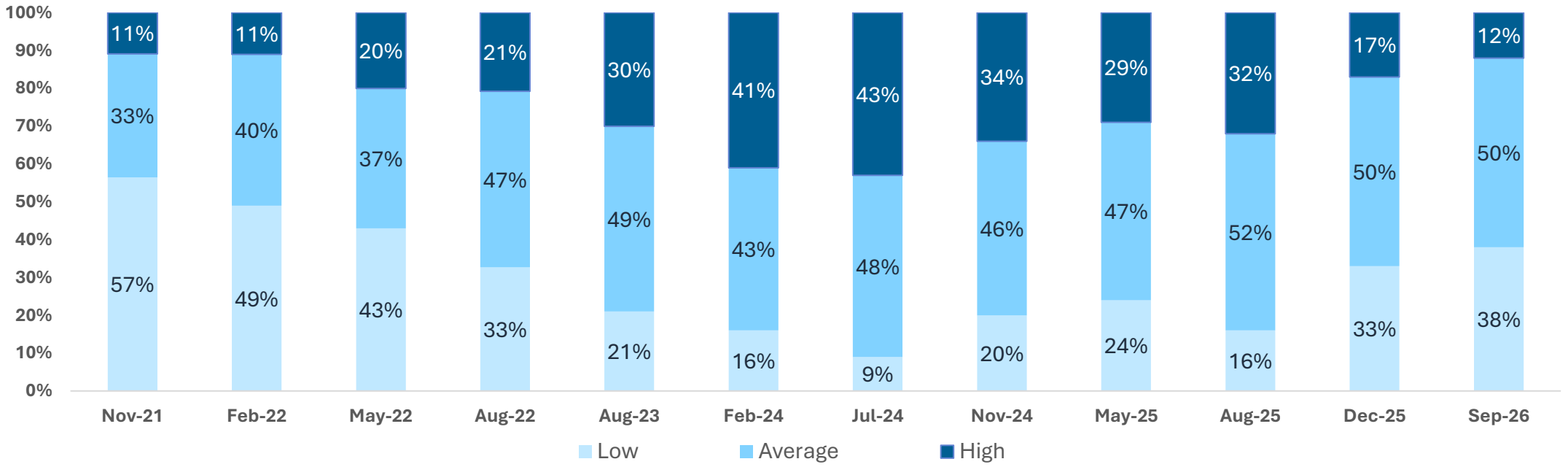
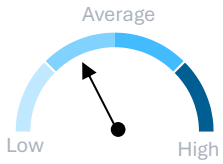
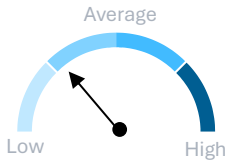
Current new baler and hay tools inventory levels are…

September 2026 baler and hay tools inventories shifted lower: low rose to 38% from 33% in December 2025, average held at 50%, and high fell to 12% from 17%. Barometers lean low across states, while Queensland/NT is closest to average.

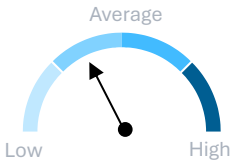




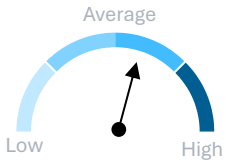
National



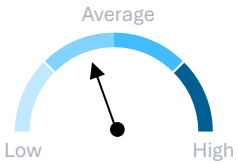
New South Wales



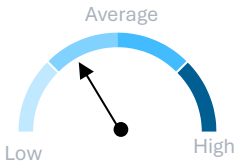
Victoria



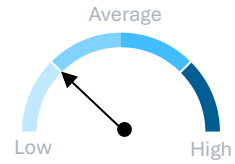
Queensland / NT



South Australia



Western Australia



Tasmania

Q14: Do you think your current new baler & hay tools inventory levels are…; n=116 (n=16 removed – not applicable)

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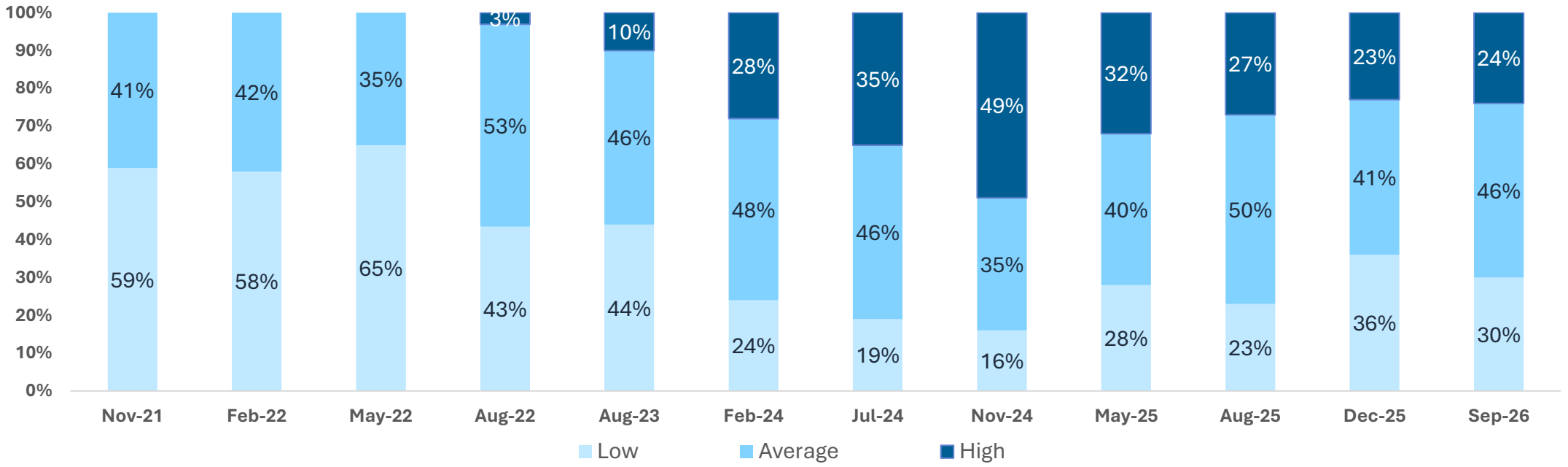
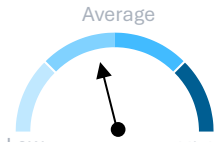
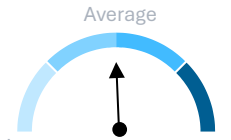
Current new SP sprayer inventory levels are...

September 2026 SP sprayer inventories moved toward balance: average reached 46%, up from 41% in December 2025; low fell from 36% to 30%, while high rose to 24%. State barometers cluster near average, with Victoria lower and South Australia higher.

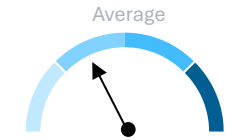




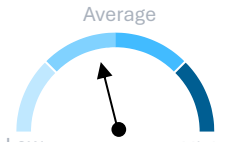
National



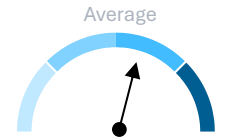
New South Wales



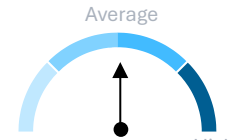
Victoria



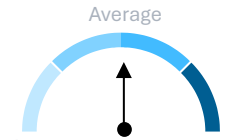
Queensland / NT



South Australia



Western Australia



Tasmania

Q15: Do you think your current new SP sprayer inventory levels are...; n=84 (n=48 removed – not applicable)

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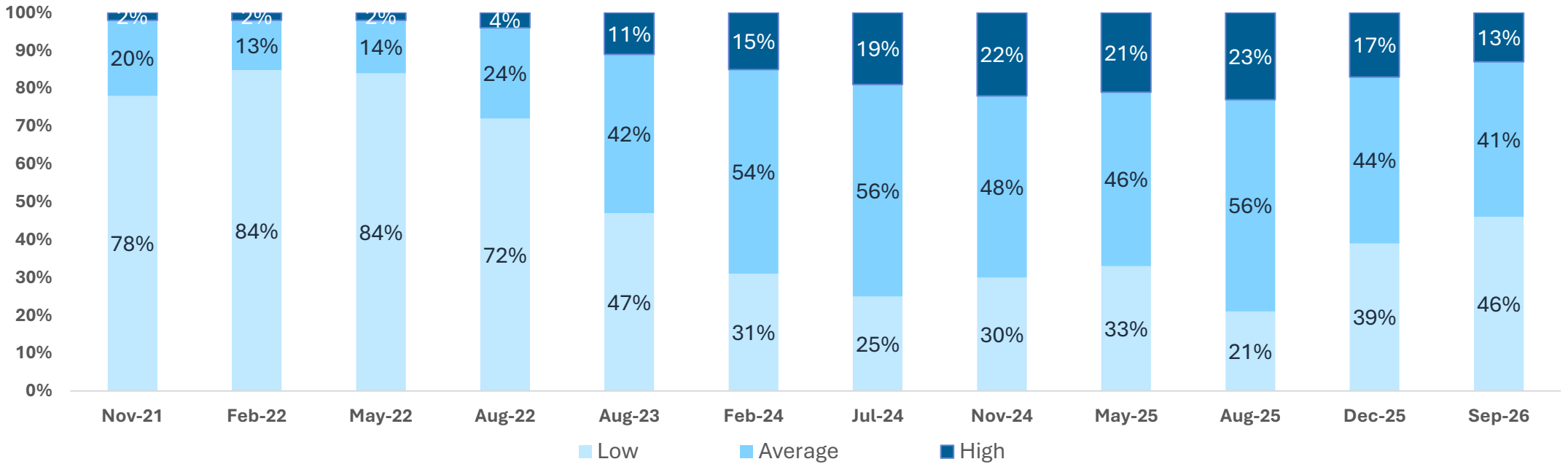
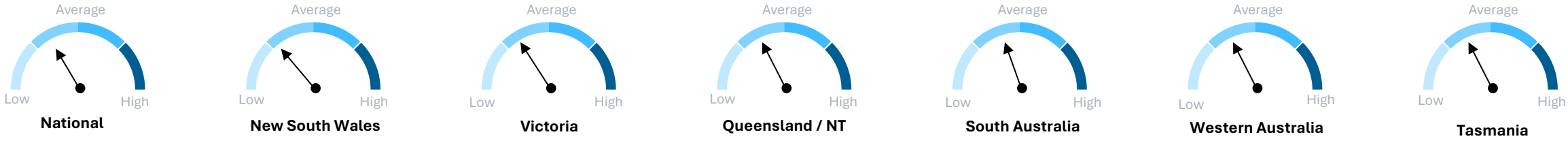
Current used tractor inventory levels are...

September 2026 used tractor inventory levels eased from elevated 2024-25 highs, with low inventory rebounding to 46% and high inventory falling to 13%. All states are reporting current tight inventories in this market.





Q17: Do you think your current used tractor inventory levels are...; n=129 (n=3 removed – not applicable)

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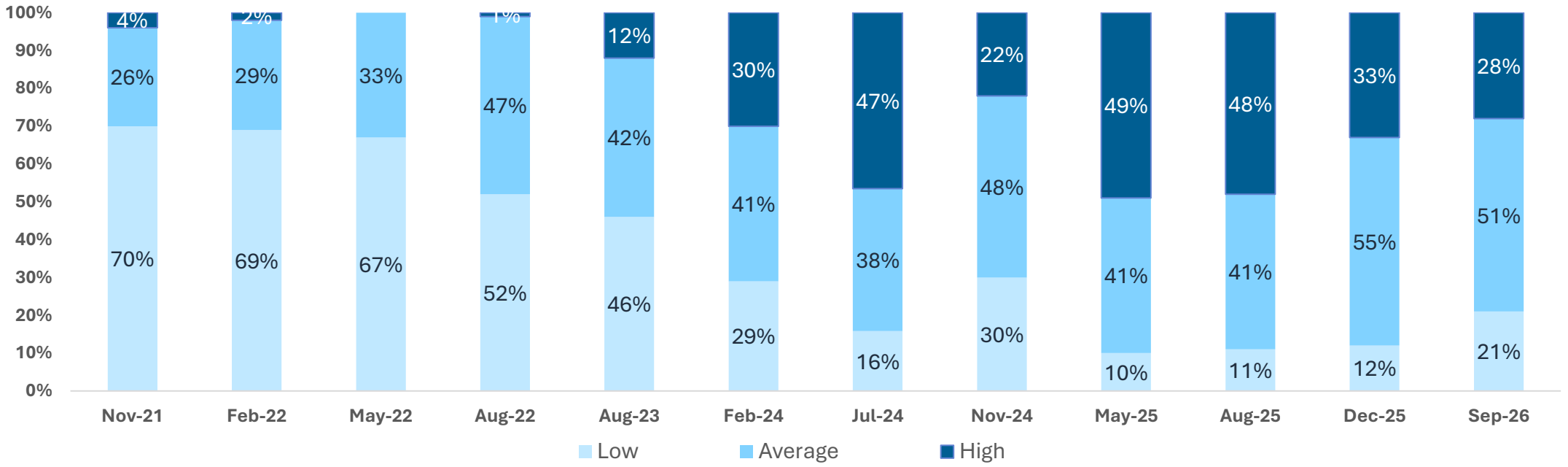
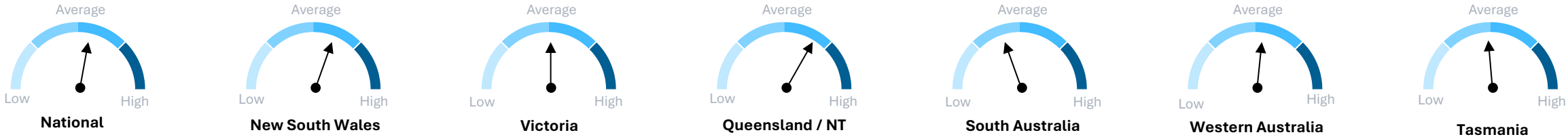
Current used combine harvester inventory levels are...

September 2026 used combine harvester inventory levels softened from the elevated conditions seen through 2024-25, with high inventory easing to 28% from 48-49% and low inventory lifting to 21%. Inventory sentiment remains strongest in Queensland/NT and NSW, while Victoria, WA and Tasmania sit near average levels.





Q18: Do you think your current used combine harvester inventory levels are...; n=61 (n=71 removed – not applicable)

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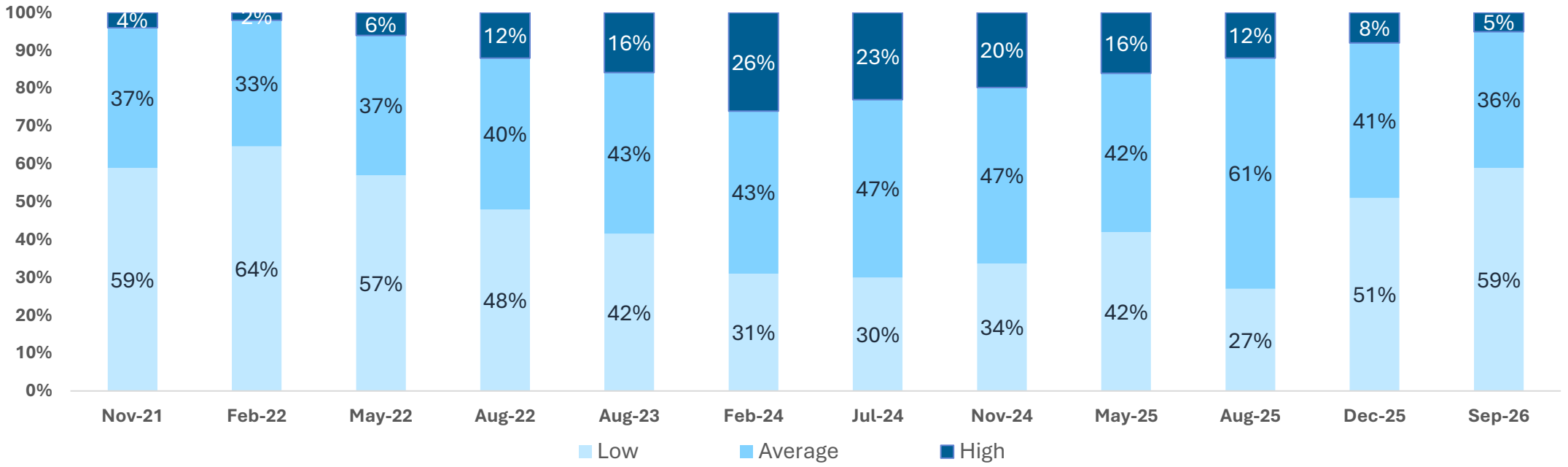
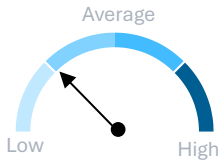
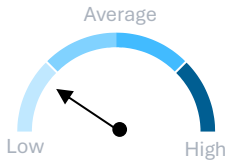
Current used baler and hay tools inventory levels are…

In September 2026, low inventory reached 59%, up eight points since December; average fell five points to 36%, while high dropped three points to 5%. Every state remains below average, with Western Australia lowest and Queensland–NT and Tasmania closest to average.

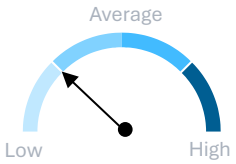




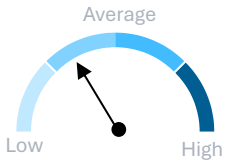
National



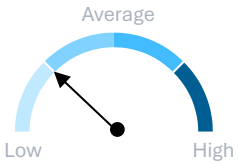
New South Wales



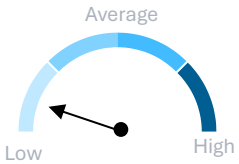
Victoria



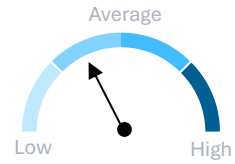
Queensland / NT



South Australia



Western Australia



Tasmania

Q19: Do you think your current used baler and hay tools inventory levels are…; n=105 (n=27 removed – not applicable)

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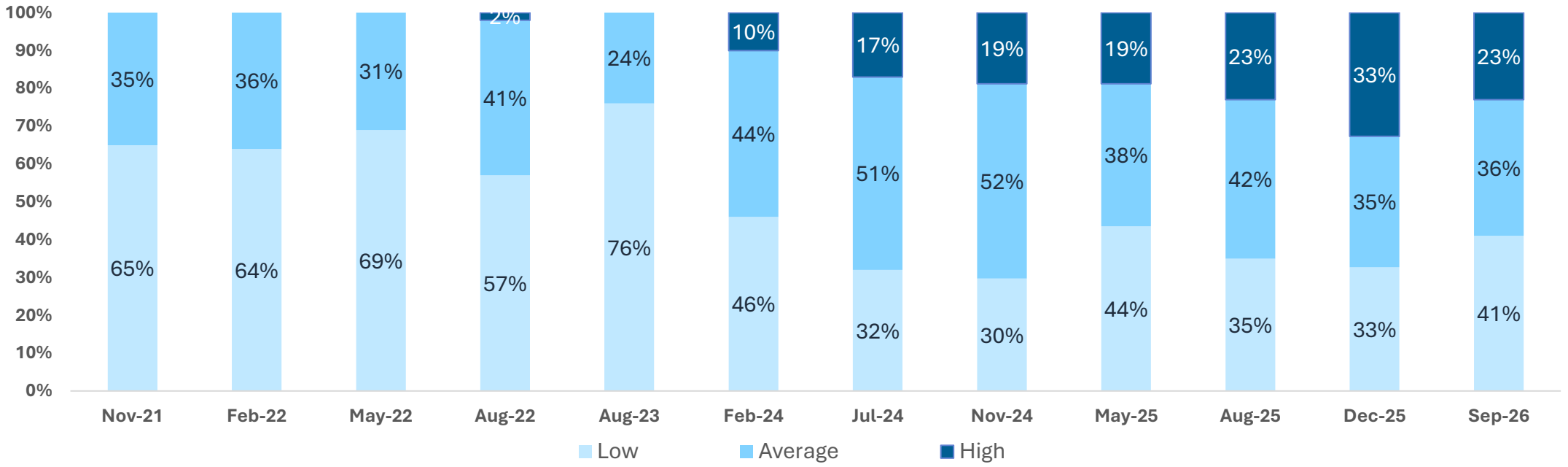
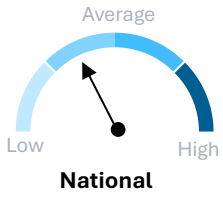
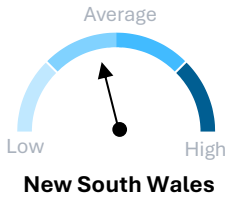
Current used SP sprayer inventory levels are...

In September 2026, 41% reported low SP sprayer inventory, up eight points since December, while average edged up one point to 36% and high fell ten points to 23%. State barometers cluster near average, with Victoria and Queensland/NT notably lower.

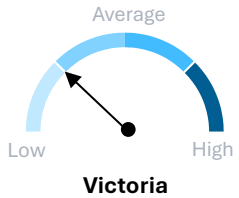




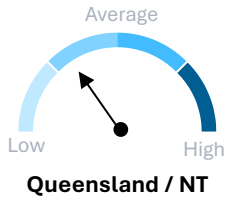
National



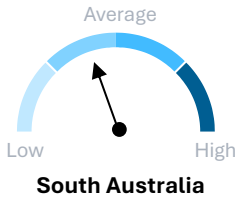
New South Wales



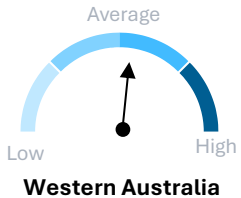
Victoria



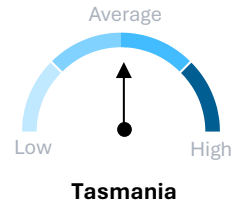
Queensland / NT



South Australia



Western Australia



Tasmania

Q20: Do you think your current used SP sprayer inventory levels are...; n=74 (n=58 removed – not applicable)

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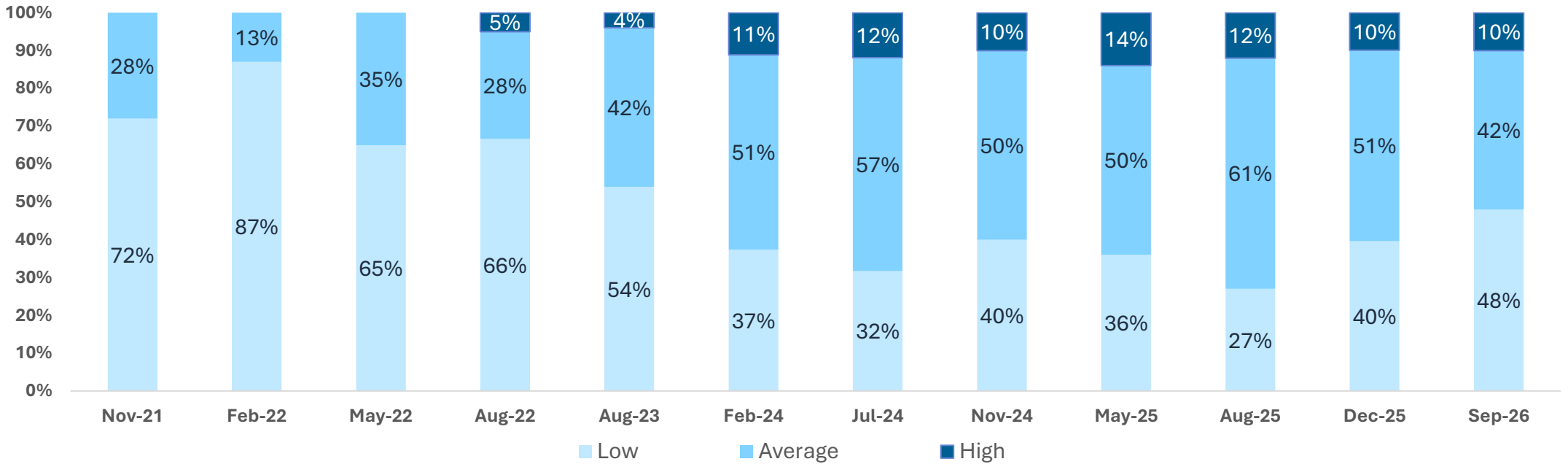
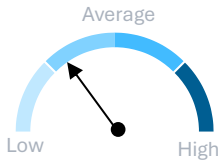
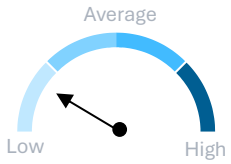
Current used implement inventory levels are...

In September 2026, low used implement inventory reached 48%, up eight points since December, while average fell nine points to 42% and high held at 10%. State barometers sit below average overall, with Victoria and Tasmania lowest and Queensland/NT strongest.

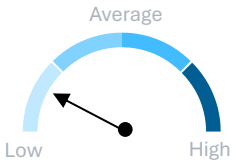




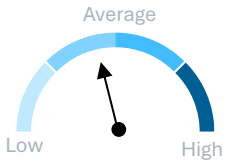
National



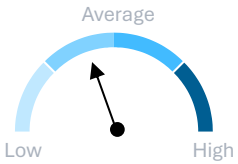
New South Wales



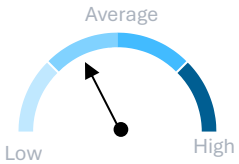
Victoria



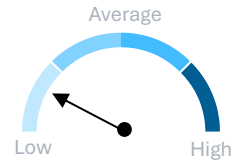
Queensland / NT



South Australia



Western Australia



Tasmania

Q21: Do you think your current used implement inventory levels are...; n=114 (n=18 removed – not applicable)

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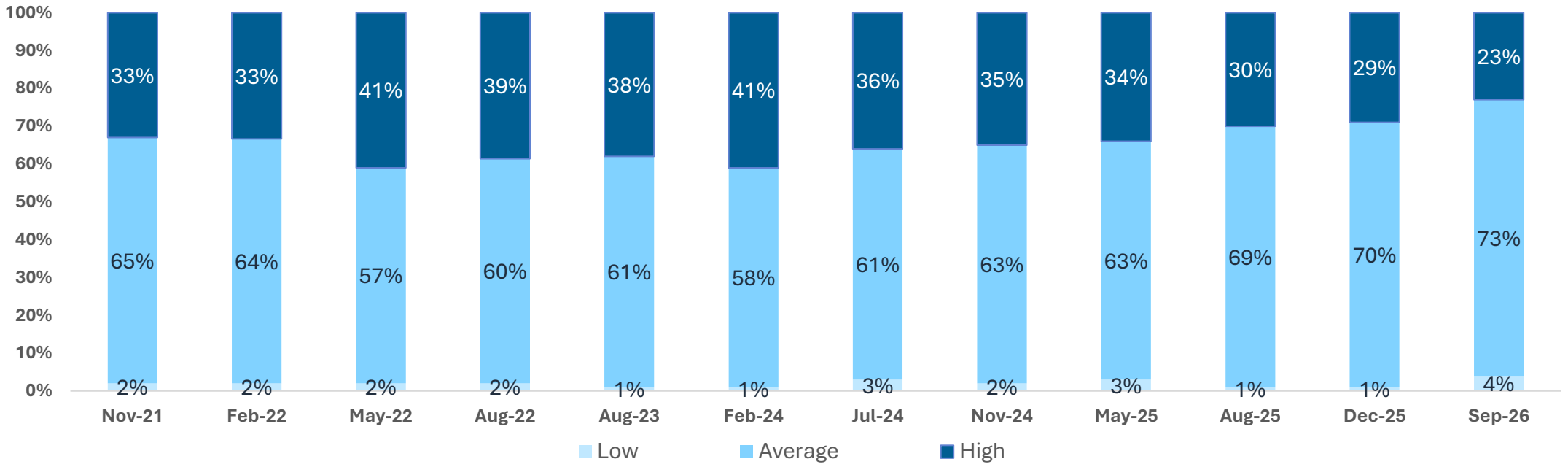
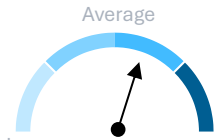
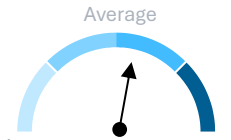
Parts inventory levels are...

In September 2026, 73% rated parts inventory average, up three points since December and the series high; high fell six points to 23%, its lowest reading, while low rose to 4%. State barometers centre near average, led by South Australia.

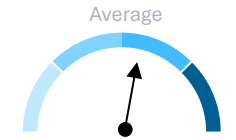




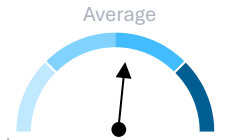
National



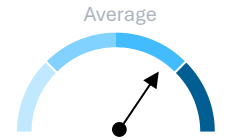
New South Wales



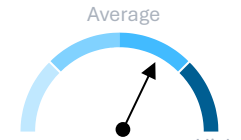
Victoria



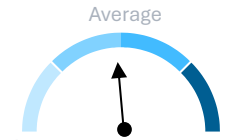
Queensland / NT



South Australia



Western Australia



Tasmania

Q22: Do you consider your parts inventory to be...; n=132

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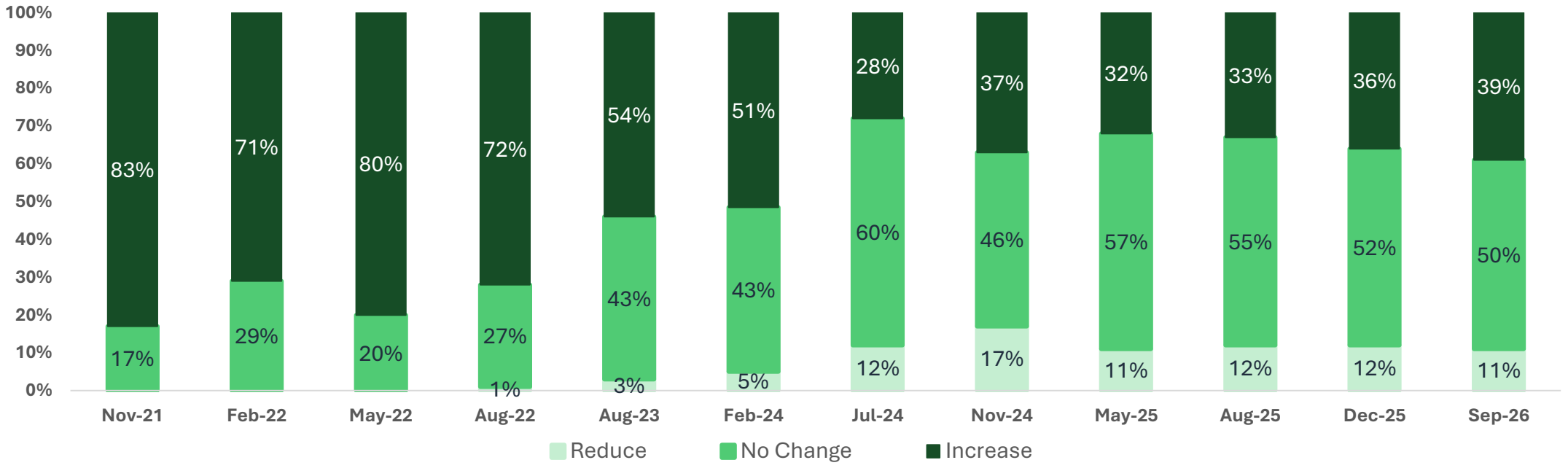
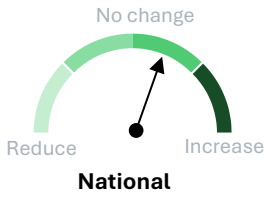
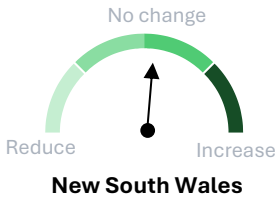
Workforce plan ...

In September 2026, 50% expected no change, while 39% planned increases and 11% reductions. Since December, hiring intentions rose three points as stability fell two and reductions eased one. State barometers show Western Australia strongest, with New South Wales neutral.





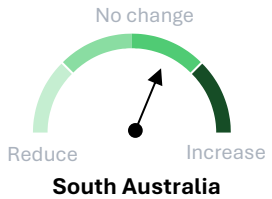
National



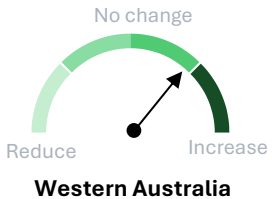
New South Wales

Victoria

Queensland / NT



South Australia



Western Australia

Tasmania

Q23: What are your plans regarding your workforce? ; n=132

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Overview of Dealer Network Health Assessment Findings – September 2026

- 132 dealers; VIC and NSW supplied 47% of responses.
- Turnover steady nationally; SA led, NSW trailed.
- Turnover outlook improved: 31% growth; SA strongest.
- Tractor outlook softened; SA led, NSW and QLD/NT lagged.
- Combine outlook improved; SA led, NSW trailed.
- Baler outlook improved; QLD/NT led, WA weakened.
- Sprayer outlook improved; WA led, NSW and QLD/NT lagged.
- Implement outlook mixed; SA led, NSW and QLD/NT leaned negative.
- Used equipment strongest: 46% growth; every state positive.
- After-sales positive nationwide; SA and TAS led.
- New tractor/combine stock normalised; VIC remained low.
- New baler stock tightened; sprayer stock moved toward balance.
- Used stock tightened broadly; WA weakest for balers.
- Parts stock healthy; SA led; used sprayer/implement stock low.
- Hiring positive: 39% expanding; WA strongest, NSW neutral.

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September 2026

Dealer Network Health Assessment

Australia

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