



## PRESS RELEASE

Paris, January 9, 2024

### Tractor registrations in France in 2023

41,554 tractors were registered for the first time in France in 2023. This is the third-highest total since 2010, after 2013 (47,656 first registrations that year) and 2012 (42,883). Standard tractors and telescopic loaders posted strong growth in 2023, unlike vineyard and orchard tractors, whose first registrations fell to a record low.

First-time registrations of agricultural tractors (including telescopic loaders) rose by +2.1% compared with 2022, to 41,554 units. This is 4.5% above the average for the last four years. In 2023, standard tractors will see the biggest percentage increase (+4.2%). Telescopic loaders and green space tractors also stand out, with positive year-on-year trends of +3.7% and +1.8% respectively.

#### First farm tractor registrations (2019–2023)

Tractor types	2019	2020	2021	2022	2023	Change 2023/2022	Evol. 2023/ Avg. 2019–2022
Standard tractors	25 743	23 896	24 522	25 140	<b>26 200</b>	4,2%	5,5%
Green spaces tractors	3 764	4 492	6 602	6 048	<b>6 154</b>	1,8%	17,7%
Telescopic loaders	5 402	4 597	4 675	4 979	<b>5 161</b>	3,7%	5,0%
Tractors for vineyards and orchards	4 096	3 799	4 315	3 693	<b>3 303</b>	-10,6%	-16,9%
Other tractors *	1 096	694	733	851	<b>736</b>	-13,5%	-12,7%
<b>Total farm tractors</b>	<b>40 101</b>	<b>37 478</b>	<b>40 847</b>	<b>40 711</b>	<b>41 554</b>	<b>2,1%</b>	<b>4,5%</b>

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

Source: Axema - DIVA / APS-SIV

NB: the volumes shown above may have changed since our previous editions, due to changes in DIVA's counting methodology and model repository.



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**Standard tractors & vineyards and orchards :  
John Deere still leader, New Holland takes second place,  
Fendt completes the podium**

For all standard, vineyard and orchard tractors, i.e. 29,503 registered tractors, the top 5 brands in 2023, in descending order of importance, are : John Deere (6,668 registered tractors, 22.6% market share), New Holland (4,480 registered tractors, 15.2% market share), Fendt (3,976 registered tractors, 13.5% market share), Claas (2,999 registered tractors, 10.2% market share) and Massey Ferguson (2,758 registered tractors, 9.4% market share).

New Holland regains second place, at the expense of Fendt. The three biggest gains in 2023 will go to New Holland (+1.6 market share points), Deutz-Fahr (+0.5 points) and John Deere (+0.3 points).

**Distribution of first registrations of standard tractors, vineyards and orchards by brand (2019-2023)**

	2019	2020	2021	2022	2023
JOHN DEERE	18,2%	19,9%	20,4%	22,3%	<b>22,6%</b>
NEW HOLLAND	16,5%	14,8%	15,2%	13,6%	<b>15,2%</b>
FENDT	13,5%	14,5%	13,5%	14,0%	<b>13,5%</b>
CLAAS	10,5%	10,9%	10,5%	10,2%	<b>10,2%</b>
MASSEY FERGUSON	9,8%	9,9%	8,4%	10,1%	<b>9,4%</b>
CASE IH	8,8%	7,9%	7,9%	7,6%	<b>7,8%</b>
VALTRA	5,9%	5,1%	5,5%	6,7%	<b>6,6%</b>
DEUTZ-FAHR	4,6%	5,2%	5,3%	4,5%	<b>5,0%</b>
KUBOTA	6,0%	5,4%	5,8%	4,9%	<b>4,3%</b>
McCORMICK	1,1%	1,2%	2,0%	1,7%	<b>1,3%</b>
SAME	1,5%	1,8%	1,7%	1,0%	<b>1,2%</b>
LANDINI	1,4%	1,1%	1,5%	1,4%	<b>1,0%</b>
LAMBORGHINI	0,6%	0,7%	0,6%	0,6%	<b>0,6%</b>
ANTONIO CARRARO	0,4%	0,5%	0,6%	0,5%	<b>0,5%</b>
LINDNER	0,2%	0,2%	0,2%	0,3%	<b>0,3%</b>
OTHER BRANDS	1,0%	0,9%	0,9%	0,6%	<b>0,5%</b>

Source: Axema - DIVA / APS-SIV

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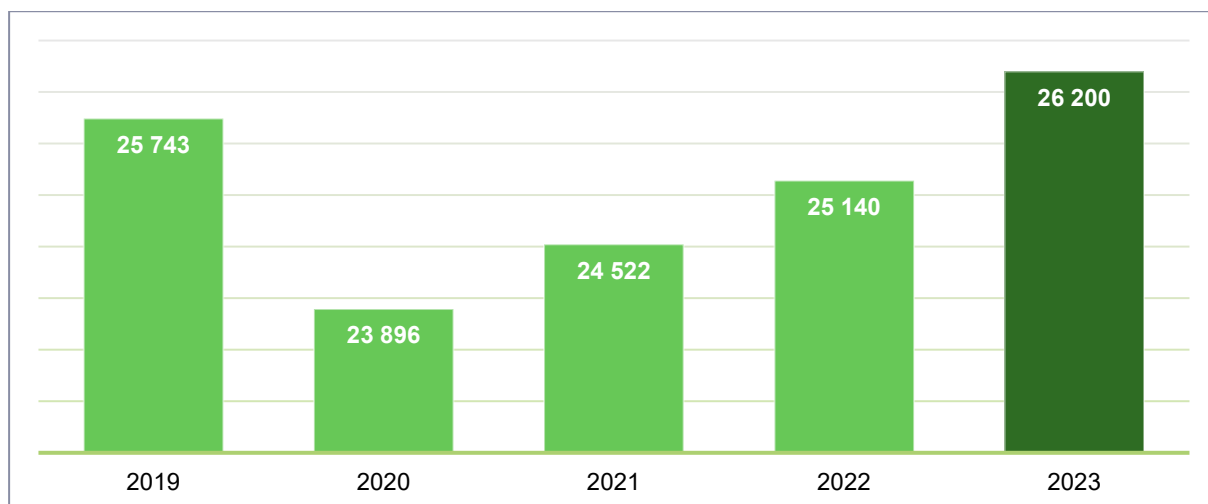
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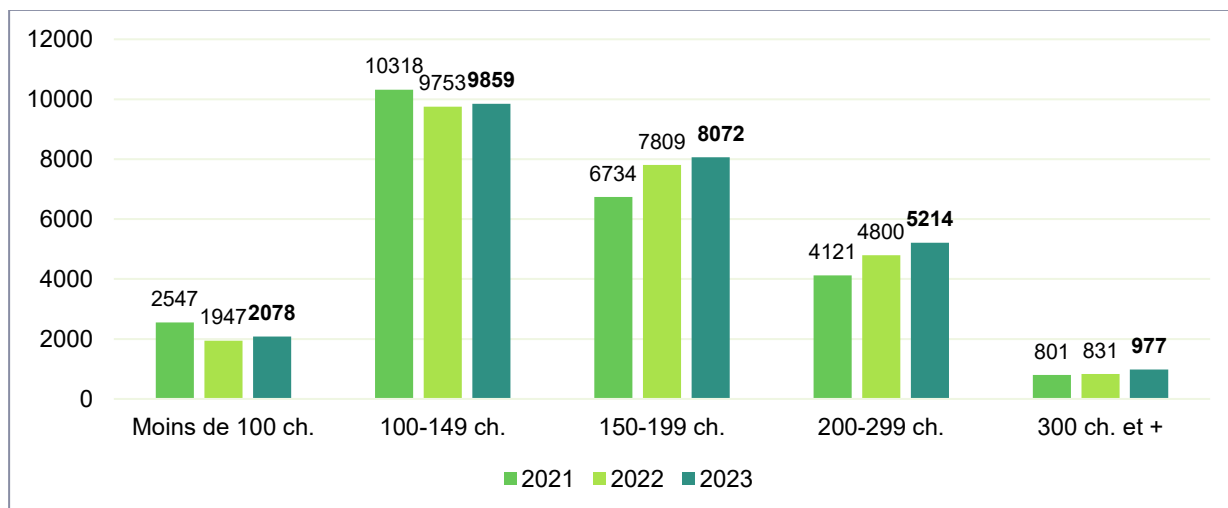
## Standard tractors: Third consecutive year of growth, average power up +2.5 hp compared to 2022

First registrations of standard tractors rise for the third year running (+4.2% in 2023, after +2.5% in 2022) to 26,200 units. The average horsepower of standard tractors continues to rise, reaching 163.5 hp in 2023 (versus 161 hp in 2022). Of particular note is the strong growth in tractors over 300 hp (+17.6%). The brand rankings remain unchanged from 2022. In 2023, John Deere will be on the podium, followed by New Holland and Fendt. In a ranking that is very stable compared to the previous year, the biggest increases in market share are attributable to New Holland (+1.4 pt), Case IH (+0.4 pt) and Deutz-Fahr (+0.3 pt).

### Trend in first registrations of standard tractors (2019-2023)



### Trend in first registrations by power band (2021-2023)



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## Breakdown of first registrations of standard tractors by make (2019–2023)

	2019	2020	2021	2022	2023
JOHN DEERE	20,3%	22,4%	23,4%	25,1%	25,1%
NEW HOLLAND	15,5%	14,2%	14,4%	13,6%	15,0%
FENDT	12,9%	13,8%	13,2%	12,9%	12,8%
CLAAS	11,1%	11,7%	11,5%	10,7%	10,4%
MASSEY FERGUSON	10,2%	10,3%	8,7%	10,6%	9,6%
CASE IH	9,5%	8,4%	8,2%	8,3%	8,7%
VALTRA	6,8%	5,9%	6,3%	7,6%	7,4%
DEUTZ-FAHR	4,9%	5,3%	5,3%	4,2%	4,5%
KUBOTA	5,3%	4,9%	5,4%	4,1%	4,1%
McCORMICK	0,6%	0,6%	1,2%	0,9%	0,8%
SAME	0,9%	0,8%	0,6%	0,4%	0,3%
LINDNER	0,3%	0,2%	0,3%	0,3%	0,3%
JCB	0,4%	0,4%	0,3%	0,3%	0,3%
LAMBORGHINI	0,4%	0,4%	0,3%	0,2%	0,3%
LANDINI	0,5%	0,2%	0,4%	0,3%	0,2%
OTHER BRANDS	0,4%	0,5%	0,5%	0,5%	0,3%

Source: Axema - DIVA / APS-SIV

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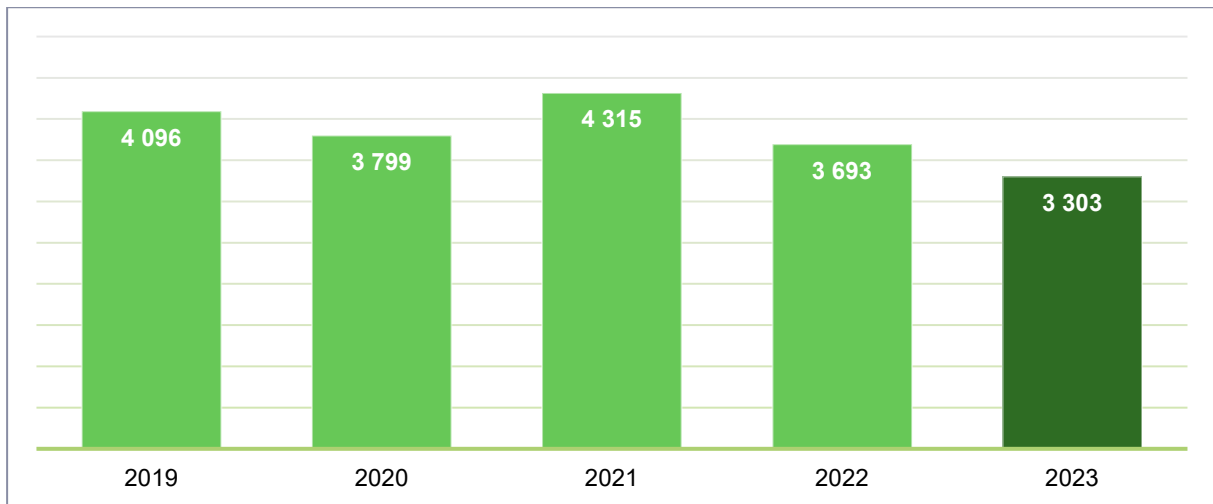
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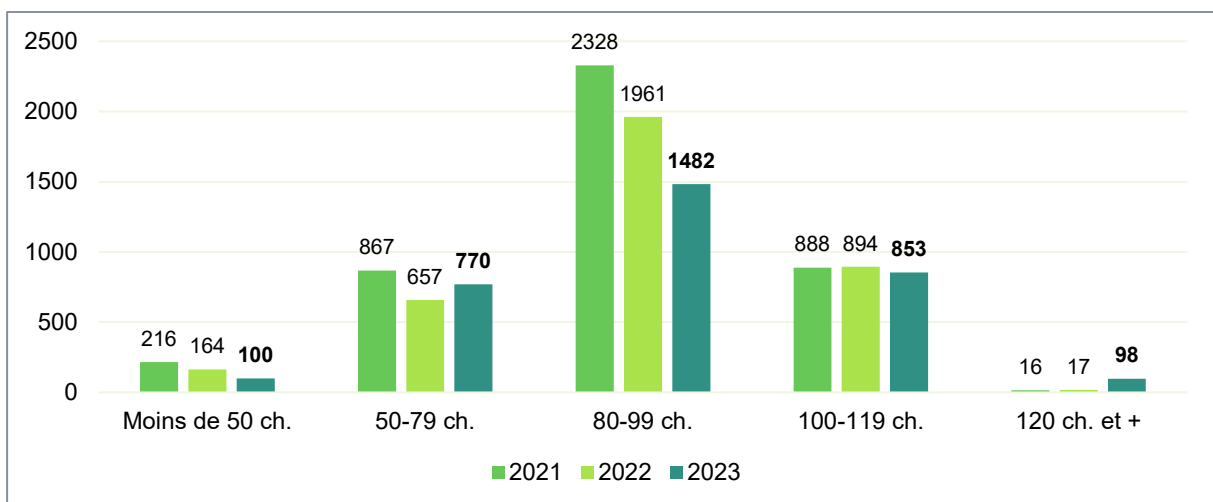
## Tractors for vineyards and orchards : Registrations at their lowest level since 2013 and a new ranking in 2023

First registrations of vineyard and orchard tractors fall sharply, for the second year running, to their lowest level in ten years. In 2023, average power will rise slightly from 88.2 to 89 hp. The 50-79 horsepower category proved the most resilient in 2023, with growth of +17.2%. In a contracting market, the brand rankings have been turned upside down: Fendt and New Holland are still at the forefront, with 19% and 17% of first registrations respectively. Deutz-Fahr takes third place. In 2023, New Holland (+3.0 pts), Deutz-Fahr (+2.5 pts) and Same (+2.0 pt) are expected to make the biggest gains in market share.

### Trend in first registrations of vineyard and orchard tractors (2019-2023)



### Trend in first registrations by power band (2021-2023)



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## Breakdown of first registrations of vineyard and orchard tractors by brand (2019-2023)

	2019	2020	2021	2022	2023
FENDT	17,1%	19,3%	15,6%	21,4%	19,0%
NEW HOLLAND	22,9%	18,4%	19,9%	14,0%	17,0%
DEUTZ-FAHR	2,7%	4,6%	5,3%	5,9%	8,4%
CLAAS	6,9%	6,0%	4,9%	6,6%	7,9%
LANDINI	7,1%	6,8%	7,8%	8,8%	7,7%
SAME	5,4%	7,9%	7,6%	5,7%	7,7%
MASSEY FERGUSON	6,9%	7,1%	6,7%	6,6%	7,3%
KUBOTA	10,1%	8,0%	7,8%	9,9%	5,7%
McCORMICK	4,2%	5,0%	7,1%	7,0%	5,3%
ANTONIO CARRARO	3,0%	3,7%	3,7%	4,1%	4,8%
LAMBORGHINI	2,4%	2,6%	2,2%	3,0%	3,6%
JOHN DEERE	4,7%	4,2%	3,1%	2,7%	3,0%
CASE IH	4,9%	4,5%	6,0%	2,8%	1,0%
FERRARI	0,7%	0,8%	0,7%	0,4%	0,9%
VALTRA	0,0%	0,4%	0,8%	0,8%	0,4%
OTHER BRANDS	1,0%	0,7%	0,8%	0,3%	0,3%

Source: Axema - DIVA / APS-SIV

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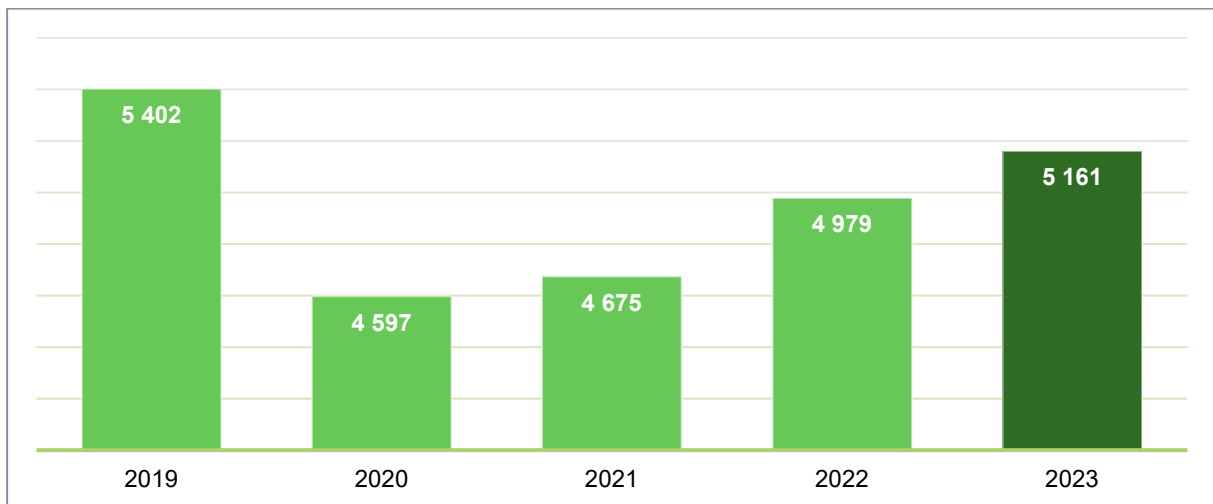
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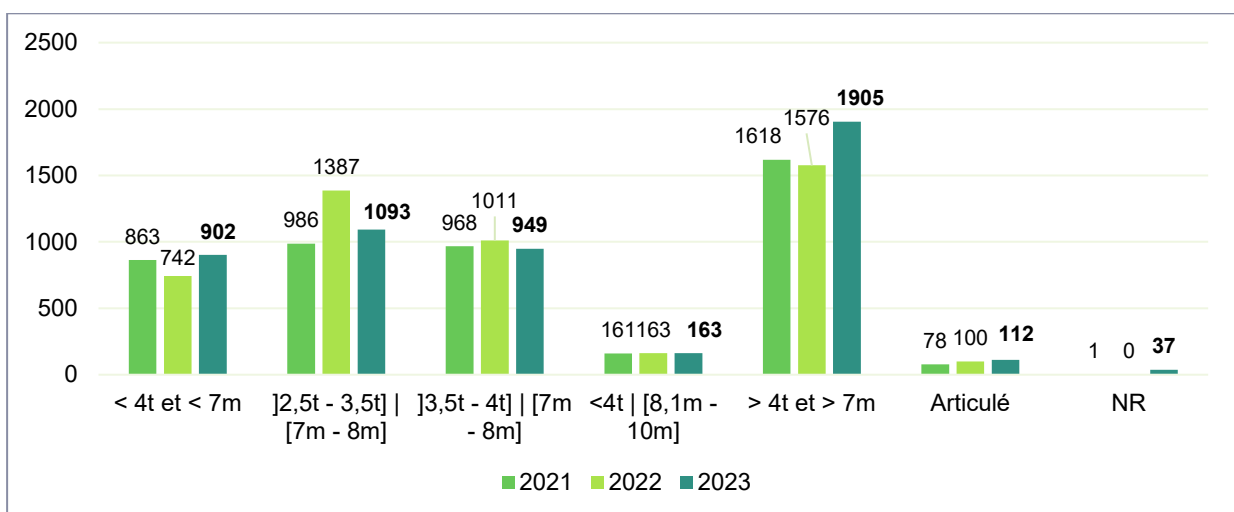
Telescopic loaders :  
 Another very good year for loaders, the 5000-unit mark reached  
 crossed again

First registrations of telescopic handlers once again break the 5,000-unit barrier. Since 2010, this has only happened twice, in 2019 and, therefore, in 2023. First registrations of telescopic loaders rose by +3.7% over the year as a whole. The best performance was seen in the category of loaders over 4 tons and 7 meters. Brand rankings remain unchanged in the top 5. Manitou (31% of first registrations), JCB (25.9%) and Merlo (12.8%) take the top three places. The three biggest increases in market share in 2023 will go to Kramer (+2.5 pts), Weidemann (+1.5 pt) and Massey Ferguson (+0.4 pt).

Trend in first registrations of telescopic handlers (2019-2023)



Trend in first registrations by segmentation (2021-2023)



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### Breakdown of first telescopic handler registrations by brand (2019-2023)

	2019	2020	2021	2022	2023
MANITOU	32,7%	32,2%	31,0%	31,5%	31,0%
JCB	26,2%	26,7%	27,8%	27,4%	25,9%
MERLO	12,7%	15,1%	12,6%	13,2%	12,8%
KRAMER	5,2%	5,9%	8,6%	8,0%	10,5%
BOBCAT	4,1%	3,9%	5,7%	5,8%	5,6%
MASSEY FERGUSON	3,9%	3,2%	3,0%	3,3%	3,7%
CLAAS	6,3%	4,7%	4,6%	4,8%	3,5%
NEW HOLLAND	2,4%	3,1%	2,7%	2,9%	2,2%
DIECI	1,2%	1,3%	1,0%	1,4%	1,6%
WEIDEMANN	0,5%	0,2%	0,0%	0,1%	1,6%
CASE IH	0,6%	0,7%	0,9%	0,6%	0,6%
SCHAFFER	0,7%	0,3%	0,4%	0,2%	0,5%
KUBOTA	0,4%	0,2%	0,4%	0,4%	0,3%
FARESIN	0,1%	0,1%	0,1%	0,0%	0,1%
OTHER BRANDS	3,0%	2,4%	1,2%	0,4%	0,1%

Source: Axema - DIVA / APS-SIV

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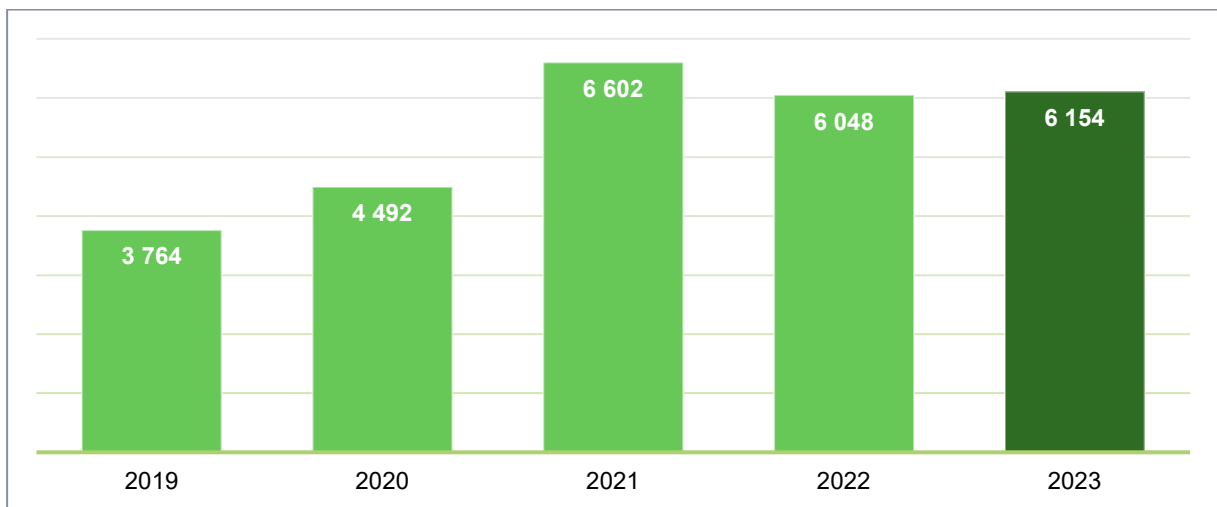




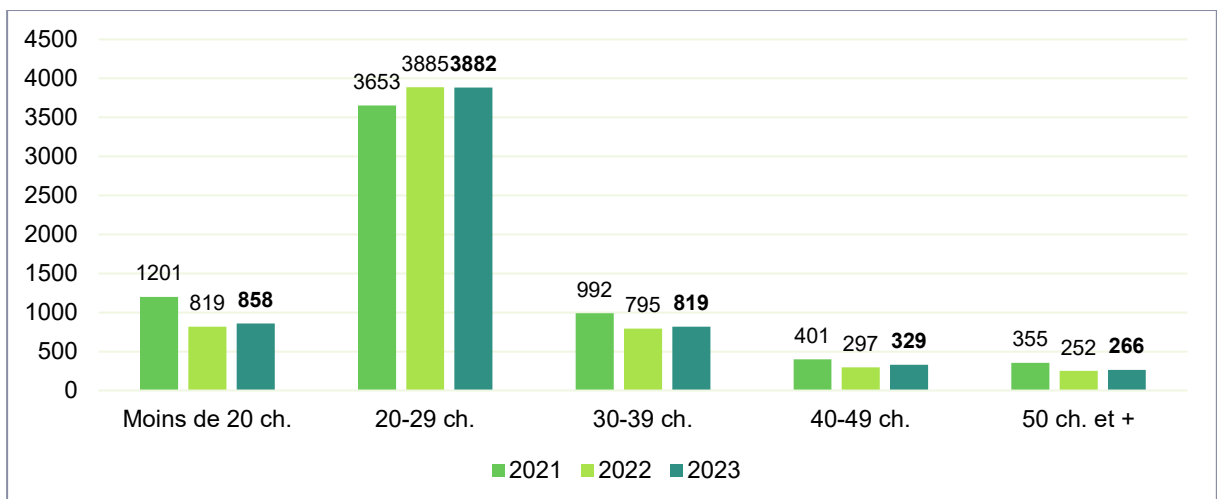
## Green spaces tractors: first registrations pass the 6,000 mark for the third year running

First-time registrations of landscape tractors rose by 1.8% in 2023, to 6,154 units. The structure of registrations by horsepower bracket has changed little in recent years. The average horsepower was 25 in 2023, compared with 27 the previous year. Tractors in the 20 to 29 hp range form the core of the market, accounting for 63% of first registrations in 2023. In 2023, 27 brands registered at least one landscape tractor in France. The top three players accounted for 64.3% of first registrations. Kubota regained first place from Solis, while Iseki consolidated its third place. Kubota (+5.4 pts), Farmtrac (+2.1 pts) and LS Tractor (+0.8 pt) will have the highest market share gains in 2023.

### Trend in first registrations of tractors for green spaces (2019–2023)



### Trend in first registrations by power band (2021–2023)



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### Breakdown of first registrations of green tractors by brand (2019-2023)

	2019	2020	2021	2022	2023
KUBOTA	29,9%	27,4%	23,8%	19,9%	25,3%
SOLIS	13,4%	18,1%	23,6%	26,2%	22,9%
ISEKI	14,5%	17,1%	17,9%	16,9%	16,0%
FARMTRAC	3,3%	5,0%	5,7%	7,4%	9,5%
JOHN DEERE	18,4%	13,4%	9,8%	10,0%	8,2%
KIOTI	8,3%	7,8%	7,1%	7,2%	7,0%
VST TILLERS	2,6%	3,1%	3,7%	4,9%	3,5%
LS TRACTOR	0,7%	0,1%	1,8%	0,6%	1,4%
YANMAR	0,7%	0,3%	0,7%	1,0%	1,3%
TYM	0,7%	0,8%	1,5%	1,0%	1,1%
OTHER BRANDS	7,5%	6,9%	4,4%	4,9%	3,8%

Source: Axema - DIVA / APS-SIV

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