FEDER UNACOMA
Italian Agricultural Machinery Manufacturers Federation

Press Release

Agricultural machinery: Italian market recovering, but exports slow down

The Italian market has turned positive driven mainly by public incentives, that are also expected to have a positive impact during the current year. However, purchases of second hand machinery remain too large, slowing down the renewal of the fleet. The domestic market accounts for 30% of the total sector's turnover, while the largest share comes from exports. Tariffs, geopolitical tensions and economic uncertainty are reducing Italian exports, which have fallen by an overall 4.8% and show a 34% deficit on the US market.

EIMA International, the world exhibition of agricultural machinery, which will hold its 47th edition from 10 to 14 November at the Bologna exhibition centre, has always been a privileged venue for meeting demand and monitoring market potential in different countries. The strategic role of the Bologna exhibition emerges even more strongly at a time like the present, marked by a rapid transformation of market geography and by the commitment of the entire agricultural machinery sector to analysing scenarios and seeking new opportunities. This was the message launched by FederUnacoma President Mariateresa Maschio during the press conference presenting EIMA 2026, held this afternoon in Verona as part of Fieragricola.

"The Italian market is showing signs of recovery," said the manufacturers' association President, "and the 2025 results recorded a rebound in sales, both for tractors (+13.7%, with 17,600 units registered) and for other types of machinery, all of which were positive with the sole exception of combine harvesters." Public incentives have had a major impact on the dynamism of the national market: the ISI/INAIL call for tenders (increased to a total of €248 million by the end of the year, plus €90 million under the new programming period), the Innovation Fund (now concluded, but still having positive effects on the market in the first months of the new year), the 4.0 tax credit, the Rural Development Programmes (RDPs), and the ZES funds for Southern Italy.

"The domestic market, however, still presents critical issues," Mariateresa Maschio added, "largely due to insufficient farm profitability, which discourages investment in the purchase of cutting edge technologies and instead favours the used machinery market. These are mostly very old machines, with an average age of over 22 years, that therefore do not meet the efficiency and reliability standards required by modern agriculture."

In 2025, the used tractor market reached its all-time high, growing by 6% and thus confirming a trend that has lasted for more than a decade. Between 2014 and 2025, purchases of used tractors more than doubled, rising from 25,000 to over 60,000 units. "This trend must be curbed," said Mariateresa Maschio, "because it slows down the innovation process in the primary sector. This will only be possible through a multi-year incentive policy and a new marketing approach which, combined with training activities for operators, highlights the quality and usefulness of new technologies."

The resilience of the domestic market, however, is not sufficient to support the agricultural machinery industry, which—as recalled during the press conference—generates only 30% of its turnover on the domestic market, while the remaining 70% comes from exports, which are currently affected by an unfavourable economic

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environment. “Geopolitical instability, trade sanctions and new customs barriers,” explained the President of FederUnacoma, “have penalised global trade in agricultural machinery, estimated to be down by 2.1%, with a total value of €85.7 billion, and have consequently also penalised our sector’s exports.”

Istat (the Italian National Institute of Statistics) data on foreign trade updated to last October indicate a 4.8% decline in the value of Italian machinery exports compared to the same period in 2024, due mainly to the collapse of the US market (-34%). France (-7%) and Germany (-2%) also declined, becoming the first and second destination markets for Italian-made machinery. By contrast, exports to Spain (+31.3%) and Poland (+11.8%) increased, although not in volumes sufficient to offset the downturn in the main markets.

The industry’s strategy is now aimed at opening new outlets in India, Latin America and South-East Asia, also in order to compete for market share with emerging manufacturers from China and India. China, in particular, reached a 9% share of the European market in 2025 and a 12% share of the Italian market, offering low-cost technologies.

“We are in a phase of relaunch and repositioning of our sector,” concluded the President of FederUnacoma, “which requires well-structured public policies and which can leverage a trade fair event such as EIMA, conceived precisely to analyse market trends and to promote the internationalisation of our companies.”

Verona, February 4th, 2026

FEDER UNACOMA
Federazione Nazionale Costruttori
Macchine per l'Agricoltura

IMMATRICOLAZIONI-REGISTRATIONS GENNAIO/JANUARY-DICEMBRE/DECEMBER 2025

	TRATTRICI TRACTORS			MIETITREBBIATRICI COMBINE-HARVESTERS			TRATTRICI CON PIANALE DI CARICO TRANSPORTERS			RIMORCHI TRAILERS			SOLLEVATORI TELESCOPICI TELEHANDLERS		
REGIONI/REGIONS	2025	2024	Var. %	2025	2024	Var. %	2025	2024	Var. %	2025	2024	Var. %	2025	2024	Var. %
ABRUZZO	437	313	39,6%	*	5	-	14	12	16,7%	226	248	-8,9%	*	9	-
BASILICATA	383	287	33,4%	*	2	-	12	1	1100,0%	157	111	41,4%	*	12	-
CALABRIA	738	537	37,4%	0	2	-	28	15	86,7%	380	316	20,3%	*	3	-
CAMPANIA	1363	1196	14,0%	*	6	-	33	32	3,1%	505	445	13,5%	44	41	7,3%
EMILIA R.	1589	1383	14,9%	21	35	-40,0%	26	30	-13,3%	662	709	-6,6%	212	138	53,6%
FRIULI	345	387	-10,9%	*	4	-	3	4	-25,0%	235	210	11,9%	22	19	15,8%
LAZIO	915	754	21,4%	*	6	-	29	18	61,1%	434	443	-2,0%	20	23	-13,0%
LIGURIA	90	66	36,4%	*	0	-	61	23	165,2%	53	32	65,6%	*	0	-
LOMBARDIA	1844	1713	7,6%	33	36	-8,3%	130	87	49,4%	751	863	-13,0%	356	357	-0,3%
MARCHE	397	387	2,6%	29	27	7,4%	9	5	80,0%	145	148	-2,0%	51	38	34,2%
MOLISE	117	117	0,0%	*	5	-	3	3	0,0%	84	103	-18,4%	*	7	-
PIEMONTE	1667	1485	12,3%	39	53	-26,4%	86	65	32,3%	734	756	-2,9%	156	119	31,1%
PUGLIA	1821	1497	21,6%	22	12	83,3%	14	4	250,0%	585	441	32,7%	64	62	3,2%
SARDEGNA	574	516	11,2%	*	3	-	4	3	-	212	204	3,9%	15	11	36,4%
SICILIA	1253	1087	15,3%	15	17	-11,8%	22	30	-26,7%	541	409	32,3%	30	28	7,1%
TOSCANA	887	1023	-13,3%	15	11	36,4%	71	44	61,4%	315	355	-11,3%	26	31	-16,1%
TRENTINO	792	584	35,6%	*	0	-	124	72	72,2%	570	439	29,8%	28	16	75,0%
UMBRIA	443	426	4,0%	*	13	-	22	9	144,4%	116	121	-4,1%	*	13	-
VALLE D'AOSTA	35	34	2,9%	0	0	-	11	7	57,1%	46	29	58,6%	*	2	-
VENETO	1883	1658	13,6%	27	29	-6,9%	69	65	6,2%	1061	1122	-5,4%	159	116	37,1%
TOTALE	**17.573**	**15.450**	**13,7%**	**234**	**266**	**-12,0%**	**771**	**529**	**45,7%**	**7.812**	**7.504**	**4,1%**	**1.216**	**1.045**	**16,4%**

Dati Ministero Trasporti - Elaborazioni Ufficio Statistico FEDERUNACOMA
Ministry of Transport Data processed by FEDERUNACOMA Statistical Dept.

* Dati oscurati per adempiere ai dettami comunitari in merito alla divulgazione di elaborazioni statistiche in mercati oligopolistici

* Figures encoded in order to comply with the European Commission requirements concerning the publication of statistical data within oligopolistic markets

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