Show Report

May 7, 2025

AGRISHOW 2025

Power Systems Research
Data · Forecasting · Solutions™

www.powersys.com | +1-651-905-8400 | info@powersys.com

As part of our ongoing effort to collect industry intelligence and information on new products, analysts from Power Systems Research regularly attend major trade shows around the world. We share our findings with you in these Show Reports.

Agrishow 2025 Provides Innovations in Agricultural Equipment

Agrishow 2025, held April 28-May 2, 2025, in Ribeirão Preto, São Paulo, confirmed Brazil's leadership in Agricultural innovation. The show spotlighted sustainable tech, automation, and digital solutions, with both business deals and attendance increasing since the last show in 2024. The focus: boosting productivity, reducing environmental impact, and preparing for a tech-driven ag future.

Four representatives of the Power Systems Research South America Office representatives attended the 30th edition of Agrishow, Latin America's premier agricultural technology fair. The event showcased cutting-edge machinery, sustainable solutions, and the latest in precision agriculture.

Agrishow 2025 show drew 197,000 visitors, up slightly from 195,000 in 2024, and the 800+ exhibitors matched last year's count. This year's show floor covered 520,000 square meters, down slightly from 530,000 square meters in 2024.

However, business deals reportedly hit R$14.6 billion (US$2.6B), a 7% rise over 2024's R$13.6B.

IMPORTANT INSIGHTS

The Power Systems Research (PSR) representatives who attended the show spoke with many Agricultural Equipment Executives to get their perception on the business environment in the Agricultural segment. After a challenging period with a nearly 37% contraction between 2022 and 2024, there is a positive expectation for recovery on Brazil's agricultural machinery industry.

Some of key insights collected to justify this recovery include:

- **Revenue Growth:** A 17% increase in the first two months of 2025, with domestic sales up by 15.1%.
- **Projected Growth:** An anticipated 8.2% increase in net revenue for the sector in 2025, driven by favorable weather conditions and a record soybean harvest.
- **Latin American Market:** Expected to reach USD 8.76 billion in 2025, growing at a CAGR of 4.3% to USD 10.81 billion by 2030. Government subsidies and increased mechanization are key drivers.

Show Report Author

Fabio Ferraresi is Director, Business Development, South America at Power Systems Research

CONTACT US FOR DETAILS

+1 651.905.8400 | info@powersys.com

KEY TRENDS AND INNOVATIONS

Several key trends stood out at the show, including:

- **Sustainability:** John Deere launched an ethanol-powered 8R tractor, spotlighting renewable fuels.
- **Automation & AI:** Harvesters with automatic terrain adjustment and predictive harvest automation (S5, S7 models).
- **Drones:** FieldXplorer (aerial scouting) and XAG spraying drones for targeted crop care.
- **High-Capacity Machinery:** New Holland's CR10/CR11 combines (Latin American debut), MF 2234 prismatic baler, Fendt IDEAL 25 harvester.
- **Materials Innovation:** Massey Ferguson's new sprayer boom uses steel, aluminum, and carbon fiber for lighter, more efficient operation.
- **Electrification & Autonomy:** Danfoss and others focused on electrified, autonomous machinery for efficiency and safety.
- **Precision Ag:** Emphasis on digital agriculture, data-driven decision-making, and smart irrigation.

SEMINARS AND FORUMS

Education is always an important portion of this show and the 2025 edition was no exception. This year, presentations focused on:

- Digital agriculture
- Renewable energy in farming
- Global ag market trends
- Sustainability and climate-resilient practices

PRODUCT SHOWCASE AGRISHOW 2025

Here is a sampling of the innovative new products that PSR representatives saw at the show.

NEW HOLLAND Celebrating 50 years in Brazil, New Holland introduced over 15 new products, including:

- **CR11 Twin Rotor Combine Harvester:** The world's largest in its category, featuring a 775 hp engine and a 20,000-liter grain tank.
- **CR Series Harvesters:** Six models equipped with the IntelliSense AI system for automated adjustments every 20 seconds, enhancing performance and grain quality. Manufactured in Zedelgem, Belgium.
- **SaveFarm:** An AI-driven selective spraying solution that reduces herbicide usage by over 80%. Manufactured in Brazil.
- **Application Drone:** Boasting the highest capacity in the market, designed for efficient aerial applications. Manufactured in Brazil.
- **TL5 Commemorative Tractor:** A special edition celebrating Brazilian agriculture, to be auctioned for charity. Manufactured in Brazil.

CASE IH Under its "Agronomic Intelligence" initiative, Case IH unveiled:

- **Axial-Flow AF10 Automation:** The world's largest single-rotor grain harvester with 775 hp and a 20,000-liter grain tank, featuring Automation 2.0 for autonomous operations. Manufactured in Brazil.
- **Ethanol-Powered Tractor:** A medium-power tractor aimed at reducing carbon emissions, aligning with sustainable agriculture goals. Manufactured in Brazil.

- **Patriot Series 50 Sprayers:** Equipped with AIM Command Flex II technology for precise, nozzle-by-nozzle spraying. Manufactured in Brazil.
- **SaveFarm System:** Similar to New Holland's, this AI-based system enables real-time localized spraying, significantly cutting herbicide use. Manufactured in Brazil.
- **Farmall C Tractors:** New models with 100hp and 110hp options, offering enhanced lift capacity and optional DirectSteer autopilot. Manufactured in Brazil.

FENDT Fendt introduced the Ideal 25 Combine Harvester, Manufactured in Brazil, designed for tropical agriculture. Key features include:

- **Dual Helix Processor System:** With 4.84-meter rotors and a 45% larger threshing area, it boosts separation capacity without compromising grain quality.
- **Enhanced Cleaning System:** 25% larger, offering compensation for up to 15% slope, crucial for uneven terrains in Brazil.

BALDAN It expects to start producing the Avola 3500 in 2026, with a larger clearance and capacity than the Avola 2500, continuing its growth in self-propelled sprayers in Brazil.

JOHN DEERE Series of S7 harvesters draws attention and will start to be produced in May in Brazil, in Horizontina-RS. There will be 4 models (S7 600; S7 700; S7 800 and S7 900). Key features include:

- **Predictive speed technology:** The model features two front cameras in the cab that map the terrain up to 8.5 meters ahead, combining the images with satellite data to predict crop yield and automatically adjust harvesting speed.

NEW HOLLAND New Holland proposes remodeling its sprayers and debuts the Defensor 4000. Manufactured in Brazil. Key Features include:

- **Smart Fill:** Promotes accurate monitoring of the flow of grout, making the filling process faster and more efficient.
- **IntelliSpray™ II:** Performs the control and cutting of section nozzle by nozzle, reducing waste and optimizing the application of pesticides

TRELLEBORG TIRES Marking its entry into the agricultural rubber track segment, Trelleborg unveiled:

- **ART1000 Rubber Track:** Designed for high-horsepower machinery, it offers exceptional versatility, minimizes soil compaction, and ensures durability in challenging conditions.
- **TM150 CFO Tire:** Developed for the new generation of sprayers, enhancing performance and efficiency. **PSR**

CONTACT US

Purchasing and Inquiries

Headquarters
St. Paul, USA
+1 651 905 8400
info@powersys.com

Detroit, USA
+1 734 545 0474
infode@powersys.com

Beijing, China
+86 10 5737 9201
infocn@powersys.com

Campinas, Brazil
+55 19 3305 5657
infosa@powersys.com

European Headquarters
Brussels, Belgium
+32 2 643 2828
infobr@powersys.com

Frankfurt, Germany
+49 160 1807 044
infoge@powersys.com

Pune, India
infoin@powersys.com

Tokyo, Japan
+81 90 9139 0934
infojp@powersys.com

About Power Systems Research

Power Systems Research (PSR), established in 1976, is the leading source of data, analysis and forecasting on the global production of engines and engine-powered equipment, including class 8 vehicles. One of its databases, EnginLink,™ includes production figures down to the model level for OEMs in key market segments, such as commercial vehicles. PSR's global research network includes eight offices and stretches across 200 countries and four continents.

Power Systems Research
Data · Forecasting · Solutions™