RETAIN MEDIA

Agricultural Market Brand Consideration Report Q1 2026

Market Consideration Report

METHODOLOGY AND LIMITATIONS

ABOUT THE METHODOLOGY

1. **Data Source & Intent Filtering.** This report is based on proprietary analysis of Google Search Volume data in the Australian market. To isolate **brand consideration** and buyer intent, Retain Media utilises a multi-layered filtering process. We specifically include keywords relating to brand, model, dealership, and localised searches, alongside consideration modifiers such as "reviews" or "problems." To maintain the integrity of "intent," we systematically exclude searches related to post-purchase ownership, including parts, accessories, merchandise, manuals, servicing, racing results, and rentals, as well as searches specifically for used vehicles

2. **Brand Categorisation & Data Normalisation.** To ensure a "like-for-like" comparison, our methodology distinguishes between **category-exclusive brands** (e.g., Harley-Davidson, Aprilia) and **multi-category brands** (e.g., Yamaha, Suzuki, Honda). For category-exclusive brands, total brand search volume is captured. For multi-category brands, we utilise qualified search strings (e.g., "Brand + Motorcycle" or "Brand + [Model]") to ensure the data reflects intent within the specific vehicle market only. Consequently, these figures represent a conservative, "qualified-only" view of interest for multi-category brands compared to the broader capture of exclusive brands.

3. **Limitations & Use of Data.** The findings in this report are intended as a **directional indicator of digital consumer** sentiment and "Share of Search." They are not a proxy for actual sales figures, vehicle registrations, or total market share. While Retain Media uses industry-standard tools and rigorous manual filtering to ensure accuracy, this data is provided "as is." Retain Media and its distribution partners accept no liability for commercial decisions made based on this report. Users are encouraged to use this data as one of multiple data points in their market analysis.

Top 20 Searched - Ag Brands

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Q on Q top 20 Brands by keword search volume

	Brand	2025 Q2	2025 Q3	2025 Q4	2026 Q1
1.	John Deere	17.7%	17.2%	17.4%	18.0%
2.	Massey Ferg…	14.9%	14.8%	15.0%	14.8%
3.	Kubota	8.1%	7.7%	8.7%	9.3%
4.	New Holland	6.9%	6.6%	6.7%	6.5%
5.	Claas	5.4%	5.7%	6.4%	5.3%
6.	Case IH	4.0%	4.1%	4.1%	3.8%
7.	JCB	3.5%	3.4%	3.2%	3.7%
8.	Silvan	2.4%	3.2%	3.3%	3.0%
9.	Manitou	2.8%	2.9%	2.5%	2.8%
10.	Kioti	2.4%	2.5%	2.3%	2.2%
11.	Kanga	2.2%	2.4%	2.3%	2.1%
12.	Vermeer	1.8%	1.9%	1.7%	1.9%
13.	TTI	1.7%	1.8%	1.6%	1.7%
14.	United Heavy…	1.5%	1.6%	1.5%	1.5%
15.	Fendt	1.6%	1.5%	1.5%	1.4%
16.	Deutz-Fahr	1.5%	1.5%	1.4%	1.3%
17.	Hardi	1.3%	1.5%	1.2%	1.3%
18.	Mahindra	1.2%	1.2%	1.2%	1.3%
19.	Burder	0.9%	0.9%	1.0%	0.9%
20.	Avant Equip…	0.8%	0.9%	0.7%	0.8%
	Grand total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Top Mainline Brands Searched

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Q on Q top 20 Mainline Brands by keword search volume

	Brand	2025 Q2	2025 Q3	2025 Q4	2026 Q1
1.	John Deere	24.3%	24.1%	23.8%	24.7%
2.	Massey Ferg…	20.5%	20.7%	20.5%	20.3%
3.	Kubota	11.2%	10.8%	11.9%	12.7%
4.	New Holland	9.4%	9.2%	9.1%	9.0%
5.	Claas	7.4%	7.9%	8.8%	7.3%
6.	Case IH	5.6%	5.7%	5.7%	5.2%
7.	JCB	4.8%	4.8%	4.4%	5.0%
8.	Kioti	3.3%	3.5%	3.2%	3.0%
9.	United Heavy …	2.0%	2.3%	2.1%	2.1%
10.	Fendt	2.2%	2.0%	2.1%	1.9%
11.	Deutz-Fahr	2.1%	2.1%	1.9%	1.8%
12.	Mahindra	1.7%	1.7%	1.7%	1.8%
13.	Versatile	1.1%	0.9%	0.9%	1.0%
14.	Iseki	0.8%	0.8%	0.8%	0.8%
15.	McCormick	0.8%	0.8%	0.7%	0.8%
16.	TYM tractors	0.6%	0.5%	0.5%	0.5%
17.	Leyland Tractor	0.4%	0.4%	0.4%	0.5%
18.	Valtra	0.5%	0.4%	0.4%	0.4%
19.	Kverneland	0.2%	0.3%	0.3%	0.2%
20.	Sota Tractors	0.2%	0.2%	0.2%	0.2%
	Grand total	**100.0%**	**100.…**	**100.0%**	**100.…**

Top Short Line Brands Searched

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Q on Q top 20 Short line Brands by keword search volume

	Brand	2025 Q2	2025 Q3	2025 Q4	2026 Q1
1.	Silvan	8.8%	11.2%	12.2%	11.1%
2.	Manitou	10.4%	10.1%	9.2%	10.2%
3.	Kanga	8.2%	8.4%	8.4%	7.8%
4.	Vermeer	6.7%	6.6%	6.2%	6.9%
5.	TTI	6.2%	6.2%	6.0%	6.4%
6.	Hardi	4.9%	5.1%	4.5%	4.9%
7.	Burder	3.3%	3.2%	3.6%	3.3%
8.	Avant Equipment	2.9%	3.1%	2.7%	2.9%
9.	Bourgault	3.5%	1.8%	1.4%	2.6%
10.	MacDon	2.6%	3.9%	4.6%	2.5%
11.	Goldacres	2.3%	2.4%	2.0%	2.2%
12.	Kuhn	2.3%	2.8%	3.3%	2.1%
13.	Krone	2.1%	2.5%	3.3%	2.1%
14.	John Berends I…	1.8%	1.9%	2.1%	2.1%
15.	Rapid Spray	1.5%	1.6%	1.8%	2.1%
16.	Farmtech	2.3%	2.0%	1.6%	1.9%
17.	Croplands	1.3%	1.4%	1.3%	1.3%
18.	Serafin Machin…	1.4%	1.2%	1.0%	1.3%
19.	Agco	1.4%	1.3%	1.3%	1.3%
	Grand total	**100.0%**	**100.…**	**100.…**	**100.…**

Most-Searched Farm Bikes

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Q on Q top 20 Farm Bike models by keword search volume

	Brand	Model	2025 Q2	2025 Q3	2025 Q4	2026 Q1
1.	Honda	CT125	41.2%	41.2%	42.1%	42.9%
2.	Honda	XR150L	14.1%	14.8%	16.9%	17.3%
3.	Honda	XR190CT	8.3%	8.0%	8.5%	7.8%
4.	Yamaha	AG 100	9.9%	9.3%	8.2%	7.8%
5.	Kawasaki	Stockman	7.4%	7.4%	6.0%	6.1%
6.	Yamaha	AG200F	6.5%	6.2%	5.9%	5.7%
7.	Yamaha	AG125	6.2%	4.6%	4.2%	4.4%
8.	Honda	CTX200	4.1%	5.4%	3.9%	4.4%
9.	Suzuki	Trojan 200	2.3%	3.1%	4.2%	3.8%
		Grand total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Top 20 Models Searched: ATV/UTV

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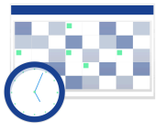
Q on Q top 20 UTV / ATV Models by keword search volume

	Brand	Model	2025 Q2	2025 Q3	2025 Q4	2026 Q1
1.	John Deere	Gator	6.8%	6.9%	6.8%	8.2%
2.	Kawasaki	Mule	3.7%	3.5%	3.2%	3.5%
3.	Polaris	Ranger	3.8%	3.8%	3.3%	3.5%
4.	Can Am	Defender	3.1%	3.1%	2.6%	2.9%
5.	Kubota	RTV	2.9%	2.8%	2.7%	2.7%
6.	Can Am	Maverick	3.0%	2.8%	3.0%	2.6%
7.	Can Am	Outlander	2.7%	2.6%	2.7%	2.5%
8.	Yamaha	YFM700 Raptor	2.5%	2.5%	2.5%	2.4%
9.	CFMOTO	UFORCE 1000	2.0%	1.9%	3.0%	2.0%
10.	CFMOTO	CFORCE	0.8%	0.8%	1.0%	2.0%
11.	Honda	Pioneer 1000	2.1%	2.0%	1.8%	2.0%
12.	Polaris	Ranger 500	0.8%	0.8%	1.8%	1.9%
13.	Kubota	RTV-X900	2.1%	2.0%	1.9%	1.8%
14.	Polaris	RZR XP 1000 Sp…	1.7%	1.7%	1.6%	1.8%
15.	Can Am	Maverick X3	1.9%	1.7%	1.9%	1.8%
16.	CFMOTO	CFORCE 1000	1.1%	1.1%	2.3%	1.8%
17.	Polaris	RZR	2.0%	2.0%	2.0%	1.7%
18.	Yamaha	YFZ450R	1.8%	1.7%	1.6%	1.7%
19.	Yamaha	Viking	1.7%	1.5%	1.5%	1.4%
20.	Polaris	Ranger 1000	1.4%	1.3%	1.3%	1.4%
		Grand total	**100.0%**	**100.0%**	**100.0%**	**100.0%**

STRATEGY

DATA & INSIGHT



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