

India Micro Irrigation Systems - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The India Micro Irrigation Systems Market size is estimated at USD 0.64 billion in 2024, and is expected to reach USD 1.08 billion by 2029, growing at a CAGR of 11.10% during the forecast period (2024-2029).

Key Highlights

- India is an agriculture-dependent country, and agriculture in India is rain-fed. So there is a potential for promoting micro irrigation in the market. Rajasthan is a state with high micro-irrigation adaptability and has a large area under micro-irrigation due to the lack of water resources in the state.
- Furthermore, Indian farmers have been increasingly encouraged to adopt micro-irrigation systems on open fields for efficient water usage and an increase in agricultural yield. The area under open field micro-irrigation is higher than greenhouses in the country. Most of the greenhouses equipped with micro-irrigation in the country are used for horticultural production, with more farmers inclining toward greenhouse cultivation owing to benefits such as year-round production.
- The drip irrigation system dominated the market in 2021, owing to higher subsidies offered by the central and state governments in various states. The maximum adoption of the drip irrigation system is witnessed for fruit crops, followed by plantation crops, in terms of area coverage. Jain Irrigation Systems Limited, Netafim, Avanijal Agri Automation Pvt. Ltd, Agsmartic Technologies Pvt. Ltd, and Flybird Farm Innovations Pvt. Ltd are the most active players in the Indian micro-irrigation systems market. These players are adopting product innovation as their most adopted strategy to have a competitive edge over other players in the market.

Indian Micro Irrigation Systems Market Trends

Increase in Greenhouse Cultivation is Driving the Market

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- In recent years, the cultivation of flowers and vegetables in greenhouses has emerged as a major alternative to overcome yield issues. As greenhouses ensure year-round production, farmers are showing greater interest in them. The greenhouses in the country are mostly equipped with micro-irrigation systems. Under the greenhouse segment, drip irrigation is the most dominant micro-irrigation system. The revenue from greenhouses also increased in the past few years. For instance, the revenue of greenhouses in 2020 was USD 20.6 million, and it increased to USD 28.5 million in 2021. The increase in the revenue from greenhouses also contributes to the growth of the market.
- Major crops cultivated under greenhouses are leafy vegetables, capsicum, flowers, and tomatoes. Central and state governments in the country are granting subsidies for the construction of greenhouses and for installing micro-irrigation systems. For instance, in the 2021 budget, the Indian government set the target of covering 100 lakh hectares in five years under micro-irrigation. Similarly, in the year 2019-20, about 11 lakh farmers benefited from the adoption of drip and sprinkler irrigation. Thus, increasing intervention of several state governments by providing subsidies, coupled with rising product innovation of major players, is anticipated to drive the market further.

Maharashtra is Dominating the Market

- Maharashtra state dominates the Indian market for micro irrigation. The state government urged the central government to allocate more funds under the Pradhan Mantri Krishi Sinchai Yojana (PMKSY) to bring at least 50% of agricultural land under micro-irrigation over the next five years. It also requested the central government to promote micro-irrigation to crops beyond high, water-intensive sugarcane and bananas under the 'More Crop Per Drop' scheme. The financial burden under micro-irrigation was shared by the central and state governments in a ratio of 60:40 for 2019-2020. For instance, the proposed expenditure for micro-irrigation in Maharashtra is INR 653.33 crore (USD 80 million), of which the Central government's share is INR 400 crore (USD 49 million) and the state's share is INR 253.33 crore (USD 31 million).
- Farmers are provided subsidies for the installation of drip irrigation sets and sprinklers in their fields. In terms of acreage, the physical achievement of the state was more under a drip irrigation system. For instance, according to the Ministry of Agriculture and Farmers Welfare, the agriculture land covered under micro-irrigation was 12,908.44 thousand ha, in which the area under drip irrigation was 6,112.05 thousand ha and sprinkler irrigation was 6,796.39 thousand ha in 2021. The sprinkler irrigation system is the most adopted irrigation technology for cultivating maize, pulses, and groundnut. Nearly half of the state's sprinkler irrigation system sales were from these crops. The growing awareness of drip irrigation systems is expected to boost the growth of the market during the forecast period.
- Along with this, the increased partnership of major players with the government is encouraging the micro-irrigation market in the state. For instance, Jain Irrigation Systems Ltd is an Indian agri-business firm offering drip and sprinkler systems, pipes and fittings, plumbing systems, tissue culture, solar products, and integrated drinking water solutions. With government support, the company has set up drip irrigation pilots for sugarcane in Maharashtra. Thus, the increased government support and innovative ideas from the key players are aiding the growth of the market.

Indian Micro Irrigation Systems Industry Overview

The Indian micro irrigation market is majorly consolidated, with top players Jain Irrigation Systems Ltd and Netafim Limited taking up the majority of the market share. Other players include Rivulus Irrigation and Premier Irrigation Adritec.

The most active players in the micro irrigation market are Jain Irrigation Systems and Netafim. They have high competition in capturing the market shares in most of the top agricultural states with high micro irrigation penetration.

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- The market estimate (ME) sheet in Excel format
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