

Irrigation Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 165 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Irrigation Machinery Market size is estimated at USD 17.52 billion in 2024, and is expected to reach USD 25.09 billion by 2029, growing at a CAGR of 7.46% during the forecast period (2024-2029).

Key Highlights

- The climatic changes and the increase in global warming have brought changes in rainfall patterns, making irrigation in agriculture difficult. Hence, the use of irrigation machinery has made it easy to serve thousands of acres around the world. The most-used modern irrigation methods are sprinkler and drip irrigation. They primarily serve to sustain crop growth and moisture.
- Crucial factors, such as government subsidies and policies, technological innovations, and increasing concern over water scarcity, are driving the market's growth. Also, the market for irrigation machinery is anticipated to grow with increased scarcity of natural irrigation systems and enhanced demand for crop productivity.
- Sprinkler irrigation machinery is the largest segment in the global irrigation machinery market. Several leading market players are investing in R&D to develop innovative products and maintain a strong market foothold. The growing usage of efficient irrigation systems for their better yield output and other associated benefits is coupled with the continuous introduction of advanced models by key market players to make it the largest segment of the market studied.
- North America is considered the fastest-growing market. The companies located in the region are launching new products, thereby dominating the studied market with faster innovations and product launches. Government policies are also supplementing the growth of the market by providing various subsidies to the farmers.

Irrigation Machinery Market Trends

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Subsidies from Governments and Support from Financial Institutions

Government organizations are promoting irrigation machinery in various countries to encourage the adoption of advanced irrigation technologies by providing multiple benefits or subsidies to farmers. These subsidies are helping farmers buy irrigation machinery to simplify the irrigation practices on the farm, thereby aiding the increased land under irrigation around the world. For instance, according to the World Data Atlas, the total irrigated area worldwide increased by 74,613 thousand hectares from 2019 to 2020. Additionally, in the United States, increasing water conservation and subsidies for drip irrigation are anticipated to enhance water consumption and crop yield. This is expected to augment the demand for drip irrigation machinery.

Along with this, Uganda is a region primarily dependent on agriculture. Still, the lack of water infrastructure and increasingly erratic rainfall due to climate change are just two of the challenges faced by its farmers. To help ease the hardships of farmers, the World Bank is supporting the Ministry of Agriculture and 40 local governments across Uganda as part of the Uganda Intergovernmental Fiscal Transfers Program for Results (UgIFT). In Sep 2020, the Board of Directors approved USD 300 million in additional financing to the UgIFT to boost local government (LGs) service delivery in education, health, water and environment, and micro irrigation, including in areas hosting large populations of refugees. This initiative helped farmers buy irrigation equipment at a lower cost, learn to use the irrigation equipment, and understand when and how to water crops.

The Indian government, under the Per Drop More Crop scheme, offers subsidies or financial assistance at a rate of 55% of the indicative unit cost to farmers and a rate of 45% to other cultivators in order to encourage farmers to install drip and sprinkler irrigation systems to promote the water use efficiency. This is expected to strengthen the market. Owing to favorable government policies regarding low-interest loans and subsidies for implementing modern and advanced irrigation systems, the irrigation machinery market is likely to witness significant growth worldwide.

North America Dominates the Market

The rate of adoption of irrigation systems in North America has increased over the past few years. Water scarcity is a significant challenge and a key driver for using irrigation machinery systems. Micro irrigation systems, such as drip and sprinklers, reduce water wastage and increase productivity.

The growing sophistication of equipment and government initiatives in the form of subsidies is driving market growth. Water development programs at the federal, state, and local levels and improvements in groundwater pumping technologies are contributing to the expansion of the irrigated area in North America. Farmers in the region have been able to avail themselves of timely subsidies in the form of agriculture equipment loans at flexible interest rates and repayment schedules. This has helped even small-scale farmers invest in agricultural irrigation equipment, thereby expanding the market of irrigation systems.

For instance, the US government extends loans on farm equipment through USDA Direct Operating Loans, USDA Operating Microloans, and USDA Guaranteed Operating Loans. The 2018 Farm Bill further increased the farm loan limit for US farmers to better access credit for high capital costs related to agriculture systems, including irrigation systems. The availability of loans and subsidies is propelling the demand for agricultural irrigation machinery, resulting in the growth of the market studied in the country.

As reported by Statistique Canada, the total irrigated area in the country in 2020 was 605,907 hectares. With 345,581 hectares, the field crops contributed to most of the irrigation, while the forage crops accounted for 205,866 hectares. The large, irrigated area in the country is driving the market for irrigation machinery subsequently in the region.

Irrigation Machinery Industry Overview

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The irrigation machinery market is consolidated, with major players occupying a significant share of the market studied. These players include Orbia (Netafim Limited), Jain Irrigation Systems Limited, The Toro Company, Vamont Industries, and Rain Bird Corporation. These key players are investing in new product launches and acquisitions for business expansions.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions & Market Definition
- 1.2 Scope Of The Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Restraints
- 4.4 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.4.1 Bargaining Power of Suppliers
 - 4.4.2 Bargaining Power of Buyers
 - 4.4.3 Threat of Substitute Products
 - 4.4.4 Threat of New Entrants
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 By Irrigation Type
 - 5.1.1 Sprinkler Irrigation
 - 5.1.1.1 Pumping Unit
 - 5.1.1.2 Tubing
 - 5.1.1.3 Couplers
 - 5.1.1.4 Spray/Sprinklers Heads
 - 5.1.1.5 Fittings and Accessories
 - 5.1.1.6 Sensors
 - 5.1.1.7 Controllers
 - 5.1.1.8 Injectors
 - 5.1.1.9 Flow Meters
 - 5.1.2 Drip Irrigation
 - 5.1.2.1 Valves
 - 5.1.2.2 Backflow Preventers
 - 5.1.2.3 Pressure Regulators
 - 5.1.2.4 Filters
 - 5.1.2.5 Emitters

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.1.2.6 Tubing
- 5.1.2.7 Other Drip Irrigations
- 5.1.3 Pivot Irrigation
- 5.1.4 Other Irrigation Types
- 5.2 By Application Type
 - 5.2.1 Grains and Cereals
 - 5.2.2 Pulses and Oilseeds
 - 5.2.3 Fruits and Vegetables
 - 5.2.4 Other Application Types
- 5.3 By Geography
 - 5.3.1 North America
 - 5.3.1.1 United States
 - 5.3.1.2 Canada
 - 5.3.1.3 Mexico
 - 5.3.1.4 Rest of North America
 - 5.3.2 Europe
 - 5.3.2.1 Germany
 - 5.3.2.2 United Kingdom
 - 5.3.2.3 France
 - 5.3.2.4 Italy
 - 5.3.2.5 Netherlands
 - 5.3.2.6 Rest of Europe
 - 5.3.3 Asia-Pacific
 - 5.3.3.1 China
 - 5.3.3.2 Japan
 - 5.3.3.3 India
 - 5.3.3.4 Saudi Arabia
 - 5.3.3.5 Cambodia
 - 5.3.3.6 Rest of Asia-Pacific
 - 5.3.4 South America
 - 5.3.4.1 Brazil
 - 5.3.4.2 Argentina
 - 5.3.4.3 Peru
 - 5.3.4.4 Rest of South America
 - 5.3.5 Middle East and Africa
 - 5.3.5.1 South Africa
 - 5.3.5.2 Rest of Middle East and Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Market Share Analysis
- 6.2 Most Adopted Strategies
- 6.3 Company Profiles
 - 6.3.1 Nelson Irrigation Corporation
 - 6.3.2 Orbia (Netafim Limited)
 - 6.3.3 EPC Industries Limited
 - 6.3.4 Jain Irrigation Systems Limited
 - 6.3.5 T-I Irrigation Co.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.3.6 The Toro Company
- 6.3.7 Valmont Industries
- 6.3.8 Deere & Company
- 6.3.9 Lindsay Corporation
- 6.3.10 Rain Bird Corporation
- 6.3.11 Rivulus Irrigation

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Irrigation Machinery - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 165 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-02
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com