

## **South America Agricultural Sprayers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029**

Market Report | 2024-02-17 | 100 pages | Mordor Intelligence

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### **Report description:**

The South America Agricultural Sprayers Market size is estimated at USD 501.09 million in 2024, and is expected to reach USD 667.11 million by 2029, growing at a CAGR of 5.89% during the forecast period (2024-2029).

#### Key Highlights

- Plant protection activities are the most important practices during crop production and the application of maximum pesticide products with the sprayer. Conventional agricultural spraying techniques have made the inconsistency between economic growth and environmental protection in agricultural production. Spraying techniques continuously developed in recent decades. Robotics and automatic spraying technologies like variable rate sprayers, UAV sprayers, and electrostatic sprayers are growing to Increase the utilization rate of pesticides, reduce pesticide residues, real-time, cost-saving, and high compatibility of plant protection products applications. These technologies are under the 'umbrella' of precision agriculture. These advanced spraying technologies not only reduce labor costs but are also effective in environmental protection which will boost the market in the coming years.
- Some of the major players are also involved in the manufacturing of innovative sprayers based on the current situation and the customer demand to reduce the increasing labor costs and finding skilled labor to operate equipment. In 2022, John Deere Teams with Driverless Agricultural Sprayer manufacturer GUSS Automation LLC to collaborate on sprayer sales and facilitate further product development with AI and IoT to help the four-wheeled sprayers complete the tedious, time-consuming and hazardous task of spraying chemicals and other agents on high-value crops in orchards and vineyards.
- Factors which are driving the market are the increase in average farm size leading to the adoption of sprayers, and technological advancements in terms of new innovative sprayers that cater to the needs of South American farmers are some of the factors driving the market growth for sprayers.

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### Increase in Average Farm Size Leading To Adoption of Agricultural Sprayers

In South American countries, agriculture has traditionally been represented by small and medium family farms operating their own land and capital. However, in recent decades, a trend toward farm consolidation and the rise of large corporate farming structures has been observed in countries such as Argentina and Brazil which will lead to prefer farm automation equipment to overcome the labor cost and time-saving process. These factors are encouraging the region to increase the farm size in order to gain the profits by using advanced equipments in the agri-sectors and this will boost the market to grow in the coming years.

In Argentina, Privatization, convertibility law, the launch of the loan market, and reduction of state intervention in agricultural markets created a favorable environment for the development of national agriculture and stimulated cooperation activities among farmers, land owners, input and service suppliers, processors, etc.

According to the World Bank database, the land under agricultural production increased significantly with 43.5% of the total agricultural area in Colombia followed by Argentina, whereas Brazil showed stable growth over the last few years. Government programs such as Plan Colombia Siembra supporting funds for technical assistance, infrastructure, and farm machinery modernization have promoted an increase of sprayer sales in the region. The increasing penetration rate for advanced farming equipment is driving the sales of sprayers in the region.

### Technological Advancements in Sprayers

The need for sustainability in agrochemical management has led to the demand for highly developed mechanical sprayers in recent years. Major demand in the region has arisen from self-propelled sprayers equipped with high-tech tools, such as automatic section control, data transmission, and direct injection, which further ensure the accurate spread of agricultural chemicals.

In 2021, John Deere offers an all-new lineup of Hagie Self-Propelled Sprayers for the model year 2022 to help farmers manage tight operating windows and challenging field conditions at various crop stages. Three models are being offered and including the STS12, STS16, and STS20 which reduces the need for operators to constantly turn and look behind the machine during application. The company is investing billions in self-driving tractors and smart crop sprayers to extend its dominance to software to make those machines and agriculture more efficient and productive. This will drive the market of sprayers in the coming years.

Technological innovations are also profoundly transforming spraying techniques and the use of technology makes the application of agrochemicals happen only where it is needed. This makes the spraying process more accurate, providing savings on inputs and higher plantation yield. Example, in 2021, Jacto opens new factory in the Brazil and new facility will have approximately 1.03 million square feet.

A smart spraying technology is a cutting-edge substitution to a conventional sprayer that automatically disperses chemicals on the crops following a set of regulations ensuring the process is efficient and sustainable which can able to reduce the spray loss, pesticide, and airborne spray drift more than 50% and are only improving with technological advances and the rise of connected farming. This technologies will make the market to grow during the forecasting period.

### South America Agricultural Sprayers Industry Overview

The South America Agriculture Sprayers Market is fragmented with few players holding a major share of the market. Jacto Inc, CNH Industrial N.V., Stara SA, AGCO Corporation, and Deere & Company are some of the major players who are operating in the region. The South America Agriculture Sprayers companies are not only competing on the basis of product quality or product

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promotion but are also focused on other strategic moves, like acquisitions and expansions, in order to acquire a larger share and expand their acquired market size.

Additional Benefits:

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

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