

Digital Soil Mapping Platforms and Applications Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Agriculture Cooperatives, Government and Research Institutes, Agribusiness Companies, Others), By Product Type (Drone Scouting, Mobile Scouting, Satellite Imagery, Others), By Region and Competition, 2019-2029F

Market Report | 2024-09-06 | 183 pages | TechSci Research

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Report description:

Global Digital Soil Mapping Platforms and Applications Market was valued at USD 0.24 Billion in 2023 and is expected to reach USD 0.46 Billion by 2029 with a CAGR of 11.76% during the forecast period. The Global Digital Soil Mapping Platforms and Applications Market is witnessing significant growth driven by increasing agricultural demands and the need for sustainable soil management practices. Digital soil mapping (DSM) utilizes advanced technologies such as remote sensing, GIS, and machine learning to create detailed, high-resolution soil property maps. These platforms provide critical data for optimizing crop yields, managing soil health, and implementing precision agriculture techniques. The market is expanding as agricultural professionals and researchers seek more precise and accessible soil data to support decision-making processes. According to a 2022 report by the Food and Agriculture Organization (FAO), the United Nations has classified soil as a finite resource, forecasting severe soil depletion within the next 60 years. Globally, soil degradation is projected to result in a \$23 billion economic impact by 2050, due to the anticipated losses in food production, ecosystem services, and income.

Key applications of DSM include soil fertility management, land use planning, and environmental monitoring. These platforms help in identifying soil characteristics such as texture, organic matter content, and nutrient levels, which are essential for effective crop management and conservation practices. The integration of DSM with precision agriculture technologies allows for more targeted application of fertilizers and pesticides, reducing waste and environmental impact.

The market's growth is further supported by technological advancements in data collection and processing, as well as the increasing adoption of precision agriculture. Government initiatives and funding for sustainable agricultural practices and research

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are also contributing to the market's expansion. In 2023, the Food and Agriculture Organization estimated that up to 34% of greenhouse gas emissions from agricultural land could be mitigated through sustainable soil management practices and more efficient fertilizer use. Major players in the industry are focusing on developing innovative DSM solutions and expanding their geographic reach to cater to the growing demand from various regions.

Key Market Drivers

Growing Adoption of Precision Agriculture

The growing adoption of precision agriculture is profoundly influencing the Global Digital Soil Mapping Platforms and Applications Market. Precision agriculture utilizes sophisticated technologies to gather and analyze detailed soil information, thereby enabling farmers to refine their farming practices and enhance crop productivity. Central to this approach is digital soil mapping, which provides precise data on soil properties, including nutrient levels, moisture content, and texture. This data allows for more accurate and targeted decision-making regarding the application of fertilizers, irrigation, and pest management. The Annual Soils Refresh (ASR) introduces new soils data, updates existing information, and adds new soil interpretations, ensuring consistency with official standards. As of October 1, 2023, the official soil survey database has been updated and is accessible to the public via Web Soil Survey (WSS) and Soil Data Access (SDA). Key updates include the addition of 56 million acres of new soils data, the publication of 3,377 soil survey areas, refreshed tabular data for all survey areas, spatial data updates for 700 survey areas, the publication of 117 national soils interpretations, and the introduction of 36,000 new soil polygons, 2,000 new map units, and 16,000 new soil components.

By leveraging digital soil mapping, farmers can customize their inputs to match the specific conditions of different soil areas, leading to significant reductions in resource wastage. For instance, precision agriculture helps in optimizing fertilizer use by ensuring that nutrients are applied only where and when they are needed, thus preventing overuse and minimizing runoff. Similarly, tailored irrigation practices reduce water wastage and enhance the effectiveness of water usage, which is crucial in areas experiencing water scarcity. The focus on improving agricultural productivity while also mitigating environmental impact is driving the widespread adoption of precision agriculture. With increasing concerns over sustainability and resource management, farmers and agronomists are increasingly turning to data-driven solutions to achieve these goals. Digital soil mapping technologies provide a way to meet these needs by offering detailed insights that support more efficient and environmentally friendly farming practices.

As technological advancements continue to evolve, the capabilities of digital soil mapping platforms are expanding. These advancements enhance the accuracy of soil data and provide more actionable insights, further driving the adoption of these technologies. The growing emphasis on leveraging big data and analytics in agriculture is also contributing to the rising demand for sophisticated soil mapping solutions.

Advancements in Remote Sensing Technologies

Advancements in remote sensing technologies are significantly propelling the growth of the Global Digital Soil Mapping Platforms and Applications Market. The emergence of high-resolution satellite imagery, drones, and airborne sensors has revolutionized the way soil data is collected, offering enhanced precision and coverage over extensive areas. These cutting-edge technologies provide the capability to measure and analyze various soil attributes, including moisture content, texture, and nutrient levels, with remarkable accuracy. High-resolution satellite imagery allows for detailed monitoring of soil conditions from space, while drones offer the advantage of capturing high-resolution images from a closer perspective. Airborne sensors complement these technologies by providing additional data layers, such as thermal and multispectral information, which are crucial for understanding soil variability and health. The combination of these technologies ensures a comprehensive and precise assessment of soil properties.

The integration of remote sensing data with Geographic Information Systems (GIS) and machine learning algorithms has further enhanced the capabilities of digital soil mapping. GIS enables the spatial analysis and visualization of soil data, while machine learning algorithms analyze complex datasets to generate highly accurate soil property maps. These advancements facilitate more effective soil management and precision agriculture practices, which are essential for optimizing crop yields and promoting sustainable land use. Continuous innovation in sensor technology and data processing methods contributes to the ongoing evolution of remote sensing capabilities. As sensors become more advanced and data processing techniques become more sophisticated, the quality and detail of soil information improve, meeting the increasing demand for precise soil insights across

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various sectors, including agriculture, forestry, and environmental management.

The synergy between remote sensing technologies and digital soil mapping platforms is driving the market forward by providing more detailed and actionable soil data. This technological progress supports enhanced decision-making processes and contributes to more efficient and sustainable agricultural practices, further fueling the expansion of the digital soil mapping market.

Rising Awareness of Soil Health and Its Impact on Crop Yields

Rising awareness of soil health and its critical role in crop yields is a significant driver of the Global Digital Soil Mapping Platforms and Applications Market. Soil health has gained prominence as a vital element in optimizing agricultural productivity and ensuring sustainability. This growing recognition stems from an understanding that soil properties—such as nutrient availability, pH levels, and organic matter content—have a profound impact on crop growth and yield. Farmers and agricultural researchers are increasingly acknowledging that healthy soil is foundational to successful farming. Soil health influences plant development, nutrient uptake, and overall crop performance. For instance, adequate levels of essential nutrients and balanced pH contribute to robust plant growth, while high organic matter improves soil structure and moisture retention. Recognizing these connections, there is a heightened focus on monitoring and managing soil health to achieve optimal crop yields and maintain agricultural productivity.

Digital soil mapping plays a crucial role in this context by providing detailed and actionable insights into various soil attributes. Advanced soil mapping technologies allow for precise measurement and analysis of soil properties, enabling farmers to make informed decisions about soil management. This includes optimizing fertilizer application, adjusting pH levels, and enhancing soil organic content. With accurate soil data, farmers can implement targeted interventions that address specific soil needs, leading to improved crop performance and resource efficiency.

The growing emphasis on soil health is driven by the need to ensure food security and build agricultural resilience in the face of environmental challenges. As stakeholders recognize the importance of soil health in sustaining agricultural systems, the demand for advanced digital soil mapping platforms continues to rise. These technologies offer the precision and depth of information necessary to enhance soil management practices and boost crop yields, contributing to the ongoing expansion of the digital soil mapping market.

Key Market Challenges

High Costs of Implementation and Technology Adoption

The Global Digital Soil Mapping Platforms and Applications Market faces significant challenges related to the high costs of implementation and technology adoption. Developing and deploying advanced soil mapping platforms requires substantial financial investments, especially in acquiring sophisticated equipment, software, and data processing tools. High-resolution satellite imagery, drones, and sensor technologies, integral to digital soil mapping, come with a hefty price tag, making it difficult for small and medium-sized agricultural enterprises to adopt these solutions. The integration of machine learning and AI-driven algorithms to analyze complex soil data demands substantial investments in both hardware and software infrastructure. The need for skilled professionals to manage and operate these technologies also adds to the overall cost burden. As a result, many potential users, particularly in developing regions, are deterred from investing in these platforms, limiting market penetration. The financial barriers associated with digital soil mapping technologies present a significant challenge to the market's growth, as cost-effective solutions are needed to encourage broader adoption across diverse agricultural landscapes.

Limited Access to Accurate Soil Data in Developing Regions

One of the critical challenges in the Global Digital Soil Mapping Platforms and Applications Market is the limited access to accurate soil data in developing regions. Many regions, especially in Africa, Southeast Asia, and parts of South America, lack comprehensive soil databases due to inadequate infrastructure, insufficient research, and lack of investment in soil data collection. Without reliable soil data, the effectiveness of digital soil mapping platforms is significantly compromised, as the algorithms and models rely on accurate and detailed information to produce actionable insights. The absence of robust soil data hampers the calibration of remote sensing technologies and machine learning models, leading to suboptimal results. This challenge is further exacerbated by the fact that many developing countries prioritize immediate agricultural productivity over long-term investments in soil health and data collection, creating a vicious cycle of underinvestment in soil mapping technologies. To overcome this challenge, international collaboration, government intervention, and investment in local research capabilities are necessary to build comprehensive soil databases in these regions. Without addressing this issue, the potential of digital soil

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mapping platforms will remain untapped in many parts of the world, limiting the overall market growth.

Key Market Trends

Technological Integration with Machine Learning and AI

Technological integration with machine learning (ML) and artificial intelligence (AI) is a pivotal driver of the Global Digital Soil Mapping Platforms and Applications Market. The incorporation of these advanced technologies into soil mapping significantly enhances the analysis and interpretation of complex data sets, leading to more accurate and actionable insights. Machine learning algorithms and AI are revolutionizing soil mapping by processing vast amounts of data to uncover patterns and correlations that traditional methods might miss. These technologies enable the development of predictive models that forecast soil properties and behaviors with greater precision. For instance, ML algorithms can analyze historical soil data along with current inputs to predict future soil conditions, which helps in making informed decisions about soil management and crop planning.

AI-driven soil mapping platforms offer sophisticated capabilities, such as automated data processing and real-time analysis. These platforms utilize neural networks and deep learning techniques to improve the accuracy of soil maps by learning from diverse data sources, including satellite imagery, sensor readings, and historical soil data. The ability of AI to integrate and interpret these varied data streams results in more reliable and detailed soil property maps.

The benefits of integrating AI and ML into soil mapping extend to optimizing agricultural practices and resource management. By providing precise recommendations for soil management, these technologies enable farmers to implement targeted interventions, such as adjusting fertilizer applications and managing irrigation more effectively. This leads to improved crop yields, reduced resource wastage, and enhanced sustainability in agriculture. Ongoing advancements in AI and ML technologies continue to drive market growth by offering increasingly sophisticated and efficient solutions for soil mapping and analysis. As these technologies evolve, they provide new tools and capabilities for addressing complex soil management challenges, supporting the expansion of the digital soil mapping market and fostering innovations in precision agriculture.

Expansion of Agricultural Land and Urban Development

The expansion of agricultural land and urban development is significantly influencing the Global Digital Soil Mapping Platforms and Applications Market. As agricultural activities extend into previously undeveloped areas and urbanization accelerates, the need for comprehensive and precise soil information becomes increasingly critical for effective land management and planning. Digital soil mapping offers essential data that aids in evaluating soil suitability for various uses. This information is crucial when assessing new areas for agricultural expansion or urban development. By providing detailed insights into soil properties such as nutrient levels, texture, and drainage capacity, digital soil mapping enables stakeholders to make well-informed decisions regarding land use. For instance, it helps identify areas that are best suited for cultivation and those that may pose risks, such as high erosion potential or low fertility.

As agricultural and urban projects move into new regions, understanding soil characteristics becomes vital to managing the environmental impacts of land conversion. Digital soil mapping can pinpoint areas where soil may be at risk of degradation or contamination, allowing for the implementation of mitigation measures to preserve soil health. This helps ensure that both agricultural expansion and urban development are carried out in a way that minimizes ecological disruption and promotes sustainability.

Urban development often involves significant changes to land use, such as construction and infrastructure projects. Accurate soil data supports effective planning and construction by identifying soil stability issues and informing site preparation processes. This helps prevent problems such as foundation failures and ensures that development projects are conducted safely and efficiently. The increasing emphasis on balancing agricultural growth with responsible land use and urban development practices drives the demand for advanced soil mapping technologies. As stakeholders seek to harmonize expansion efforts with environmental considerations, the Global Digital Soil Mapping Platforms and Applications Market continues to grow, driven by the need for detailed soil information to support sustainable land management practices.

Segmental Insights

Application Insights

Based on the Application In 2023, Agribusiness Companies emerged as the dominant segment in the Global Digital Soil Mapping Platforms and Applications Market. This prominence is attributed to several key factors driving their extensive adoption of digital soil mapping technologies. Agribusiness companies are major stakeholders in the agricultural sector, with substantial investments

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in optimizing crop production and enhancing operational efficiency. Their need for precise soil data to make informed decisions regarding crop management, nutrient application, and yield prediction has driven the demand for advanced digital soil mapping solutions. By integrating detailed soil information into their practices, agribusinesses can tailor their strategies to specific soil conditions, leading to improved crop productivity and resource utilization.

Agribusinesses often operate on a large scale, managing multiple agricultural sites that benefit from comprehensive soil data. Digital soil mapping platforms enable these companies to standardize and optimize soil management practices across diverse locations, enhancing overall farm performance and consistency.

Product Type Insights

Based on the Product Type segment, In 2023, Satellite Imagery emerged as the dominant segment in the Global Digital Soil Mapping Platforms and Applications Market. This dominance is primarily due to its ability to provide extensive, high-resolution data across large geographic areas, making it an invaluable tool for comprehensive soil analysis and management. Satellite imagery offers several advantages that contribute to its leading position in the market. Firstly, it enables the monitoring of vast agricultural regions and diverse soil conditions from a single platform, offering a broad overview that is essential for large-scale farming operations and regional soil assessments. This extensive coverage allows for the integration of temporal data, which helps in tracking changes in soil health and land use over time.

Advancements in satellite technology have significantly enhanced the resolution and accuracy of imagery. Modern satellites can capture detailed data on soil properties, vegetation health, and moisture levels, which are crucial for precise soil mapping and decision-making. The ability to integrate this data with Geographic Information Systems (GIS) further enhances its utility for creating detailed soil property maps.

Regional Insights

In 2023, North America emerged as the dominant region in the Global Digital Soil Mapping Platforms and Applications Market, holding the largest market share. This prominence is primarily due to several key factors driving the region's extensive adoption of digital soil mapping technologies. North America benefits from a highly developed agricultural sector with significant investments in advanced technologies. The United States and Canada have been at the forefront of adopting precision agriculture practices, which rely heavily on digital soil mapping for optimizing crop production, managing resources efficiently, and enhancing soil health. The presence of major agribusinesses and a focus on technological innovation contribute to the high demand for sophisticated soil mapping solutions.

The region's robust research and development infrastructure supports the advancement and implementation of digital soil mapping technologies. Numerous research institutions, universities, and agricultural agencies in North America actively engage in soil science research and the development of new technologies, driving market growth. The collaboration between academic institutions and industry players fosters innovation and accelerates the adoption of digital soil mapping platforms.

Key Market Players

- SoilOptix Inc
- Veris Technologies, Inc.
- Crop Nutrition Laboratory Services Ltd
- SmartCloudFarming
- Esri
- Trimble Inc.
- CropX Technologies Ltd.
- AgEagle Aerial Systems Inc.,
- Taranis
- GroundTruth Ag Inc.

Report Scope:

In this report, the Global Digital Soil Mapping Platforms and Applications Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

- Digital Soil Mapping Platforms and Applications Market, By Application:

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- o Agriculture Cooperatives
- o Government and Research Institutes
- o Agribusiness Companies
- o Others
- Digital Soil Mapping Platforms and Applications Market, By Product Type:
 - o Drone Scouting
 - o Mobile Scouting
 - o Satellite Imagery
 - o Others
- Digital Soil Mapping Platforms and Applications Market, By Region:
 - o North America
 - United States
 - Canada
 - Mexico
 - o Europe
 - France
 - United Kingdom
 - Italy
 - Germany
 - Spain
 - o Asia-Pacific
 - China
 - India
 - Japan
 - Australia
 - South Korea
 - o South America
 - Brazil
 - Argentina
 - Colombia
 - o Middle East & Africa
 - South Africa
 - Saudi Arabia
 - UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Digital Soil Mapping Platforms and Applications Market.

Available Customizations:

Global Digital Soil Mapping Platforms and Applications market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

- Detailed analysis and profiling of additional market players (up to five).

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