

## **Precision Irrigation - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Precision Irrigation Market size is estimated at USD 5.36 billion in 2025, and is expected to reach USD 8.06 billion by 2030, at a CAGR of 8.5% during the forecast period (2025-2030).

#### Key Highlights

- Water scarcity poses a significant challenge, driving the long-term adoption of precision irrigation systems. As consumer demand grows, the need for artificial irrigation has surged to secure high crop yields. Additionally, the consolidation of farmlands globally enables farmers to invest in costly systems like precision irrigation, further propelling the market.
- Technological developments are further catalyzing the expansion of the market across various regions. For example, in 2020, Nelson Irrigation Corporation introduced the R55VT and R75 End of Pivot Sprinklers, which can be easily attached to any center pivot system, excluding the impact pivot sprinklers. As technology is made affordable and efficient, the adoption rate of precision irrigation machinery is anticipated to increase. This is expected to increase the growth of the market during the forecast period. However, precision irrigation systems such as drip and sprinkler systems come with technical complexities, and the steep installation costs of these systems are hindering their widespread adoption.
- Moreover, due to favorable government policies regarding low-interest loans and subsidies for implementing modern and advanced precision irrigation systems, the precision irrigation market is likely to increase quickly in developing markets such as South America and Asia-Pacific in the coming years. Increasing awareness and high adaptability of new technologies in Asia-Pacific are driving market growth at a rapid pace.

#### Precision Irrigation Market Trends

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## Rapid Growth of Greenhouse Vegetable Production

Automatic drip irrigation is crucial in managing soil moisture, particularly for specialized greenhouse vegetables. By fully automating these systems, growers can precisely control soil moisture and water application. Moreover, such automation is anticipated to boost profits per yield.

Water scarcity poses significant challenges for vegetable farmers across various European nations. As a result, precision irrigation systems are rapidly gaining traction in the region. In 2021, the Association of Belgian Horticultural Auctions reported that Belgium's greenhouse vegetable production reached 405.4 thousand metric tons, with tomatoes accounting for 304.1 thousand metric tons. Additionally, bolstered by favorable climatic conditions and rising demand for enhanced crop yields and returns on investment, Sweden's greenhouse tomato production surged by 17.9% from 2020 to 2021.

Soilless cultivation is primarily used for greenhouse vegetable production in the United States, Canada, Japan, India, the Middle East, and Europe. As greenhouse vegetables require ample amounts of water, farmers are switching to sprinkler and drip irrigation systems to achieve higher crop productivity, and technological innovation by the market players in the future motivates the adoption. For instance, in August 2023, Netafim encouraged drip irrigation systems to be provided through four Better Life Farming (BLF) Centers in Shivpuri under protected cultivation for tomatoes on 1,600 hectares of land.

## North America Dominates the Market

Precision irrigation systems find their primary hub in North America, with the United States leading the charge, commanding over half of the region's market share. Federal, state, and local water development initiatives and advancements in groundwater pumping technologies have significantly broadened the US irrigated landscape. In 2023, research conducted by the Texas A&M AgriLife Research and Extension Center, Amarillo, United States, stated that the evaluation and usage of Surface Drip Irrigation Systems escalated the water-use efficiency in high-value vegetable production in the semi-arid, windy region of the Texas high plains. It could be challenging for tomatoes in open-field conditions to achieve an economically viable crop, even when using a surface drip irrigation system, due to the potential for extreme losses to both biotic and abiotic stressors.

The Bajio region of Mexico is a leading producer of barley, a crop known for its substantial groundwater consumption. As groundwater levels in the region dwindle, there is an urgent call for innovative water-saving technologies. A 2021 study highlighted that a blend of drip irrigation and conservation agriculture could slash water usage in barley farming by as much as 40%. This finding is set to champion the broader adoption of precision irrigation in the region's barley farming. In 2021, the Aguascalientes Water Fund, a division of Veolia Water Technologies, collaborated with The Nature Conservancy and the local municipality. Their joint effort aimed to assist vulnerable farmers in Aguascalientes, encouraging them to invest in drip irrigation equipment, thereby bolstering farm resilience and potentially increasing the uptake of these systems.

Moreover, Canadian farmers, known for their expertise, are quick to adopt new technologies, leading to anticipated high growth rates in the region. According to Statistics Canada, Canadian farmers increased their water usage for crop irrigation by 23% in 2022 compared to 2020, which is majorly attributed to the drier climatic conditions in various regions throughout the country. In recent years, there has been a notable surge in the prevalence of drip irrigation on Canadian farms. According to Canadian statistics, in 2022, the number of farms adopting drip irrigation increased by 33.2% compared to 2020. Therefore, unpredictable climatic conditions and the growing adoption of innovative water-saving techniques may increase the use of precision irrigation in North American agricultural production during the forecast period.

## Precision Irrigation Industry Overview

The precision irrigation market is consolidated with major companies such as Orbia (Netafim Limited), Jain Irrigation Systems

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Limited, The Toro Company, and Valmont. Orbia (Netafim Limited) held the highest market share, followed by Jain Irrigation Systems Limited. Establishing a strong distribution network is a prime strategy well-established market players follow. Moreover, some companies have signed definitive dealership agreements with a wide range of dealers to enhance accessibility.

Additional Benefits:

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

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