

Sprayer Market - Global Outlook and Forecast 2020-2025

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Abstracts

In-depth Analysis and Data-driven Insights on the Impact of COVID-19 Included in this Global Sprayer Market Report

The global sprayer market by revenue is expected to grow at a CAGR of 4.6% during the period 2020–2025.

The global sprayer market has been experiencing a slew of advancements. Intelligent spraying technologies have made significant strides in the last decade as more powerful and robust sensing technologies have become readily available. Variable spray technology is widely used in crop farming, animal husbandry, horticulture, and forestry. Developed countries attach high importance to the research and development of variable execution machinery. The investment is high, and a more mature map-based and real-time sensing technology-based variable pesticide spray application system is formed. Currently, global consensus has emerged on the prospect and potential of variable-injection sprays in increasing the utilization of pesticides, reducing pesticide residues, and decreasing environmental risks. Variable sprays can be adjusted in real-time based on changes in influencing factors. Hence, advanced devices and precision agriculture and robotic systems allow businesses to be more profitable, efficient, safer, and environmentally friendly.

The following factors are likely to contribute to the growth of the sprayer market during the forecast period:

Growth in High-capacity Agriculture Market

Growth in the Landscaping Industry

Increased Demand for Golf Courses

The study considers the present scenario of the sprayer market and its market dynamics for the period 2019-2025. It covers a detailed overview of several market growth enablers, restraints, and trends. The report offers both the demand and supply aspects of the market. It profiles and examines leading companies and other prominent ones operating in the market.

Global Sprayer Market Segmentation

The global sprayer market research report includes a detailed segmentation by product, application, fuel type, distribution channel, geography. The expansion of the agriculture industry is expected to be a major factor for the growth of self-propelled sprayers across the globe. They offer top-end technology with excellent maneuverability and weight distribution. However, they are expensive, have high maintenance costs, which affect the market growth. Changes in landscaping services due to legislation, technological advances, consumer behavior, and culture are increasing the adoption of mounted sprayers.

Field sprayers can efficiently distribute fertilizer and pesticides over agricultural fields. The Netherlands is primarily driving the market in Europe as it is one of the major vegetable producers. Overall, the market in Europe is driven by the need for better crop yield, which requires the use of agricultural sprayers. Enhancing productivity of orchards is one of the major factors responsible for the wide application of orchard sprayers. Moreover, the demand from emerging economies such as China, India, and Brazil and the high level of government support are fueling the growth of the horticulture industry, which is indirectly influencing the usage of orchard sprayers. Hence, with the increase in the farming sector, especially horticulture activities, farmers are focusing on high yields, which are influencing the adoption of sprayers.

Gas-powered sprayers are in demand and are proving to be an excellent choice for challenging tasks. They are extremely cost-effective for end-users and offer higher reliability than battery-run counterparts. However, they require regular maintenance to keep up their performance and improve durability. Also, they are noisier than other types, which is likely to impact their market adoption. Stringency in environmental regulations could also impact the revenue share of gas-powered machines.

The distribution environment for sprayers is rapidly evolving, with systems and processes upgrading at a rapid pace. Changes are spurred by expanding competition, constant disintermediation, and consumerization of expectations. With the sprayers market being highly time-sensitive, distributors are increasingly focusing on extending their reach to improve the speed to market maintenance parts and services. Sprayers are also available to end-users through online OEMs' e-commerce portals and online direct-to-consumer stores. Peer-to-peer rentals are gaining in popularity. Bundling additional services such as service contracts and extended warranties can help spur growth and improve margins as these equipment are complex and providing convenience in one package can increase overall satisfaction. Sprayers are sold largely through dealership websites and online retailers. A lot of offline distributors are moving the sale process online by incorporating e-commerce solutions and enterprise resource planning systems. However, online distribution has its drawbacks in terms of customer services, transparency, and trustworthiness.

Product

Mounted

Trailed

Self-Propelled

Handheld

Application

Field Sprayers

Orchard Sprayers

Gardening Sprayers

Fuel Type

Manual

Electric

Solar

Gas-powered

By Distribution Channel

Online

Retail Channel

Specialty Stores

Mass Market Players

Distributors and Dealers

INSIGHTS BY GEOGRAPHY

In recent years, the agricultural income in the EU has shown general improvement, mainly due to technological progress, leading to an increase in productivity. Agriculture in Europe produces a range of food, feed, and residual biomass products and provides other important functions, such as managing landscapes, rural development, and tourism. The region's population is growing, however, farmlands are diminishing, pushing farmers to increase their yield. New farming practices are adopted by farmers to increase crop yield. Vendors are introducing new product variants of sprayers with better spraying efficiency and high battery backup. These products are technologically more advanced than their predecessors. The presence of several large and small-scale companies in the landscaping industry for construction and the design of landscaping maintenance equipment will offer strong revenue opportunities for players in the region.

By Geography

North America

US

Canada

Europe

UK

Germany

France

Italy

Spain

Belgium

Sweden

Netherlands

Switzerland

APAC

China

Japan

South Korea

Australia

Latin America

Brazil

Mexico

Argentina

Middle East & Africa

Saudi Arabia

South Africa

UAE

INSIGHTS BY VENDORS

AGCO, CNH Industrial, Deere & Company, Exel Industries, Kubota, MTD Products, Robert Bosch, and The Toro Company are the major vendors operating in the global sprayers market. Major vendors are introducing new cost-cutting and operating efficiency measures through various initiatives such as maintaining direct material cost-out operations, right-sizing the supply chain footprint, reducing indirect material and logistics costs, and increasing revenue and operating spending performance. Also, the growing trend for efficient utilization of capital resources is likely to gain significance. Key competitive factors include reliability and quality, product innovation, product support, pricing, warranty, distribution, financing options, and shelf space.

Prominent Vendors

AGCO

CNH Industrial

Deere & Company

Exel Industries

Kubota

MTD Products

Robert Bosch

The Toro Company

Other Prominent Vendors

AL-KO Gardentech

Alamo Group

Ariens Company

Bad Boy

Black + Decker

Bobcat Company

Briggs & Stratton Corporation

Cobra Garden Machinery

Carraro

Excel Industries

Generac

Hustler Turf Equipment

The Hyundai Motor Group

Makita Corporation

Moridge Manufacturing

Metalcraft of Mayville

R&R Products

STIHL

The SUMEC Corp (Yard Force)

Swisher

Textron Incorporated

Venture Products

Volta

Walker Manufacturing

Yamabiko

ZIPPER Maschinen

KEY QUESTIONS ANSWERED

1. What is the market size and growth rate of the sprayer market during the period 2020–2025?
2. Which region is likely to account for the largest share in the global sprayers market?
3. Which government regulations could challenge the status of key regional companies?
4. Who are the major players in the market? What major business strategies they have adopted to increase revenue shares?
5. What are the key market trends impacting the growth of the agriculture sprayer market?

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