

# **Guidance and Steering System for Precision Agriculture Market - A Global and Regional Analysis: Focus on Application, Type, and Country - Analysis and Forecast, 2024-2033**

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## **Abstracts**

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This report will be delivered in 7-10 working days. Global Guidance and Steering System for Precision Agriculture Market Overview

The global guidance and steering system for precision agriculture market is projected to reach \$5,685.1 million by 2033 from \$2,307.5 million in 2023, growing at a CAGR of 9.51% during the forecast period 2024-2033. The global guidance and steering system for precision agriculture market is poised for significant growth, driven by the increasing demand for enhanced farm productivity coupled with the rising adoption of modern agricultural techniques. These systems are pivotal in ensuring precise planting, fertilizing, and harvesting, significantly reducing resource waste and optimizing crop yields. Technological advancements, such as GPS and IoT, are further enhancing the effectiveness of these systems, making them more accessible and appealing to farmers worldwide. The integration of AI and machine learning algorithms has enabled real-time field data analysis, leading to smarter, data-driven farming decisions. This digital transformation in agriculture not only boosts efficiency but also contributes to sustainability by minimizing the use of water, fertilizers, and pesticides. The market's trajectory suggests a continuing upward trend, with predictions of further refinement and innovation in these technologies. This evolution will likely foster more personalized and scalable solutions, catering to diverse agricultural needs and environments, ultimately making precision agriculture a cornerstone of modern farming practices.

## Introduction to Guidance and Steering System for Precision Agriculture

Precision agriculture represents a transformative approach in modern farming, where efficiency and precision lead to better crop management and environmental sustainability. At the heart of this revolution lies the integration of guidance and steering technologies, which enable farmers to meticulously control farm machinery, reducing overlaps and missed spots that can lead to wasted inputs and uneven crop growth. Utilizing GPS and advanced sensors, these systems ensure that seeding, fertilizing, and harvesting are executed with exacting precision. This not only optimizes the agricultural outputs but also minimizes the environmental footprint by reducing excess chemical usage and soil compaction. As a result, guidance and steering systems are crucial for maximizing both yield and resource efficiency in the pursuit of sustainable and profitable farming practices.

### Market Introduction

The precision agriculture market, particularly in the domain of guidance and steering systems, is experiencing significant growth, driven by the need for enhanced farm productivity and resource efficiency. These systems leverage advanced technologies such as GPS and IoT to enable precise field navigation, reducing overlaps and gaps during planting, fertilizing, and spraying. This optimization leads to substantial savings in time and input costs while minimizing environmental impact. The market is expected to grow in the next five years, indicating robust industry expansion and investment opportunities. As regulatory frameworks continue to evolve and emphasize sustainable practices, the adoption of guidance and steering solutions in precision agriculture is set to increase, promising a new era of farming that is both efficient and environmentally conscious.

### Industrial Impact

The industrial impact of guidance and steering system for precision agriculture market is profound, reshaping traditional farming methods toward more efficient and sustainable practices. These systems significantly enhance the accuracy of agricultural equipment, allowing for precise planting, fertilizing, and harvesting, which leads to reduced input costs and minimal environmental disruption. As farms adopt these technologies, there is a notable increase in crop yield and quality, directly correlating with heightened economic returns. This technological adoption is further supported by an ecosystem of regulatory incentives and technological advancements, fostering robust growth in the precision agriculture sector. As a result, the market not only contributes to the economic

vitality of the agricultural sector but also aligns with broader environmental goals by promoting resource conservation and reduced chemical usage, marking a significant shift toward sustainable agricultural practices globally.

## Market Segmentation

### Segmentation 1: by Application

Field Preparation

Precision Fertilization

Precision Planting

Precision Irrigation

Others

### Precision Irrigation Application to Lead the Guidance and Steering System for Precision Agriculture Market

Precision irrigation systems, an integral component of the precision agriculture market, are poised to dominate by enhancing efficiency and resource management. These systems utilize advanced guidance and steering technologies to optimize water usage, targeting only the areas that require watering based on real-time data and analytics. This reduces water consumption and boosts crop yield and quality by ensuring precise water application. Market leaders in precision agriculture are increasingly adopting these technologies, driven by the growing global emphasis on sustainable farming practices and the need to increase food production with diminishing natural resources. As a result, companies that innovate and integrate advanced sensory and data analysis capabilities into their irrigation solutions are likely to secure a competitive advantage and lead the guidance and steering system for precision agriculture ecosystem.

### Segmentation 2: by Type

Hardware

Software

## Software to Hold the Largest Share in the Guidance and Steering System for Precision Agriculture Market (by Type)

The software type that leads the guidance and steering system for precision agriculture market, predominantly stands out due to its integration of cutting-edge technologies such as GPS and machine learning. This software enhances operational efficiency by enabling precise control over planting, fertilizing, and harvesting processes. The use of GPS technology ensures high accuracy in navigation, significantly reducing overlaps and missed spots, which translates into cost savings and resource efficiency for farmers. Furthermore, the incorporation of machine learning algorithms allows the software to analyze large datasets to predict crop yields and soil health, helping to make informed decisions that optimize agricultural outputs. These features streamline agricultural operations and contribute to sustainable farming practices by reducing waste and minimizing the environmental footprint. This comprehensive utility is why such software types have gained a dominant position in the market, as they cater to the increasing demand for technology-driven, efficient, and sustainable agriculture practices.

### Segmentation 3: by Hardware Type

GPS/GNSS Receivers

Sensors

Steering Components

Display and Controllers

Others

## GPS/GNSS Receivers to Lead the Guidance and Steering System for Precision Agriculture Market

GPS/GNSS receivers are critical components in the guidance and steering systems used in precision agriculture, a sector that significantly benefits from advancements in satellite navigation technology. These receivers enable farmers to conduct ultra-precise

field operations, reducing overlaps and gaps in planting, fertilizing, and spraying, thus enhancing yield and efficiency. The market leadership of GPS/GNSS receivers in this context is underpinned by their ability to provide real-time data with exceptional accuracy. This precision is crucial for modern farming techniques such as variable rate technology (VRT) and automated steering systems, which rely on exact positioning to optimize resource application and crop management. As agriculture continues to embrace technology, the demand for high-performance GPS/GNSS receivers is expected to grow, driven by their proven impact on operational efficiency and resource management in farming. All these factors are expected to drive the guidance and steering system for precision agriculture industry.

#### Segmentation 4: by Region

North America

Europe

Asia-Pacific

South America

Middle East and Africa

#### Asia-Pacific Region to Dominate the Guidance and Steering System for Precision Agriculture Market

The Asia-Pacific region is poised to dominate the guidance and steering system for precision agriculture market due to several strategic factors. This region's rapid technological adoption, coupled with a large agricultural base, drives significant investment in precision farming tools. Countries such as China, India, and Japan are spearheading these advancements, focusing on enhancing crop yields and efficiency through technology. Furthermore, government initiatives promoting smart agricultural practices and the availability of high-speed internet in rural areas amplify the integration of advanced guidance systems. This not only optimizes resource use but also addresses the challenges posed by labor shortages and the pressing need for sustainable farming practices. As a result, the Asia-Pacific guidance and steering system for precision agriculture market is expected to see robust growth in precision agriculture technologies, including GPS and sensor-based systems, which are essential

for real-time field monitoring and automated decision-making.

## Recent Developments in the Guidance and Steering System for Precision Agriculture Market:

AGCO's recent acquisition of JCA Industries in May 2022 is a significant development in this field. This move is aimed at strengthening AGCO's engineering and software development capabilities, which are essential for advancing highly automated and autonomous agricultural machinery. The acquisition demonstrates AGCO's commitment to enhancing its guidance and technological expertise in steering systems.

In 2023, New Holland presented a range of new products, including the T7.340 HD tractor equipped with PLM Intelligence and a series of advanced propulsion alternatives, emphasizing sustainable agriculture through the use of methane and electric power sources. They also introduced the IntelliView 12 Guidance Kit, expanding its precision technology offerings. This highlights New Holland's focus on integrating advanced technologies to improve farming efficiency and sustainability.

In May 2022, the government of Spain boosted the agri-food Strategic Project for Economic Recovery and Transformation (PERTE) budget from \$1 billion to \$1.81 billion. This increased funding will address three primary areas: enhancing traceability and food safety, improving industry sustainability and competitiveness, and advancing the development of new products along with digital technologies and services.

## Demand - Drivers, Challenges, and Opportunities

### Market Drivers

The substantial 30% yield loss experienced by maize in 2022 serves as a compelling driver for the adoption of guidance and steering systems in precision agriculture. Traditional farming methods, which often involve uniform input application and manual labor, result in inefficient resource use and increased vulnerability to pests, diseases, and climate variations. These methods fail to account for the diverse conditions across different field areas, leading to significant crop losses. By integrating precision agriculture technologies such as guidance and steering systems, farmers can

dramatically enhance the accuracy of field operations. These advanced tools enable precise planting, optimized input application, and minimize resource wastage, effectively reducing the risk of crop losses. Moreover, the ability to integrate climate data and real-time monitoring helps farmers adapt more effectively to environmental changes, further safeguarding crop yields against the growing challenges posed by climate variability. All these factors are expected to considerably support the growth of guidance and steering system for precision agriculture market.

### Market Restraints

Cybersecurity emerges as a significant restraint in guidance and steering system for precision agriculture market, reflecting growing vulnerabilities as farms increasingly adopt digital technologies. The widespread use of GPS-based auto-steer systems and data-driven platforms enhances the risk of cyberattacks, which could disrupt farm operations, manipulate critical data, or allow unauthorized remote control of machinery. This threat is compounded by the reliance on cloud-based infrastructure and IoT devices, which expose agricultural operations to potential data breaches and unauthorized access. Particularly at risk are smaller farms that often lack the necessary resources and expertise to implement robust security measures, making them more susceptible to cyber threats. This security gap poses a serious challenge, potentially slowing the adoption of advanced agricultural technologies as farmers must consider the risks of cyberattacks against the operational benefits. Ensuring the protection of these technologies from cyber threats is crucial for maintaining their reliability and security, which is vital for the continued advancement of precision farming practices.

### Market Opportunities

Precision farming, enhanced by cutting-edge guidance and steering systems, presents a significant opportunity to address the pivotal challenge of food loss and waste, which is particularly critical as global food demand escalates. These technologies allow farmers to significantly enhance the precision of operations such as planting, harvesting, and input application, thereby improving overall efficiency. For instance, guidance systems enable more accurate seed placement, leading to uniform crop growth and reducing resource wastage through minimized gaps and overlaps. This not only combats initial food loss but also increases crop yields. Similarly, during harvesting, auto steering and other precise machinery control technologies ensure that crops are collected more effectively, with reduced damage and minimal loss, thus enhancing the volume of produce that reaches markets. Furthermore, precision farming optimizes the application of vital inputs such as fertilizers, water, and pesticides. By ensuring these

resources are applied with pinpoint accuracy, the technology prevents over-application and runoff, safeguarding crop health and yield while contributing to more sustainable agricultural practices. Collectively, these advancements in precision agriculture offer a transformative potential to make farming more efficient, sustainable, and productive, aligning with broader global efforts to enhance food security and environmental sustainability.

How can this report add value to an organization?

**Product/Innovation Strategy:** This report provides a comprehensive product/innovation strategy for the global guidance and steering systems for precision agriculture market, identifying opportunities for market entry, technology adoption, and sustainable growth. It offers actionable insights, helping organizations leverage the market to meet environmental standards, gain a competitive edge, and capitalize on the increasing demand for eco-friendly solutions in various industries.

**Growth/Marketing Strategy:** This report offers a comprehensive growth and marketing strategy designed specifically for the global guidance and steering systems for precision agriculture market. It presents a targeted approach to identifying specialized market segments, establishing a competitive advantage, and implementing creative marketing initiatives aimed at optimizing market share and financial performance. By harnessing these strategic recommendations, organizations can elevate their market presence, seize emerging prospects, and efficiently propel revenue expansion.

**Competitive Strategy:** This report crafts a strong competitive strategy tailored to the global guidance and steering systems for precision agriculture. It evaluates market rivals, suggests methods to stand out, and offers guidance for maintaining a competitive edge. By adhering to these strategic directives, companies can position themselves effectively in the face of market competition, ensuring sustained prosperity and profitability.

Research Methodology

Factors for Data Prediction and Modeling

The scope of this report focuses on several types of guidance and steering system for precision agriculture applications and products.

The base currency considered for the market analysis is US\$. Currencies other



than the US\$ have been converted to the US\$ for all statistical calculations, considering the average conversion rate for that particular year.

The currency conversion rate has been taken from the historical exchange rate of the Oanda website.

Nearly all the recent developments from January 2021 to July 2024 have been considered in this research study.

The information rendered in the report is a result of in-depth primary interviews, surveys, and secondary analysis.

Where relevant information was not available, proxy indicators and extrapolation were employed.

Any economic downturn in the future has not been taken into consideration for the market estimation and forecast.

Technologies currently used are expected to persist through the forecast with no major breakthroughs in technology.

## Market Estimation and Forecast

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global guidance and steering system for precision agriculture market.

The market engineering process involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes is explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the guidance and steering system for precision agriculture market.

## Primary Research

The primary sources involve industry experts from the global guidance and steering system for precision agriculture market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of reports segmentation and key qualitative findings
- understanding the competitive landscape
- validation of the numbers of various markets for market type
- percentage split of individual markets for geographical analysis

## Secondary Research

This research study of the global guidance and steering system for precision agriculture market involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as ITU, Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market.

Secondary research was done to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- segmentations and percentage shares
- data for market value
- key industry trends of the top players of the market

qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

quantitative data for mathematical and statistical calculations

### Key Market Players and Competition Synopsis

The companies that are profiled in the global guidance and steering system for precision agriculture market have been selected based on input gathered from primary experts and analyzing company coverage, product portfolio, and market penetration.

Some of the prominent names in this market are:

Trimble Inc.

Ag Leader Technology

TeeJet Technologies

Hexagon AB

Deere & Company

Topcon

CNH Industrial N.V.

FJDYNAMICS PTE.LTD

Farmscan Pty Ltd

Beijing UniStrong Science & Technology Co., Ltd.

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