

Smart Vineyard and Orchard Equipment Market - A Global and Regional Analysis: Focus on Application, Product, and Region - Analysis and Forecast, 2023-2028

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Abstracts

Introducing the Smart Vineyard and Orchard Equipment Market

As of 2022, the global smart vineyard and orchard equipment market was valued at a substantial \$3.56 billion. What's even more exciting is the projected growth ahead, with a remarkable CAGR of 9.2% forecasted during the period from 2023 to 2028, ultimately culminating in a market worth \$5.95 billion by 2028. The driving force behind this growth? An increasing demand for efficient and sustainable agricultural practices.

The Essence of Smart Vineyard and Orchard Equipment

Smart vineyard and orchard equipment epitomizes the marriage of cutting-edge technologies and the agriculture sector. It harnesses advanced tools and technologies to enable data collection, facilitate informed decision-making, and automate critical processes. These innovations play a pivotal role in elevating the productivity and efficiency of wine production, marking a substantial shift towards precision agriculture methodologies.

In the European Union, fruit and vegetable production surged to an estimated \$79.7 billion in 2022, constituting over 14% of the total agricultural output. However, a significant portion of tasks in this sector remains reliant on manual labor, often performed by temporary workers. With rising labor costs, declining market prices, and a shortage of skilled laborers, the fruit sector faces a pressing need for automation and robotics to tackle these challenges while addressing mounting environmental concerns.

In 2022, the global smart vineyard and orchard equipment market reached an impressive valuation of \$3.56 billion. Over the forecasted period, this market is set to demonstrate a noteworthy CAGR of 9.2%, ultimately reaching a value of \$5.95 billion by 2028. The expansion of this market is driven by an array of significant factors. These include the increasing global demand for food, the shrinking availability of water resources and arable land, the scarcity of agricultural labor, and the upward trajectory of agricultural input costs. The cumulative impact of these factors is expected to fuel the widespread adoption of smart vineyard and orchard equipment, empowering farmers to optimize resource allocation, enhance crop management practices, and ultimately elevate agricultural productivity.

Market Segmentation:

Segmentation 1: by Application

Crop Monitoring

Harvesting

Weeding and Spraying

Irrigation and Fertigation Management

Others

Weeding and Spraying: Dominating the Application Segment

During the forecasted timeframe, the weeding and spraying segment is expected to seize a substantial market share in the global smart vineyard and orchard equipment market. Regions such as the U.K., Europe, and China are poised to experience significant growth in weeding and spraying. This can be attributed to the escalating adoption of precision agriculture practices, a growing demand for sustainable farming solutions, and the imperative to optimize resource utilization for enhanced crop management.

Segmentation 2: by Product

Drones

Robots

Tractors

Stationary Devices

Tractor Mounted Equipment

During the forecasted period, the robots segment is expected to hold a significant market share in the global smart vineyard and orchard equipment market. Regions such as the U.K., Europe, and China are expected to experience notable CAGR in this segment. These regions, characterized by vast geographical areas and diverse terrains, face challenges in achieving efficient logistics and delivery operations.

Drones have revolutionized the way vineyards and orchards are managed. They provide growers with detailed information about their crops, enabling them to optimize yields and reduce waste. The use of drones in the smart vineyard and orchard equipment market is still in its early stages, but it is growing rapidly. This growth is driven by the increasing adoption of advanced technologies, the need for more accurate and timely data collection in agriculture, and the increasing focus on sustainable farming practices.

The integration of autonomous robots and tractors presents a significant prospect for enhancing operational efficiency within vineyards and orchards. By delegating tasks such as pruning, leaf removal, and spraying to autonomous robots, substantial reductions in labor costs and notable increases in productivity can be achieved. The primary objective behind the implementation of robots in vineyards and orchards is to transform each farm vehicle into a multifunctional platform capable of continuous data collection for comprehensive assessment purposes.

The agricultural industry is on the verge of a transformative period with the emergence of semi-autonomous and autonomous tractors that leverage geographic information systems and AI data. This technological advancement holds immense potential, offering advantages such as enhanced sustainability, precise management of vineyards and orchards, reduced labor requirements and expenses, decreased reliance on diesel fuel in favor of electric batteries, and overall cost reduction.

Farmers are increasingly compelled to adapt their irrigation methods and water resource management in light of changing climatic conditions. To achieve sustainability and optimize efficiency while ensuring the health and vigor of their apple orchards, one viable approach is the utilization of autonomous irrigation systems. Handheld devices, such as smart displays, have significantly impacted the efficiency of managing vineyards and orchards. The incorporation of multi-tag technologies in these handheld devices further enhances the overall context of vineyard and orchard management. Sensing devices play a vital role in the realm of smart vineyard and orchard equipment, enabling real-time monitoring and data collection to optimize crop yields and enhance the quality of the final product. Sensing devices in orchards and vineyards include weather stations, soil moisture sensors, leaf and canopy sensors, temperature sensors, and pest monitoring systems. Their integration enables data-driven decisions, resource efficiency, and improved crop yield and health.

Segmentation 3: by Region

North America - U.S., Canada, Mexico, and Rest-of-North America

Europe - Germany, France, Italy, Spain, Netherlands, Belgium, Switzerland, and Rest-of-Europe

China

U.K.

Asia-Pacific - Japan, India, Australia and New Zealand, and Rest-of-Asia-Pacific

South America - Argentina, Brazil, and Rest-of-South America

Middle East and Africa - South Africa, Turkey, and Rest-of-Middle East and Africa

During the forecast period, Europe, North America, and Asia-Pacific are projected to witness substantial demand for smart vineyard and orchard equipment. The consolidation of small farms and the consequent expansion of average field sizes is expected to create favorable conditions for the adoption of smart vineyard and orchard equipment.

The utilization of smart vineyard and orchard equipment is witnessing a notable expansion in Europe, North America, Asia-Pacific, and the Middle East and Africa. This growth can be attributed to heightened research and development activities, alongside experimental field studies conducted by institutions and government entities aimed at assessing the economic advantages associated with smart vineyard and orchard equipment. In South America, China, and the U.K., the rapid proliferation of start-up ventures, coupled with the demand for efficient input utilization in food production to minimize costs, is driving the adoption of smart vineyard and orchard equipment, consequently stimulating market growth.

Recent Developments in the Global Smart Vineyard and Orchard Equipment Market

In March 2023, YANMAR HOLDINGS CO., LTD. announced that its new smart vineyard robot, the YV01, is now in full production and available for the champagne and wine market in France. The spraying robot is fully autonomous. It relieves wine growers with labor-intensive work in vineyards and improves productivity, profitability, and safety.

In January 2023, KUBOTA Corporation had an alliance with Deere & Company. The goal of the alliance is to accelerate the development and commercialization of new technologies that can help farmers improve their productivity and sustainability.

In September 2021, Deere & Company had a joint venture with AgEagles Aerial Systems Inc. The goal of the joint venture is to develop and market unmanned aerial vehicles (UAVs) for agricultural applications.

Demand – Drivers, Limitations, and Opportunities

Market Drivers: Growing Need to Reduce Orchard and Vineyard Crop Losses

Similar to the broader agricultural sector, the orchard and grape industry is poised to encounter significant challenges in the foreseeable future. These challenges encompass dynamic climatic conditions, the emergence of invasive pests, and an unpredictable labor market, among others. In this context, the success of growers lies in their willingness to adapt their orchard and vineyard operations by embracing innovative ideas and technologies. By incorporating these advancements, growers can effectively cultivate high-quality grapes and fruits while optimizing resource inputs, thereby ensuring not only survival but also sustainable growth in the industry.

Data-driven decision-making in orchard and vineyard farming empowers farmers with objective data, improving farm management, efficiency, and profitability. It enables precise practices, risk management, resource efficiency, and productivity. By analyzing data on soil, crop health, weather, and market trends, farmers can make informed decisions, reducing waste and aligning production. Additionally, it addresses labor shortages and cost pressures through skill transfer and task automation. The result is higher yields, better quality, cost savings, and sustainable practices.

In contemporary agriculture, the industry is compelled to fulfill multiple objectives simultaneously, encompassing international competitiveness, high-quality agricultural product output, and adherence to sustainability objectives. To maintain competitiveness, agricultural producers acknowledge the significant potential offered by emerging information technologies. Organic farming practices persist as one of the substantial trends in orchard and vineyard production and are not expected to diminish. In response to consumer demand, individuals seek organic attributes in significant purchases, necessitating equipment designers and manufacturers to address this requirement.

Organic production is an environmentally sustainable management system characterized by specific objectives and principles, which are supported by detailed production regulations. This integrated approach to farming involves a combination of methods that yield various benefits and trade-offs. According to the European Commission's 2023 report, the proportion of agricultural land in the EU dedicated to organic farming experienced a notable increase of over 50% between 2012 and 2020, with an average annual growth rate of 5.7%.

Market Challenges: Lack of Standardization and Compatibility Issues

The smart vineyard and orchard equipment market is characterized by a wide range of manufacturers, each employing proprietary designs, specifications, and compatibility criteria. This lack of standardization poses challenges for farmers who encounter difficulties in seamlessly integrating equipment from different brands, leading to compatibility issues. Interoperability problems arise due to the inability of equipment from diverse manufacturers to communicate effectively with each other, impeding automation processes and hindering data sharing.

The proliferation of agricultural technology has led to a corresponding rise in cyber threats within the sector. With the adoption of precision agriculture techniques for orchards and vineyards, which rely on the utilization of GPS, satellite imagery, internet-connected sensors, and other advanced technologies, farmers can achieve greater

efficiency in their farming practices. While these methods have the potential to enhance crop yields and decrease expenses, they also expose farmers to significant cybersecurity risks.

The implementation and effective utilization of advanced equipment and technologies require specialized knowledge and expertise, which is often lacking in the workforce of wine and orchard growers. The absence of adequately trained personnel hinders the adoption and integration of smart equipment, thereby impeding the overall expansion of the market.

One of the primary challenges faced by wine and orchard growers pertains to their limited capacity to invest in and modernize their production practices. The high costs associated with acquiring equipment pose significant difficulties for small and medium-scale orchard farmers who seek to invest in modern and efficient machinery. This financial constraint hampers their ability to embrace advanced equipment and technologies, consequently impeding the overall progress of the market.

Market Opportunities: Integral Offering with Horizontal Integration in Farming

Horizontal integration in agriculture refers to the strategic expansion of a farming or agricultural business through the acquisition or merger of similar operations within the industry. This approach enables farmers and agricultural companies to enhance their control over production and distribution processes while capitalizing on economies of scale.

Affordable small robots available for purchase or rental present a viable alternative in areas with limited labor resources and where conventional machinery is either unavailable or prohibitively expensive for small-scale farmers. While farmers typically own most of their equipment, the utilization of leasing or service-based models could prove advantageous for both farmers and equipment providers in the case of robotics. The introduction and adoption of small agricultural robots capable of performing tasks more efficiently, within shorter time frames, and at a reasonable cost may offer an appealing business model for aspiring entrepreneurs in rural regions. By embracing robotics, rural youth may develop an interest in innovative agricultural technologies, which could lead to the emergence of new employment opportunities through rural mechanization and partial automation.

How can this report add value to an organization?

Product/Innovation Strategy: The product segment helps the reader understand the different technologies used for smart vineyard and orchard equipment and their potential globally. Moreover, the study gives the reader a detailed understanding of the different solutions provided by the smart vineyard and orchard equipment providers, such as imaging, processing, and analyzing. Compared to conventional agricultural methods, smart vineyard and orchard equipment enables more exact targeting of planting, soil mapping, and forestry, allowing farmers to save money by maximizing the use of their inputs.

Growth/Marketing Strategy: The global smart vineyard and orchard equipment market has seen major development by key players operating in the market, such as business expansion, partnership, collaboration, and joint venture. The favored strategy for the companies has been partnership, collaboration, and joint venture activities to strengthen their position in the global smart vineyard and orchard equipment market.

Competitive Strategy: Key players in the global smart vineyard and orchard equipment market analyzed and profiled in the study involve smart vineyard and orchard equipment-based product manufacturers, including market segments covered by distinct product kinds, applications served, and regional presence, as well as the influence of important market tactics. Moreover, a detailed competitive benchmarking of the players operating in the global smart vineyard and orchard equipment market has been done to help the reader understand how players stack against each other, presenting a clear market landscape. Additionally, comprehensive competitive strategies such as partnerships, agreements, and collaborations will aid the reader in understanding the untapped revenue pockets in the market.

Methodology

Key Considerations and Assumptions in Market Engineering and Validation

The scope of this report has been focused on various types of smart vineyard and orchard equipment.

The market revenue has been calculated based on global smart vineyard and orchard equipment.

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 2019 to June 2023 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 have been employed.

Any future economic downturn has not been considered for the market estimation and forecast.

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

Primary Research

The primary sources involve the smart vineyard and orchard equipment industry experts and stakeholders such as data suppliers, platform developers, and service providers. Respondents such as vice presidents, CEOs, marketing directors, and technology and innovation directors have been interviewed to verify this research study's qualitative and quantitative aspects.

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 region-wise analysis

Secondary Research

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to the aforementioned data sources, the study has been undertaken with the help of other data sources and websites, such as <https://www.euspa.europa.eu/> and <https://www.worldbank.org/en/home>.

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.

Key Market Players and Competition Synopsis

Our selection of companies for profiling was meticulous, involving inputs from primary experts and a comprehensive analysis of company coverage, product portfolios, and market penetration.

At the forefront of the global smart vineyard and orchard equipment market are leading players, including private and start-up companies, which commanded an impressive 83.3% market share in 2021. The remaining 16.7% was claimed by public companies.

Here are some prominent names that have firmly established themselves in this dynamic market:

YANMAR HOLDINGS CO., LTD.

KUBOTA Corporation

Deere & Company

XAG Co., Ltd.

DJI

Na?o Technologies

Robotics Plus Limited

Agrobot

Tevel Aerobotics Technologies

Aigro BV

Saga Robotics AS

Monarch Tractor

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