

Global Irrigation Automation Market By Application (Agricultural and Non-Agricultural), By Irrigation Type (Drip Irrigation, Sprinkler Irrigation and Surface Irrigation & Others), By Type (Time-based, Volume-based, Realtime-based and Others), By Component (Controllers, Sensors, Valves, Sprinklers and Others), By Region, Industry Analysis and Forecast, 2020 - 2026

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Abstracts

The Global Irrigation Automation Market size is expected to reach \$7.9 billion by 2026, rising at a market growth of 22% CAGR during the forecast period. Automatic irrigation involves the incorporation of hardware components, like controllers, sensors, sprinklers, valves, and other components, in order to build an automated system for both agricultural and non-agricultural applications. These automatic systems facilitate the user to adjust the irrigation process depending on the real-time data, volume, time, and computer-based systems that help to control the watering. Furthermore, irrigation automation systems are frequently used in a massive irrigated area, which is further divided into small segments that are termed as irrigation blocks. These segments are then watered in sequence in order to match the discharge that is available from the water source.

The market is likely to show an incremental rise in demand owing to an increase in water scarcity conditions and a changing trend concerning the mechanization of agricultural processes in the world. Growing water crisis along with random and unpredictable rainfall patterns is markedly hindering the use of traditional agrarian irrigation techniques, therefore it is accelerating the demand for the use of more

advanced irrigation techniques that were adopted for cultivation globally. Irrigation automation systems require no or minimum manual intervention in addition to surveillance. Similarly, these automation systems also minimize the wastage of water, labor costs, and constant monitoring.

A number of governments all across the world are supporting the setting up of irrigation automation systems due to the increasing issue of shortage of water. For example, the government of Australia has initiated numerous R&D projects to improve water usage efficiency. Furthermore, the government has also announced the On-farm Irrigation Efficiency Program for supporting the individual irrigators to augment their irrigation infrastructure or alter the irrigation practices in order to save water. Some of the major practices include setting up of automatic outlets or gates and water metering, and the use of telemetry systems.

Due to the recent outbreak of coronavirus (COVID-19), manufacturers and sellers of irrigation automation have been facing numerous production issues, such as non-availability of raw materials, factory shutdowns, and shortage of resources. Similarly, the COVID-19 has also resulted in disruptions in the small and large supply chain in the agriculture ecosystems. The hardware equipment's supply has been slowed down and affected the market players all across the irrigation automation supplier. Though, the remote irrigation operations are less affected by the current pandemic owing to less human intervention, and are likely to show more vigorous demand in the coming years.

Based on Application, the market is segmented into Agricultural and Non-Agricultural. Agricultural Segment is further classified across Open Fields and Greenhouses & Others. Based on Irrigation Type, the market is segmented into Drip Irrigation, Sprinkler Irrigation and Surface Irrigation & Others. Based on Type, the market is segmented into Time-based, Volume-based, Realtime-based and Others. Based on Component, the market is segmented into Controllers, Sensors, Valves, Sprinklers and Others. Based on Regions, the market is segmented into North America, Europe, Asia Pacific, and Latin America, Middle East & Africa.

The major strategies followed by the market participants are Partnerships and Acquisitions. Based on the Analysis presented in the Cardinal matrix; Valmont Industries, Inc., the Toro Company and Orbia Advance Corporation are the forerunners in the Irrigation Automation Market. Companies such as Lindsay Corporation, Jain Irrigation Systems Limited, Rain Bird Corporation, Rubicon Water, Hunter Industries, Inc., and Telsco Industries, Inc. are some of the key innovators in the market.

The market research report covers the analysis of key stake holders of the market. Key companies profiled in the report include The Toro Company, Valmont Industries, Inc., Lindsay Corporation, Orbia Advance Corporation (Netafilm Ltd.), Hunter Industries, Inc., Rain Bird Corporation, Jain Irrigation Systems Limited, Rubicon Water, Galcon Ltd. and Telsco Industries, Inc. (Weathermatic).

Recent strategies deployed in Irrigation Automation Market

Partnerships, Collaborations, and Agreements:

Oct-2020: Lindsay Corporation came into an agreement with Microsoft. Following this agreement, Lindsay would develop intelligent digital solutions using Microsoft Azure. The development aimed to enhance irrigation management, broaden the detection and reporting of irrigation system issues, and helps growers evaluate and continuously improve the sustainability and profitability of their operations.

Sep-2020: Hunter Industries announced its collaboration with Augmentir, Inc., the leading provider of artificial intelligence-based connected worker software for industrial companies. Under this collaboration, the former company selected the latter company as its next-generation Connected Worker platform for its manufacturing operations. The platform reinforced those themes, enabling Hunter to deliver digital tools that help their manufacturing workforce perform at their best and improve overall efficiency.

Jul-2020: Netafim signed an agreement with North American growers. Under this agreement, the company was aimed to supply North American growers with Sentek's soil sensors, which would be integrated with its NetBeat irrigation management platform. Through the agreement, Netafim can help North American growers in equipping them with a complete digital farming solution. The solution can integrate automated irrigation control, fertigation, and crop protection recommendations through NetBeat, its irrigation and fertigation management platform.

Mar-2020: Netafim collaborated with FluroSat, a leading company in remote field sensing and analytics. The collaboration was focused on integrating FluroSat's data into Netafim's automated irrigation and fertigation cloud-based platform, NetBeat. The integration enabled easier, more precise, and more reliable irrigation, fertigation, and crop management decisions. With this collaboration, Netafim's customers got access to advanced crop monitoring tools as a standalone monitoring and analysis service or directly integrated into Netafim's NetBeat. This resulted in site-specific irrigation recommendations with near-real-time adjustment of irrigation and fertigation quantities based on the current crop condition assessed by FluroSense.

Feb-2020: Valley Irrigation came into partnership with Cordoba Technologies, Inc. (CTI), an innovator in automated, high-precision application systems for crop protection

products. Together, the companies were aimed to research the most effective ways to enhance the technology, innovating and redefining the functionality of center pivots. The companies' objective is to further reduce the amounts of chemicals growers use, support plant health, and give growers more crop management options.

Jan-2020: Netafim announced its collaboration with Arable Labs, the leader in innovative field-sensing and analytics. Under this collaboration, Arable's data was integrated into Netafim's automated irrigation and fertigation cloud-based platform, NetBeat. This integration made irrigation, fertigation, and crop management decisions easier, more precise, and more reliable.

Sep-2019: Weathermatic teamed up with Aspire Software Solutions (US). Following the collaboration, the companies were focused on developing new cloud-based, cost-effective software for improving the management of irrigation processes. This helped the company in providing mobile-based business software with expert water management tools to the customer.

Feb-2019: Valmont Industries, the parent company of Valley Irrigation partnered with Prospera Technologies Inc., an agriculture technology data company that develops intelligent solutions for farmers to grow crops more efficiently. The collaboration provided growers with autonomous crop management solutions generating greater returns while requiring fewer production inputs and resources.

Feb-2019: Rubicon Water signed an agreement with the Karnataka Government for modernizing the Narayanpur Left Bank Canal (NLBC) system in the Indian state of Karnataka. The project automated around 3,000 km of canals and provided 450,000 hectares of farmland with a reliable and efficient irrigation water supply. The Karnataka government and the Indian central government through the Pradhan Mantri Krishi Sinchayee Yojana (PMKSY) scheme funded the project as part of a drive to improve regional water security, boost agricultural productivity, and remove obstacles to economic growth. The project improved the livelihoods of farmers by providing them with a reliable, near on-demand water supply service, which will enable them to grow more diverse and higher-value crops.

Jan-2019: Lindsay collaborated with Nutrien Ag (US) Solutions. The collaboration was focused on automating the transfer of data from Lindsay's FieldNET advisor to Nutrien's digital platform. This collaboration helped in streamlining the flow of data and will provide more precise irrigation monitoring to the farmers.

Acquisition and Mergers:

Jul-2020: Lindsay Corporation acquired Net Irrigate, LLC, an agriculture Internet of Things technology company that provides remote monitoring solutions for irrigation customers. Following the acquisition, both companies' shared goals of delivering innovative real-world solutions to help growers increase water and energy efficiency and exercise more sustainable farming practices while operating and maintaining irrigation

systems.

Jun-2020: Valmont Industries, Inc. acquired a majority stake in Energia Solar do Brasil (Solbras), a leader in the photovoltaic (PV) energy sector. The acquisition expanded its business globally through the strength of its dealer network.

Sep-2018: Jain Irrigation completed its acquisition of ETwater, an innovator of intelligent irrigation technology and in the vanguard for the creation of the smart irrigation controller. The acquisition solved the real-world problems of water scarcity.

Aug-2018: Valmont Industries, Inc. took over the majority ownership stake in Convert Italia SpA, a designer and provider of engineered solar tracker solutions. The acquisition was focused on the advancement of strategy to grow market adjacencies in its Utility Support Structures business. The combination provided single-axis tracker technology with Valmont global manufacturing capabilities and utility customer base, allowing an integrated solar tracker solution to utility-scale customers around the world.

Feb-2018: The Toro Company invested minority equity in GreenSight Agronomics, a Boston-based provider of automated, agronomic intelligence technologies for turfgrass and agricultural markets. The investment was made for applying the latest technologies and analytics of GreenSight Agronomics with the water management expertise of Toro Company to further provide our customers with the best solutions.

Feb-2018: Valmont Industries announced the acquisition of a majority interest in Indiana-based, Torrent Engineering & Equipment. The acquisition enabled the company to develop the systems that make irrigation simple.

Apr-2017: Jain Irrigation Systems together with its subsidiary, in the USA, acquired 80% stake in 2 US entities. Both the entities are the United States' largest micro-irrigation dealers: Agri-Valley Irrigation, Inc. and Irrigation Design and Construction, Inc. Both the companies merged the ownership of their businesses into a newly formed distribution company. The new organization is the leader in the design, construction, service, and innovative Ag Technology. This company provides a unique platform to help growers implement state-of-the-art irrigation technology and achieve "More Crop Per Drop".

Product Launches and Product Expansions:

Nov-2020: Netafim India announced the launch of FlexNet, a revolutionary mainline and sub-mainline piping for above and below-ground drip irrigation systems for Indian farmers. The piping system provides farmers with a smart and sustainable irrigation mechanism. The premium polypropylene material avoids snaking and ensures the product holds position even in the most stringent climatic and environmental conditions.

May-2020: Toro launched Toro Aqua-Traxx Azul drip tape. The tape features an innovative flow path and was designed for effectively resisting clogging. The Toro Aqua-Traxx Azul drip tape offers a patent-pending filter inlet design and optimized flow passages that not only guard the flow path labyrinth against debris but also pass through more debris to maximize clog resistance and product performance.

Mar-2020: Jain Irrigation unveiled the JAIN Unity. This solution provides an automatic irrigation control system and environmental data services platform. Also, Unity is the first-ever smart irrigation solution for landscape management fully powered by artificial intelligence and predictive analytics.

Feb-2020: Rain Bird released the ESP-LXIVM series controllers. These controllers provide large, challenging sites with advanced water management tools, diagnostics, and a host of new-to-the-industry features. 3

Aug-2019: Lindsay Corporation unveiled the customer-driven irrigation solution. The solution enabled the pivot to automatically reverse, return and stop at the original starting pontfot irrigating part circles.

Scope of the Study

Market Segmentation:

By Application

Agricultural

Open Fields

Greenhouses & Others

Non-Agricultural

By Irrigation Type

Drip Irrigation

Sprinkler Irrigation

Surface Irrigation & Others

By Type

Time-based

Volume-based

Realtime-based

Others

By Component

Controllers

Sensors

Valves

Sprinklers

Others

By Geography

North America

US

Canada

Mexico

Rest of North America

Europe

Germany

UK

France

Russia

Spain

Italy

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Malaysia

Rest of Asia Pacific

LAMEA

Brazil

Argentina

UAE

Saudi Arabia

South Africa

Nigeria

Rest of LAMEA

Companies Profiled

The Toro Company

Valmont Industries, Inc.

Lindsay Corporation

Orbia Advance Corporation (Netafilm Ltd.)

Hunter Industries, Inc.

Rain Bird Corporation

Jain Irrigation Systems Limited

Rubicon Water

Galcon Ltd.

Telsco Industries, Inc. (Weathermatic)

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