

Global Targeted Spray Technology Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Targeted Spray Technology market size is predicted to grow from US\$ 1174 million in 2025 to US\$ 2182 million in 2032; it is expected to grow at a CAGR of 9.3% from 2026 to 2032.

Targeted spray technology is an intelligent pesticide application technology based on real-time sensing and precise control. It uses sensors (such as machine vision, spectroscopy, and lidar) to instantly identify targets (such as weeds, pest-infested areas, or specific crops) and controls the spraying system to apply pesticides precisely and quantitatively only to the identified targets, thereby minimizing pesticide waste, environmental emissions, and pollution to non-target areas. The core demand stems from the multiple pressures facing global agriculture, including increasingly stringent environmental regulations, rising pesticide costs, and labor shortages. Its upstream supply chain includes high-precision sensors (vision/liDAR), AI chip and algorithm developers, high-speed solenoid valve and nozzle manufacturers, and embedded control system suppliers. Downstream, it is directly integrated into the products of intelligent plant protection machinery manufacturers, ultimately serving large farms, agricultural cooperatives, precision livestock and forestry management, etc., helping end-users reduce costs, meet environmental requirements, and improve product quality and safety by achieving precise, reduced-pesticide application. In 2025, the average price of targeted spray technology was approximately \$30,000, with a gross profit margin of approximately 35%.

United States market for Targeted Spray Technology is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

China market for Targeted Spray Technology is estimated to increase from US\$ million

in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Europe market for Targeted Spray Technology is estimated to increase from US\$ million in 2025 to US\$ million by 2032, at a CAGR of % from 2026 through 2032.

Global key Targeted Spray Technology players cover Deere & Company (NYSE: DE, Illinois USA), CNH Industrial N.V. (NYSE: CNHI, London United Kingdom), AGCO Corporation (NYSE: AGCO, Georgia USA), Topcon Positioning Systems (Private, Tokyo Japan), Lemken GmbH & Co. KG (Private, Alpen Germany), etc. In terms of revenue, the global two largest companies occupied for a share nearly % in 2025.

LPI (LP Information)' newest research report, the "Targeted Spray Technology Industry Forecast" looks at past sales and reviews total world Targeted Spray Technology sales in 2025, providing a comprehensive analysis by region and market sector of projected Targeted Spray Technology sales for 2026 through 2032. With Targeted Spray Technology sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Targeted Spray Technology industry.

This Insight Report provides a comprehensive analysis of the global Targeted Spray Technology landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Targeted Spray Technology portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Targeted Spray Technology market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Targeted Spray Technology and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Targeted Spray Technology.

This report presents a comprehensive overview, market shares, and growth opportunities of Targeted Spray Technology market by product type, application, key players and key regions and countries.

Segmentation by Type:

On/Off Targeted Spray

Variable-Rate Targeted Spray

Pulsed Targeted Spray

Segmentation by Decision Basis:

Real-time Sensor-based

Prescription Map-guided

Fusion-based

Segmentation by Application:

Field crop

Orchard

Nursery

Forestry

Animal husbandry

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Deere & Company (NYSE: DE, Illinois USA)

CNH Industrial N.V. (NYSE: CNHI, London United Kingdom)

AGCO Corporation (NYSE: AGCO, Georgia USA)

Topcon Positioning Systems (Private, Tokyo Japan)

Lemken GmbH & Co. KG (Private, Alpen Germany)

Amazonen-Werke H. Dreyer GmbH & Co. KG (Private, Hasbergen Germany)

Deutz-Fahr (Private, Treviglio Italy)

Kubota Corporation (TSE: 6326, Osaka Japan)

Zoomlion Heavy Industry (SZSE: 000157, Hunan China)

Weichai Lovol Smart Agricultural Technology (Private, Shandong China)

FJ Dynamics (Private, Guangdong China)

XAG Co., Ltd. (Private, Guangdong China)

SZ DJI Technology Co., Ltd. (Private, Guangdong China)

One Smart Spray (Private, Illinois USA)

BASF Digital Farming GmbH (Subsidiary of BASF, Cologne Germany)

Bargam Sprayers (Private, Auckland New Zealand)

Spraycision, LLC (Private, Wisconsin USA)

Greeneye Technology Ltd. (Private, Tel Aviv Israel)

Hardi International A/S (Private, Ringsted Denmark)

Agrifac Machinery B.V. (Private, Steenwijk Netherlands)

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