

Irrigation Automation Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Component (Controllers, Sensors, Weather-Based, Soil-Based, Fertigation Sensors, Valves, Sprinklers, Others), By System Type (Automatic and Semi-Automatic), By Automation Type (Time-Based, Volume-Based, Real-time Based, Computer-Based Control System), By Irrigation Type (Sprinkler, Drip, Surface, Lateral Move), By End User (Agricultural and Non-Agricultural), By Region and Competition

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Abstracts

Global Irrigation Automation Market was valued at USD 3.86 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 12.21% through 2028. The process of irrigation using automated systems is referred to as the Irrigation Automation Market. Minimal manual intervention is required for the proper functioning of an automated irrigation system. The Irrigation Automation Market facilitates automatic resolution of every stage in the irrigation process, making it highly beneficial for drip, sprinkler, and surface irrigation systems. By reducing the need for manual labor, this market significantly decreases irrigation costs. Moreover, it is widely adopted due to its ability to conserve water and prevent wastage during irrigation.

To establish a robust Irrigation Automation Market for both agricultural and non-agricultural purposes, hardware components such as controllers, sprinklers, sensors, valves, and other essential elements are indispensable. The government is actively

implementing measures to minimize water waste and optimize water usage for irrigation. The Irrigation Automation Market effectively addresses this concern, enabling efficient irrigation of large land areas. Technological advancements are paving the way for further automation in irrigation systems.

Key Market Drivers

Increasing Investment in Research & Development (R&D) Of Automation Technology

Investment in Research & Development (R&D) of automation technology plays a pivotal role in driving the global demand for irrigation automation. By allocating resources to R&D, companies can harness the power of innovation to develop cutting-edge solutions that address the challenges faced by farmers worldwide. As R&D expenditure increases, the resulting advancements in automation technology led to the creation of irrigation solutions that are not only more efficient but also more reliable. These solutions enable farmers to deliver precise amounts of water at the optimal times, minimizing water waste and maximizing crop yields. The integration of automation technology in agriculture streamlines the management of irrigation systems, freeing up valuable time for farmers to focus on other critical tasks.

Furthermore, automation technology in irrigation promotes sustainability and conservation of water resources, addressing the growing concern of water scarcity in many regions of the world. By optimizing water usage and minimizing wastage, farmers can contribute to the preservation of this precious resource. Investing in R&D allows companies to develop innovative, cost-effective, and user-friendly automation solutions that cater to the diverse needs of farmers in various agricultural contexts. By making irrigation automation more accessible and attractive, these advancements have the potential to revolutionize farming practices on a global scale. Increasing investment in R&D of automation technology is projected to fuel the demand for irrigation automation worldwide, bringing forth a new era of efficient and sustainable agricultural practices.

Technological Advancements in Remote Control & Monitoring Systems

Technological advancements in Remote Control and Monitoring Systems have dramatically reshaped the landscape of irrigation automation. These innovations are expected to fuel global demand due to several compelling factors. The use of cutting-edge technology in these systems allows for a more efficient allocation of water resources. This efficiency not only leads to significant water conservation, but also improves overall crop yield and quality. The ability to remotely control and monitor

Irrigation systems offers unparalleled convenience and flexibility. Farmers can now manage their irrigation systems in real-time from any location, reducing the need for manual intervention and labour costs. The integration of monitoring systems with advanced analytics provides actionable insights about soil health, moisture levels, and weather patterns. This data-driven approach enables better decision-making, ultimately enhancing productivity and profitability. Furthermore, as global emphasis pivots towards sustainable farming and climate change mitigation, the adoption of these advanced systems represents a significant step forward. It contributes towards achieving these objectives by conserving water, reducing energy use, and promoting efficient farming practices. As a result, the outlook for the global demand for irrigation automation, empowered by advancements in remote control and monitoring systems, appears highly promising.

Growing Investment in Smart Agriculture & Precision Farming

The global agricultural sector is witnessing a revolutionary shift, driven by the increasing investment in Smart Agriculture and Precision Farming. These technologies aim to optimize crop yields while minimizing the use of resources like water, fertilizers, and seeds, primarily through the use of advanced systems like Irrigation Automation. Irrigation Automation, a technology that automates the watering process based on the precise needs of each crop, promises to significantly reduce water wastage and improve crop health. Its demand is poised to grow exponentially as more farmers adopt Smart Agriculture and Precision Farming techniques worldwide. This growth is spurred by the recognition that sustainable and efficient farming practices are not just desirable but necessary in a world grappling with climate change and population growth. Simultaneously, the economies of scale resulting from increased manufacturing of Irrigation Automation systems will likely make these systems more affordable and accessible to farmers worldwide, further driving their demand. Hence, the rise of Smart Agriculture and Precision Farming underscores a growing trend towards sustainable and efficient farming practices, which is expected to significantly accelerate the global demand for Irrigation Automation.

Rising Demand for Lawn & Garden Equipment

The global surge in demand for Lawn & Garden Equipment is anticipated to significantly bolster the need for Irrigation Automation systems. As home gardening and landscaping trends gain traction, consumers are increasingly seeking efficient and sustainable methods to maintain their outdoor spaces. Hence, automated irrigation systems, with their ability to regulate water usage, reduce labor costs, and ensure optimal plant

growth, have become a critical component of modern lawn and garden equipment. This demand is further amplified in areas with water scarcity or stringent water use regulations, where irrigation automation offers a solution to maintain aesthetics while adhering to guidelines. Additionally, the advent of smart home technology has reinforced this trend. Consumers are looking to integrate their gardening equipment with smart home systems, driving demand for advanced, internet-connected irrigation automation systems. This global trend not only indicates a brighter future for the irrigation automation market but also underlines the growing consciousness about water conservation and the increasing adoption of technology in everyday life.

Key Market Challenges

High Cost of Installing & Maintaining Irrigation Automation Systems

The high upfront and ongoing costs associated with the installation and maintenance of irrigation automation systems are key factors expected to decrease global demand. While these systems offer the potential for increased efficiency and productivity in agricultural operations, their initial cost can be prohibitive, especially for small-scale farmers and those in developing economies who may lack the financial resources to invest in such technology. Additionally, maintenance costs can also be significant, further adding to the total cost of ownership and potentially offsetting the benefits derived from improved irrigation efficiency.

Moreover, the technical complexity of these systems presents a challenge as operators and farmers require a certain level of technical knowledge and training to effectively operate and maintain them. This requirement can create another barrier to widespread adoption, particularly in regions where access to technical training and education may be limited. Additionally, reliable power supply is crucial for the proper functioning of irrigation automation systems, which can be a challenge in remote or rural areas that may suffer from inconsistent or limited electricity access.

Lack Of Technical Skills Among Farmers

The global demand for irrigation automation, despite its numerous benefits, is expected to decline due to the prevalent lack of technical skills among farmers. Irrigation automation, which entails the use of advanced technology, requires a certain level of technical proficiency for its effective implementation and operation. However, many farmers, especially those in developing regions, lack the requisite skills to leverage this technology. This is largely due to inadequate training and the unavailability of resources

to facilitate learning. Without the necessary technical knowledge, farmers may find the complex nature of irrigation automation systems daunting, leading to a decline in its adoption. Furthermore, farmers who do not fully understand the operation of these systems may experience difficulties in their maintenance, resulting in ineffective use and potential damage. This, in turn, could discourage other farmers from investing in the technology due to perceived complexities and potential costs. Consequently, the global demand for irrigation automation is expected to decrease unless proactive measures are taken to bridge the skill gap among the farming community.

Key Market Trends

Higher Efficiency & Productivity Offered by Automated Irrigation Systems

The global demand for irrigation automation systems is anticipated to witness significant growth, largely driven by the increased efficiency and productivity these systems offer. Automated irrigation systems, by design, optimize water usage, delivering the right amount at the right time. This efficiency not only conserves water resources but also promotes healthier crop growth and yield. Automation further enhances productivity by reducing the need for manual intervention in irrigation processes. As a result, labor costs and time are significantly minimized, freeing up resources for other vital agricultural tasks. In the face of escalating global food demand, the ability to cultivate more with less resources is an invaluable advantage. Moreover, the integration of advanced technologies like AI and IoT in these systems allows for real-time monitoring and adjustments, further boosting their efficiency and productivity. Therefore, considering the critical role of water and labor efficiency in sustainable agriculture, the demand for automated irrigation systems is set to grow worldwide, thereby fostering the expansion of the irrigation automation market.

Reduction in the Operating Cost for Farmers

The reduction in operating costs for farmers is expected to boost the worldwide demand for irrigation automation significantly. One of the primary challenges faced by farmers today is the rising cost of operations, which includes labor, equipment, fuel, and water. This scenario is where irrigation automation steps in, providing a cost-effective and resource-efficient solution. It helps manage and optimize water usage, reducing waste and thereby decreasing water costs. The automation enables farmers to precisely control irrigation schedules based on weather conditions, soil type, and crop needs, reducing labor costs associated with manual irrigation. Moreover, the use of automated systems reduces the wear and tear on equipment, thereby extending their lifespan and

reducing replacement and repair costs. As these systems become more affordable and accessible, more farmers worldwide are expected to adopt them, looking to decrease their operating costs and increase their overall yield and productivity. Consequently, the global demand for irrigation automation is projected to see a significant upswing.

Segmental Insights

Component Insights

Based on the Component, the controller segment dominated the market and accounted for the largest share of global revenue in 2022. This can be attributed to the growing demand for semi-automatic systems, including volume-based and time-based systems, which has consequently increased the demand for controllers in the overall market. Controllers play a crucial role in providing the required amount of water at the right time according to the desired schedule. Additionally, controllers oversee the entire irrigation process, guided by sensors that provide real-time data on weather, soil, and plants, directly influencing the irrigation process.

On the other hand, the sensors segment is projected to emerge as the fastest-growing segment. Sensors play a vital role in acquiring real-time soil moisture levels and determining irrigation requirements. They enhance connectivity and enable access to real-time data through installed apps or web-based interfaces, empowering irrigators to monitor and control irrigation using their smartphones. Moreover, with the precise measurement and prediction of soil moisture temperature through sensors, automated dripping systems and sprinklers can work together seamlessly, resulting in increased productivity with minimal manual intervention. These factors are expected to drive the growth of the sensor segment throughout the forecast period.

Irrigation Type Insights

Based on the Irrigation Type, the drip irrigation segment emerged as the market leader in 2022 and is expected to maintain its dominance during the forecast period. This can be attributed to the system's impressive longevity of nearly ten years, making it a durable and efficient irrigation method that ensures consistent yields. Furthermore, drip irrigation systems effectively mitigate water wastage caused by field run-off and evaporation. Additionally, the segment's growth is driven by its ability to minimize water consumption and the cost-effectiveness of drip systems. Consequently, drip irrigation is widely regarded as the most efficient irrigation method worldwide, with the exception of certain Asia Pacific countries like Japan and China, where water-intensive crops such

as rice are cultivated.

On the other hand, the sprinkler irrigation segment is projected to exhibit a noteworthy compound annual growth rate. Sprinklers facilitate the transfer of water over considerable distances, thereby enhancing water consumption efficiency. Moreover, sprinkler systems can be integrated with intelligent weather-based systems that respond accurately to real-time weather conditions. These systems can be conveniently controlled by operators through smartphones, offering full control over the irrigation process. Additionally, the safety, convenience, and aesthetic advantages provided by sprinkler irrigation contribute to its increased demand across the industry.

Regional Insights

The Asia Pacific region emerged as the dominant player in the market in 2022, capturing a significant revenue share. This dominance is projected to continue over the forecast period, propelled by various factors. Firstly, the region boasts vast agricultural lands, providing ample opportunities for irrigation systems to thrive. Additionally, the rapidly changing climatic conditions in the Asia Pacific region necessitate efficient water management strategies, further driving the demand for advanced irrigation instruments. The strong government support and initiatives aimed at reducing water wastage further contribute to the region's market leadership. Moreover, the decreasing water levels in the region's river basins have led to a shift towards sensor-based irrigation systems, addressing the pressing need for sustainable water usage.

Moving on to the North America region, it is expected to exhibit a significant compound annual growth rate (CAGR). This growth can be attributed to the presence of key market participants, including The Toro Company, Valmont Industries Inc., Rain Birds, Lindsay Corporation, and Nelson Irrigation Corporation. Strict government regulations, particularly in the United States, aimed at reducing the water footprint, are anticipated to further boost market growth in the region.

Furthermore, the Middle East and Africa region is poised to witness notable growth, driven by the significant advancements in automated irrigation systems. These systems have played a pivotal role in strengthening the green revolution in countries like Israel, where efficient water management has become a top priority. The Asia Pacific region's dominance, the growth potential in North America, and the advancements in automated irrigation systems in the Middle East and Africa collectively contribute to the global irrigation systems market's positive outlook.

Key Market Players

The Toro Company

Hunter Industries

Valmont Industries Inc.

Rain Bird Corporation

Lindsay Corporation

Rubicon Water

Weathermatic

Nelson Irrigation

Avanijal Agri Automation Pvt Ltd.

Irritec S.P.A

Report Scope:

In this report, the Global Irrigation Automation Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Irrigation Automation Market, By Component:

Controllers

Sensors

Weather-Based

Soil-Based

Fertigation Sensors

Valves

Sprinklers

Others

Irrigation Automation Market, By System Type:

Automatic

Semi-Automatic

Irrigation Automation Market, By Automation Type:

Time-Based

Volume-Based

Real-time Based

Computer-Based Control System

Irrigation Automation Market, By Irrigation Type:

Sprinkler

Drip

Surface

Lateral Move

Irrigation Automation Market, By End User:

Agricultural

Non-Agricultural

Irrigation Automation Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Irrigation Automation Market.

Available Customizations:

Global Irrigation Automation market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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