

Precision Agriculture Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Technology (Guidance Systems, Remote Sensing and Variable Rate Technologies), By Component (Software and Hardware), By Application (Yield Monitoring, Field Mapping and Others), By Region and Competition

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Abstracts

Global Precision Agriculture Market has valued at USD 8.56 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 9.55% through 2028. Precision agriculture, also known as site-specific crop management (SSCM), is an approach to farm management that enables farmers to increase food production in a cost-effective manner. It encompasses various technologies, including global positioning system (GPS), geographical information system (GIS), remote sensing (RS), and variable rate technology (VRT). By leveraging specialized equipment, software, and information technology (IT) services, precision agriculture provides real-time data on soil conditions, ambient air quality, crop health, labor costs, equipment availability, and local weather forecasts. This data facilitates precise decision-making regarding planting, crop rotation, and harvesting. Furthermore, precision agriculture helps reduce water usage, as well as the application of pesticides, herbicides, and fertilizers. It plays a crucial role in enhancing the profitability, productivity, quality, and sustainability of crops. Given its ability to lower production costs and labor requirements, the demand for precision agriculture continues to grow worldwide.

Key Market Drivers

Technological Advancements in IoT & AI

Advancements in Internet of Things (IoT) and Artificial Intelligence (AI) technologies are set to significantly increase the global demand for precision agriculture. The convergence of these technologies enables farmers and agribusinesses to make more informed decisions through increased accuracy and control in their farming operations. IoT devices, such as sensors and drones, are able to collect vast amounts of data on soil, weather, crops, and livestock. When this data is processed and analyzed by sophisticated AI algorithms, actionable insights can be drawn to optimize farming practices. This might involve determining the optimal time for planting seeds, identifying potential pest outbreaks, or understanding the precise irrigation needs of a field. The result is not only an increase in crop yields and quality, but also a reduction in waste, energy use, and environmental impact - a sustainable model that is becoming increasingly important in the face of climate change and global food security challenges. Such benefits are driving the uptake of precision agriculture globally, with farmers and agribusinesses in both developed and developing countries recognizing the transformative potential of IoT and AI technologies.

Increased Use of Cloud Computing in Farming Practices

The escalation of Cloud Computing in farming practices is expected to amplify the global demand for Precision Agriculture significantly. This technology-driven approach to farming uses real-time data and cloud-based applications for more accurate and controlled agricultural operations. Farmers can now monitor their crops and livestock with unprecedented detail and accuracy, allowing optimization of water and fertilizer usage, yield predictions, and early disease detection. These capabilities are not just reducing costs and increasing efficiency, they are also contributing to environmental sustainability by minimizing waste and overuse of resources. Cloud computing's scalability and accessibility make precision agriculture a viable option for even small-scale farmers, effectively democratizing high-tech farming. This increased usage and accessibility of cloud computing are expected to drive a surge in demand for precision agriculture worldwide, as farmers seek to leverage technology to increase yield, efficiency, and profitability, while simultaneously reducing their environmental footprint. Over time, it's anticipated that the global agriculture industry's reliance on precision and technology will only continue to grow.

Rise in the Usage of Smartphone Applications Tailored for Precision Agriculture

The global rise in the adoption of smartphones has significantly contributed to the increased demand for Precision Agriculture. Precision Agriculture is an innovative

approach to agricultural management that utilizes information and technology to ensure crops and soil receive precisely what they need for optimal health and productivity. The advent of smartphone applications tailored specifically for Precision Agriculture has made this method even more accessible and efficient for farmers worldwide. These applications use a variety of technologies, including GPS, satellite imagery, and on-site sensors to deliver real-time data about the condition of the fields, making precision agriculture a more streamlined and informed process. This data-driven approach enables farmers to monitor and manage their crops at the granular level, reducing the use of resources such as water, fertilizer, and pesticides, thereby decreasing environmental impact and increasing sustainability. It also allows for more accurate prediction of crop yields, leading to better planning and profitability. In essence, the rise in the usage of such smartphone applications is set to expedite the global demand for Precision Agriculture, marking a significant stride towards a more sustainable and efficient future in agriculture.

Increasing Acceptance of Automated Farming Solutions

The increasing acceptance of automated farming solutions is expected to significantly boost the global demand for precision agriculture. Farmers are progressively recognizing the benefits of automated and Precision Agriculture, as these technologies offer solutions for managing the variability of crops, thereby optimizing yield and profitability. By utilizing Precision Agriculture techniques such as GPS soil sampling, remote sensing, variable rate technology (VRT), and Geographic Information Systems (GIS), farmers can make more informed decisions about when and where to plant, fertilize, and irrigate. These advanced technologies are capable of reducing waste, conserving resources, and minimizing the environmental impact of farming, thus contributing to sustainable agriculture. Additionally, with the advent of smart devices and Internet of Things (IoT) in agriculture, real-time monitoring of crop and soil health has become possible, leading to improved crop management and forecasting. As a result, the increasing efficiency, cost-effectiveness, and environmental sustainability offered by automated farming and precision agriculture are anticipated to drive their acceptance and demand worldwide, revolutionizing the agricultural industry on a global scale.

Key Market Challenges

High Initial Investment

Precision agriculture, one of the megatrends in the global agricultural landscape,

represents a new approach to plant cultivation. Utilizing advanced technologies such as drones, remote sensing, and GPS, it seeks to optimize resource use, increasing crop yields, and diminishing environmental impact. However, the high initial investment required can serve as a significant barrier to its global adoption. The cost of Precision Agriculture technologies, along with the necessary infrastructural changes, can be prohibitive, especially for small to medium-scale farmers who constitute a large segment of the global agricultural sector. This financial constraint is even more pronounced in developing countries, where farmers often lack access to credit or other funding resources. Additionally, the return on investment (ROI) from Precision Agriculture is not immediate and requires a longer-term perspective. This aspect can discourage those seeking quick financial gains or those operating on tight margins. Consequently, while the benefits of precision agriculture are apparent, the high initial investment and long-term ROI may decrease its demand globally, particularly amongst small-scale farmers and in resource-limited regions.

Lack of Necessary Infrastructure

Precision Agriculture (PA) is a farming management approach that leverages advanced technology to enhance crop yield and profitability while lowering the overall level of inputs necessary. However, the lack of necessary infrastructure, particularly in developing economies, is expected to reduce the global demand for precision agriculture. Many rural areas still lack the fundamental infrastructure needed to use precision agriculture technologies effectively, such as reliable electricity supply, high-speed internet, and access to modern farming equipment. Without these foundations, the successful implementation of PA becomes extremely challenging. Additionally, the high costs associated with establishing this infrastructure can be prohibitive, particularly in regions where agriculture operates on very slim margins. The lack of skilled workforce to operate and maintain these sophisticated technologies is another significant hurdle. Furthermore, the absence of specific regulatory policies supporting the adoption of such technologies can also deter farmers from making these investments. Thus, until these infrastructural and policy issues are effectively addressed, the adoption of Precision Agriculture is likely to be restrained, reducing its demand on a global scale.

Key Market Trends

Growing Popularity of Unmanned Aerial Vehicles (UAVs) Or Drones In Agricultural Operations

The growing popularity of Unmanned Aerial Vehicles (UAVs), or drones, in agricultural operations is poised to propel the global demand for precision agriculture. This technology-centric approach to farming, which leverages data and analytics, is being transformed by the introduction of UAVs. These drones, equipped with advanced sensors and imaging capabilities, can provide detailed and accurate real-time data about the condition of crops, soil, and weather. They help farmers to monitor crop health, detect diseases or pests, assess soil moisture levels, and even assist in the precise application of fertilizers or pesticides, thereby reducing wastage and enhancing crop yield. The ability to make informed decisions based on accurate, real-time data significantly increases efficiency, productivity, and sustainability in agriculture, making it an attractive proposition for farmers globally. Furthermore, as environmental sustainability becomes a pressing concern, the need for efficient resource management in agriculture intensifies, reinforcing the demand for Precision Agriculture tools like drones. With the continual advancements in drone technology and a growing acknowledgment of its benefits, the role of drones in global precision agriculture is expected to increase substantially.

Emergence of Precision Livestock Farming

Precision Livestock Farming (PLF) is an emerging technological innovation that is projected to lead to a surge in global demand for Precision Agriculture (PA). PLF harnesses the power of cutting-edge technologies such as Artificial Intelligence (AI), the Internet of Things (IoT), and Big Data analytics to manage and monitor livestock health and productivity. This methodical, data-driven approach allows farmers to make precise, timely decisions that enhance livestock productivity, welfare, and sustainability. Moreover, implementing PLF leads to increased demand for PA, because the principles and technologies used in precision livestock are deeply intertwined with those in PA. Both methodologies share a common goal of optimizing productivity while minimizing environmental impact through precise monitoring and management. Additionally, the adoption of PLF encourages the use of PA technologies such as Geographic Information Systems (GIS) and Remote Sensing (RS), which are crucial tools for monitoring and managing crops. Thus, the rise of PLF directly fuels the growth of PA, with both sectors mutually benefiting from advancements in technology and data science. The global trend toward sustainable farming practices is only expected to accelerate this growth, cementing the role of precision agriculture in the future of farming.

Segmental Insights

Component Insights

Based on the Component, the hardware segment accounted for the largest revenue share in 2022 and is projected to maintain market dominance throughout the forecast period. Within the hardware segment, there are several subcategories, including automation and control systems, sensing devices, antennas, and access points. These hardware components, such as automation and control systems, sensing devices, and drones, play a crucial role in supporting farmers. For example, the GIS guidance system provides growers with valuable visualization of agricultural workflows and the environment. Additionally, VRT technology aids farmers in identifying areas that require targeted pesticide and seed application, ensuring equitable distribution across the field.

The software segment is segmented into web-based and cloud-based Precision Agriculture solutions. Cloud computing offers shared networks, servers, and storage devices, effectively eliminating the high costs associated with hardware and software infrastructure maintenance. Consequently, the software segment is expected to exhibit a robust CAGR during the forecast period. Predictive analytics software is employed to provide farmers with guidance on crop rotation, soil management, optimal planting times, and harvesting times.

Application Insights

Based on the Application, the yield monitoring segment, which accounted for the largest revenue share in 2022, is projected to maintain its dominant position throughout the forecast period. This segment plays a crucial role in assisting farmers in making informed decisions about their fields. It is further divided into two categories: on-farm yield monitoring and off-farm yield monitoring. On-farm yield monitoring enables farmers to access real-time information during harvest and create a comprehensive historical spatial database. This not only facilitates equitable negotiations with landlords but also ensures documentation of environmental compliance and establishes track records for food safety. The on-farm yield monitoring segment is anticipated to hold the largest share of the Precision Agriculture market due to its numerous benefits and practical applications in the agricultural industry.

Regional Insights

North America accounted for the largest revenue share in 2022. The region has established itself as an early adopter of cutting-edge technologies, paving the way for advancements across various industries. The success can be attributed to a

combination of factors, including increasing government initiatives that support the adoption of modern agriculture technologies and a well-developed infrastructure that facilitates seamless integration.

For instance, the National Institute of Food and Agriculture (NIFA), a key division of the U.S. Department of Agriculture, plays a crucial role in promoting awareness among farmers. Through their geospatial, sensor, and precision technology programs, NIFA collaborates with Land-Grant universities to empower farmers with robust sensors, software, and instrumentation. This enables them to effectively model, observe, and analyze a wide range of complex biological materials and processes, ultimately optimizing their agricultural practices.

Moreover, in May 2022, the Government of Canada made a significant investment of USD 4,41,917.5 to develop an integrated system specifically tailored for precision fruit tree farming. This forward-thinking initiative not only aims to address the emerging challenges in Canada's apple industry but also seeks to foster sustainable solutions for long-term growth and prosperity. The continuous commitment to technological advancements and sustainable practices positions North America as a frontrunner in the global market, setting the stage for further growth and innovation in the years to come.

Key Market Players

Ag Leader Technology

AgJunction, Inc.

CropMetrics LLC

Trimble, Inc.

Raven Industries Inc.

Deere and Company

Topcon Corporation

AgEagle Aerial Systems Inc.

Farmers Edge Inc.

Grownetics, Inc.

Report Scope:

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

Precision Agriculture Market, By Technology:

Guidance Systems

Remote Sensing

Variable Rate Technologies

Precision Agriculture Market, By Component:

Software

Hardware

Precision Agriculture Market, By Application:

Yield Monitoring

Field Mapping

Others

Precision Agriculture 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Precision Agriculture Market.

Available Customizations:

Global Precision Agriculture 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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