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Smart Harvest Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Component (Hardware {Automation & Control Systems, Sensors, Imaging Systems, Harvesting Robots} and Software) By Site of Operation (On-Field, Greenhouse, Indoor) By Crop Type (Fruits and Vegetables), By Region and Competition

https://marketpublishers.com/r/SB53D6A37260EN.html
Date: November 2023
Pages: 190
Price: US$ 4,900.00 (Single User License)
ID: SB53D6A37260EN

Abstracts

Global Smart Harvest Market has valued at USD 14.78 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.55% through 2028. Harvesting is not only a critical component of every agricultural operation, but it also plays a vital role in determining the overall profitability of the process. Timely and efficient harvesting methods have become increasingly important, particularly in the realm of fruit and vegetable production. With the advent of smart harvesting, the game has changed. Smart harvesting involves the utilization of self-driving farming robots that autonomously pick vegetables and fruits, requiring minimal to no human intervention. These robots leverage advanced technologies such as GPS, cloud computer vision, satellite photos, artificial intelligence (AI), machine learning (MI), big data, and the Internet of Things (IoT) to revolutionize agricultural productivity. By integrating these smart technologies seamlessly into the harvesting process, farmers can experience improved yields, reduce labor costs, and enhance overall efficiency, ultimately leading to greater profitability in the agricultural industry.

Key Market Drivers

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Advancements in Artificial Intelligence

Advancements in Artificial Intelligence (AI) are creating a transformative effect on the global agriculture sector, particularly in the domain of smart harvesting. The incorporation of AI enables the automation of harvesting processes, contributing to increased efficiency, productivity, and cost-effectiveness. AI-powered robotic harvesters are capable of identifying ripe crops based on color, size, and shape. They delicately harvest these crops, reducing the risk of damage and loss. By leveraging machine learning algorithms, these systems continually improve their performance over time, enhancing accuracy and reducing harvesting time. AI also assists in predictive analysis, enabling farmers to forecast crop yield based on weather patterns, soil conditions, and historical data. This allows for strategic planning of harvesting schedules, further optimizing crop yield. Furthermore, AI in conjunction with IoT devices can provide real-time field data, enabling farmers to make informed decisions and take immediate action when required. Given these significant benefits, the demand for smart harvesting solutions is expected to surge globally. The increasing need for sustainable farming practices to meet the growing food demand of the global population, coupled with a reduction in agricultural labor, is further fueling this trend. In conclusion, advancements in AI technology are expected to drive the global demand for smart harvesting solutions, revolutionizing the agriculture sector and paving the way for a more efficient and sustainable future.

Increased Demand for Sustainable Farming

The global demand for sustainable farming is becoming increasingly predominant, which in turn, is expected to amplify the demand for Smart Harvest technologies worldwide. Growing consumer consciousness about the environment and food safety, coupled with the desire to achieve higher crop yields without exacerbating the carbon footprint or depleting natural resources, have made sustainable farming practices an emergent necessity. Smart Harvest technologies have emerged as a viable solution to meet these expectations. They integrate advanced robotics, artificial intelligence, and data analytics to automate harvesting processes, subsequently reducing wastage, improving crop quality, and enhancing overall farm productivity. In addition, the implementation of these technologies aids in conserving water, reducing the use of harmful pesticides, and promoting soil health, aligning well with the principles of sustainable farming. These benefits are driving farmers, particularly those in developed economies, to adopt smart harvesting solutions, thereby propelling the market growth. As global governments increasingly embrace and promote environmentally-friendly agricultural policies, the trend towards sustainable farming is expected to prevail, further

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fueling the demand for Smart Harvest technologies.

Rise in Need for Consistent Production

The global demand for consistent and sustainable agricultural produce is witnessing an unpreceded surge. This is primarily due to the ever-increasing population, coupled with the escalating need for food security and sustainable farming practices. Smart Harvest technologies, with their intelligent and automated systems, are stepping up to meet this demand. They offer solutions such as robotic harvesting, advanced horticultural lighting, and precise data analytics, significantly enhancing crop yields and ensuring year-round produce availability. The rising need for consistent production is driving the adoption of these technologies worldwide. Agriculture industries across the globe are leveraging these advanced technologies to increase productivity, minimize crop loss, and reduce labor costs. Additionally, the use of Smart Harvest technologies mitigates the impact of unpredictable weather patterns on crop production, ensuring consistent yields. The technology also promotes sustainable farming by optimizing water and energy usage, further contributing to its growing acceptance. As such, the rise in the need for consistent production is expected to significantly boost the demand for Smart Harvest technologies globally, transforming agricultural practices and propelling the sector towards a more sustainable and secure future.

Internet of Things (IoT) integration in Farming Practices

The integration of Internet of Things (IoT) in farming practices is set to escalate the global demand for smart harvesting. IoT-powered smart farming equipment, such as autonomous tractors and drones equipped with advanced sensors, provides farmers with real-time data about crop health, soil moisture, and weather conditions. This facilitates precise application of fertilizers and pesticides, timely irrigation, and optimal harvesting time, reducing waste and maximizing yield. Moreover, with IoT, farmers can remotely monitor and control farm operations, enhancing efficiency and productivity. The integration of IoT in smart harvesting also promotes sustainable farming practices by minimizing the use of water, energy, and chemicals, and reducing the carbon footprint. The smart harvest market's growth is also propelled by the increasing global population and the corresponding need for high crop productivity to ensure food security. Therefore, the amalgamation of IoT in farming practices is not only revolutionizing agricultural methods but also playing a pivotal role in boosting the demand for smart harvesting on a global scale. The potential of IoT in transforming farming practices and the growing recognition of its benefits among farmers are expected to continue driving the smart harvest market in the coming years.

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Key Market Challenges

High Initial Investments

High initial investments are a significant barrier to the widespread adoption of Smart Harvest technologies globally. The procurement and installation of these advanced systems require substantial capital, which is often beyond the reach of small to medium scale farmers. These advanced systems incorporate several components such as automation and robotic systems, sensors, GPS, climate control systems, and cutting-edge software solutions, each contributing to the overall cost. Furthermore, the need for skilled personnel to operate and maintain these systems adds to the expenses, making it economically unfeasible for many growers. When viewed in light of the thin profit margins in agriculture, these high initial costs may deter farmers from investing in Smart Harvest technologies. Moreover, the return on investment (ROI) for these systems is not immediate and requires a longer timeframe, placing an additional financial burden on farmers. Consequently, this high capital expenditure is anticipated to negatively impact the global demand for Smart Harvest systems. However, governmental support in the form of subsidies and grants, along with advancements reducing the cost of these technologies, may counterbalance some of these financial hurdles in the future.

Lack of Technical Expertise

Despite the advancements in agriculture via smart harvest technologies, their adoption often faces significant obstacles due to the lack of technical expertise among farmers globally. Many small-scale and even large-scale farmers, particularly in developing countries, lack the necessary skills and training to operate advanced machinery and systems associated with smart harvesting. These technologies, such as autonomous machinery, IoT-based sensors, and data analytics software, require a reasonable level of technological knowledge and understanding for effective utilization. This expertise gap is expected to dampen the global demand for smart harvest technologies. Also, the cost and effort involved in training to use such high-end technologies may deter farmers who are used to traditional farming methods. Furthermore, the possibility of technical issues and breakdowns, combined with the potential scarcity of qualified maintenance and repair services in rural areas, can discourage farmers from investing in and using smart harvest solutions. Thus, a lack of technical expertise could slow down the widespread adoption of smart harvest technologies, reducing their global market

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demand.

Key Market Trends

Rising Labor Costs

The escalating labor costs worldwide are expected to dramatically boost demand for smart harvesting technology. Agriculture, being labor-intensive, is significantly impacted by the rising expense of hiring skilled workers. High labor costs are increasingly pushing farmers and commercial growers to look for more efficient and cost-effective alternatives, which smart harvesting technology promisingly provides. Smart Harvest systems, featuring advanced robotics, AI, and IoT-based technologies, are capable of performing complex agricultural tasks such as picking, sorting, and packing with precision and speed that far surpass human capabilities. They drastically reduce the reliance on human labor, mitigating the financial burden posed by escalating labor costs. Additionally, these systems can operate continuously without the constraints of human work schedules, further enhancing productivity and efficiency. More importantly, smart harvest technologies provide consistent quality, reducing wastage, and enhancing overall yield, thus making it an attractive investment despite the upfront cost. With the persistent surge in labor costs, the adoption of smart harvest technologies is anticipated to exponentially increase, thereby revolutionizing agricultural practices across the globe.

Increasing Urbanization

The ongoing surge in global urbanization is expected to exponentially increase the demand for Smart Harvest technologies. As cities expand and populations become more concentrated, the necessity to efficiently utilize available agricultural resources becomes paramount. Smart Harvest technologies offer a solution by providing advanced, automated, and precise harvesting methods that maximize yields and minimize waste. These technologies, such as robotics, artificial intelligence, and machine learning, can accurately determine the optimal harvest time and execute the task with precision, thereby reducing labor costs and increasing productivity. Furthermore, they contribute to the sustainability of urban agriculture by minimizing environmental degradation and promoting resource conservation. The drive towards urbanization also sees a rise in vertical farming and indoor gardening, both of which benefit immensely from smart harvesting techniques. Additionally, the urban populace, known for its tech-savvy nature and interest in sustainable and organic foods, represents an ideal market for Smart Harvest technologies. Consequently, as urbanization progresses across the globe, the demand for smarter, more efficient, and

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more sustainable harvesting technologies is set to rise correspondingly.

Segmental Insights

Component Insights

Based on the Component, the Global Smart Harvest Market is currently experiencing significant growth in both the hardware and software sectors, with the hardware segment taking the lead. The hardware involved in smart harvest includes advanced automated harvesting robots, cutting-edge drones equipped with precision sensors, state-of-the-art RFID tags, and highly accurate GPS systems. These innovative technologies play a vital role in facilitating precision agriculture by ensuring seamless operations and optimizing yield. The automated harvesting robots, with their advanced capabilities, perform tasks such as crop monitoring, selective harvesting, and sorting, thereby reducing labor costs and increasing overall efficiency. The drones, equipped with high-resolution sensors, provide real-time data on crop health, soil conditions, and pest infestations, enabling farmers to make informed decisions and take timely action. The RFID tags are used for tracking and tracing harvested crops, ensuring quality control and streamlining supply chain management. Additionally, the GPS systems enable precise mapping and navigation, optimizing the use of resources and reducing environmental impact.

Smart harvest software complements the hardware by providing advanced data analysis and predictive analytics for weather conditions. This enables farmers to anticipate and mitigate potential risks, optimize irrigation and fertilization schedules, and make informed decisions regarding harvesting timing. Real-time monitoring capabilities offered by the software allow farmers to remotely monitor and control various parameters, such as temperature, humidity, and soil moisture, ensuring optimal conditions for crop growth. It is worth noting that while the hardware segment currently dominates the market share due to its indispensable role in precision agriculture, the initial investment cost may be higher. However, the long-term benefits, including increased yield, reduced waste, and improved operational efficiency, make it a worthwhile investment for farmers who are looking to stay ahead in the ever-evolving agricultural landscape.

Site of Operation Insights

Based on the Site of Operation, the On-Field segment is dominating the Global Smart Harvest Market. This can be attributed to the increasing integration of advanced

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technologies - such as Internet of Things (IoT), Artificial Intelligence (AI), and machine learning - into on-field farming practices. These technologies are revolutionizing the traditional farming methods, making them more efficient and productive. Advancements in robotics and autonomous machinery are further contributing to the market dominance of the On-Field segment. From automated tractors that plow fields to drones that monitor crop health, smart harvesting technologies are becoming an integral part of on-field farming operations.

Regional Insights

Europe has witnessed a significant adoption of smart harvesting mechanisms in recent years. Farmers in this region are motivated by strong incentives and receive financial assistance from the government to embrace these technologically driven harvesting systems. Moreover, Europe is a major hub for vendors and manufacturers of smart harvest systems.

In the Asia-Pacific (APAC) region, there has been a gradual increase in the implementation of smart harvesting mechanisms, driven by the growing awareness among young farmers and aspiring Agri-entrepreneurs about the benefits of these smart systems. The increasing population and demand for a wide variety of fruits and vegetables further encourage farmers in the APAC region to adopt this mechanism. Governments in these countries allocate more funds to the agriculture sector each year through budgetary policies, providing small-scale farmers with loans and subsidies to leverage advancing technological mechanisms. Additionally, both public and private sectors are making increasing investments in smart harvesting technologies and devices, fueling the rapid growth of APAC countries.

Key Market Players

1. Robert Bosch GmbH

2. Deere & Company

3. Smart Harvest Ltd.

4. Dogtooth Technologies Limited

5. Harvest Automation, Inc.

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6. Root AI, Inc.

7. Iron Ox, Inc.

8. FFRobotics Ltd.

9. Vision Robotics Corp.

10. Harvest CROO, LLC

Report Scope:

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

Smart Harvest Market, By Component:

Hardware

Software

Smart Harvest Market, By Site of Operation:

On-Field

Greenhouse

Indoor

Smart Harvest Market, By Crop Type:

Fruits

Vegetables

Smart Harvest Market, By Region:

North America

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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

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South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Smart Harvest Market.

Available Customizations:

Global Smart Harvest 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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Contents

1. PRODUCT OVERVIEW

1.1. Market Definition
1.2. Scope of the Market
  1.2.1. Markets Covered
  1.2.2. Years Considered for Study
  1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

2.1. Objective of the Study
2.2. Baseline Methodology
2.3. Key Industry Partners
2.4. Major Association and Secondary Sources
2.5. Forecasting Methodology
2.6. Data Triangulation & Validations
2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

3.1. Overview of the Market
3.2. Overview of Key Market Segmentations
3.3. Overview of Key Market Players
3.4. Overview of Key Regions/Countries
3.5. Overview of Market Drivers, Challenges, Trends
3.6. Voice of Customer

4. GLOBAL SMART HARVEST MARKET OUTLOOK

4.1. Market Size & Forecast
  4.1.1. By Value
4.2. Market Share & Forecast
  4.2.1. By Component (Hardware and Software)
    4.2.1.1. By Hardware {Automation & Control Systems, Sensors, Imaging Systems, Harvesting Robots}
  4.2.2. By Site of Operation (On-Field, Greenhouse, Indoor)
  4.2.3. By Crop Type (Fruits and Vegetables)

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4.2.4. By Region
4.2.5. By Company (2022)
4.3. Market Map

5. NORTH AMERICA SMART HARVEST MARKET OUTLOOK

5.1. Market Size & Forecast
5.1.1. By Value
5.2. Market Share & Forecast
5.2.1. By Component
5.2.2. By Site of Operation
5.2.3. By Crop Type
5.2.4. By Country
5.3. North America: Country Analysis
5.3.1. United States Smart Harvest Market Outlook
5.3.1.1. Market Size & Forecast
5.3.1.1.1. By Value
5.3.1.2. Market Share & Forecast
5.3.1.2.1. By Component
5.3.1.2.2. By Site of Operation
5.3.1.2.3. By Crop Type
5.3.2. Canada Smart Harvest Market Outlook
5.3.2.1. Market Size & Forecast
5.3.2.1.1. By Value
5.3.2.2. Market Share & Forecast
5.3.2.2.1. By Component
5.3.2.2.2. By Site of Operation
5.3.2.2.3. By Crop Type
5.3.3. Mexico Smart Harvest Market Outlook
5.3.3.1. Market Size & Forecast
5.3.3.1.1. By Value
5.3.3.2. Market Share & Forecast
5.3.3.2.1. By Component
5.3.3.2.2. By Site of Operation
5.3.3.2.3. By Crop Type

6. EUROPE SMART HARVEST MARKET OUTLOOK

6.1. Market Size & Forecast

+44 20 8123 2220
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6.1.1. By Value
6.2. Market Share & Forecast
6.2.1. By Component
6.2.2. By Site of Operation
6.2.3. By Crop Type
6.2.4. By Country
6.3. Europe: Country Analysis
6.3.1. Germany Smart Harvest Market Outlook
6.3.1.1. Market Size & Forecast
6.3.1.1.1. By Value
6.3.1.2. Market Share & Forecast
6.3.1.2.1. By Component
6.3.1.2.2. By Site of Operation
6.3.1.2.3. By Crop Type
6.3.2. United Kingdom Smart Harvest Market Outlook
6.3.2.1. Market Size & Forecast
6.3.2.1.1. By Value
6.3.2.2. Market Share & Forecast
6.3.2.2.1. By Component
6.3.2.2.2. By Site of Operation
6.3.2.2.3. By Crop Type
6.3.3. Italy Smart Harvest Market Outlook
6.3.3.1. Market Size & Forecast
6.3.3.1.1. By Value
6.3.3.2. Market Share & Forecasty
6.3.3.2.1. By Component
6.3.3.2.2. By Site of Operation
6.3.3.2.3. By Crop Type
6.3.4. France Smart Harvest Market Outlook
6.3.4.1. Market Size & Forecast
6.3.4.1.1. By Value
6.3.4.2. Market Share & Forecast
6.3.4.2.1. By Component
6.3.4.2.2. By Site of Operation
6.3.4.2.3. By Crop Type
6.3.5. Spain Smart Harvest Market Outlook
6.3.5.1. Market Size & Forecast
6.3.5.1.1. By Value
6.3.5.2. Market Share & Forecast

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6.3.5.2.1. By Component
6.3.5.2.2. By Site of Operation
6.3.5.2.3. By Crop Type

7. ASIA-PACIFIC SMART HARVEST MARKET OUTLOOK

7.1. Market Size & Forecast
7.1.1. By Value
7.2. Market Share & Forecast
7.2.1. By Component
7.2.2. By Site of Operation
7.2.3. By Crop Type
7.2.4. By Country
7.3. Asia-Pacific: Country Analysis
7.3.1. China Smart Harvest Market Outlook
7.3.1.1. Market Size & Forecast
7.3.1.1.1. By Value
7.3.1.2. Market Share & Forecast
7.3.1.2.1. By Component
7.3.1.2.2. By Site of Operation
7.3.1.2.3. By Crop Type
7.3.2. India Smart Harvest Market Outlook
7.3.2.1. Market Size & Forecast
7.3.2.1.1. By Value
7.3.2.2. Market Share & Forecast
7.3.2.2.1. By Component
7.3.2.2.2. By Site of Operation
7.3.2.2.3. By Crop Type
7.3.3. Japan Smart Harvest Market Outlook
7.3.3.1. Market Size & Forecast
7.3.3.1.1. By Value
7.3.3.2. Market Share & Forecast
7.3.3.2.1. By Component
7.3.3.2.2. By Site of Operation
7.3.3.2.3. By Crop Type
7.3.4. South Korea Smart Harvest Market Outlook
7.3.4.1. Market Size & Forecast
7.3.4.1.1. By Value
7.3.4.2. Market Share & Forecast

+44 20 8123 2220
info@marketpublishers.com

7.3.4.2.1. By Component
7.3.4.2.2. By Site of Operation
7.3.4.2.3. By Crop Type
7.3.5. Australia Smart Harvest Market Outlook
7.3.5.1. Market Size & Forecast
7.3.5.1.1. By Value
7.3.5.2. Market Share & Forecast
7.3.5.2.1. By Component
7.3.5.2.2. By Site of Operation
7.3.5.2.3. By Crop Type

8. SOUTH AMERICA SMART HARVEST MARKET OUTLOOK

8.1. Market Size & Forecast
8.1.1. By Value
8.2. Market Share & Forecast
8.2.1. By Component
8.2.2. By Site of Operation
8.2.3. By Crop Type
8.2.4. By Country
8.3. South America: Country Analysis
8.3.1. Brazil Smart Harvest Market Outlook
8.3.1.1. Market Size & Forecast
8.3.1.1.1. By Value
8.3.1.2. Market Share & Forecast
8.3.1.2.1. By Component
8.3.1.2.2. By Site of Operation
8.3.1.2.3. By Crop Type
8.3.2. Argentina Smart Harvest Market Outlook
8.3.2.1. Market Size & Forecast
8.3.2.1.1. By Value
8.3.2.2. Market Share & Forecast
8.3.2.2.1. By Component
8.3.2.2.2. By Site of Operation
8.3.2.2.3. By Crop Type
8.3.3. Colombia Smart Harvest Market Outlook
8.3.3.1. Market Size & Forecast
8.3.3.1.1. By Value
8.3.3.2. Market Share & Forecast

+44 20 8123 2220
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8.3.3.2.1. By Component
8.3.3.2.2. By Site of Operation
8.3.3.2.3. By Crop Type

9. MIDDLE EAST AND AFRICA SMART HARVEST MARKET OUTLOOK

9.1. Market Size & Forecast
9.1.1. By Value
9.2. Market Share & Forecast
9.2.1. By Component
9.2.2. By Site of Operation
9.2.3. By Crop Type
9.2.4. By Country
9.3. MEA: Country Analysis
9.3.1. South Africa Smart Harvest Market Outlook
9.3.1.1. Market Size & Forecast
9.3.1.1.1. By Value
9.3.1.2. Market Share & Forecast
9.3.1.2.1. By Component
9.3.1.2.2. By Site of Operation
9.3.1.2.3. By Crop Type
9.3.2. Saudi Arabia Smart Harvest Market Outlook
9.3.2.1. Market Size & Forecast
9.3.2.1.1. By Value
9.3.2.2. Market Share & Forecast
9.3.2.2.1. By Component
9.3.2.2.2. By Site of Operation
9.3.2.2.3. By Crop Type
9.3.3. UAE Smart Harvest Market Outlook
9.3.3.1. Market Size & Forecast
9.3.3.1.1. By Value
9.3.3.2. Market Share & Forecast
9.3.3.2.1. By Component
9.3.3.2.2. By Site of Operation
9.3.3.2.3. By Crop Type
9.4. Drivers
9.5. Challenges

10. MARKET TRENDS & DEVELOPMENTS

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10.1. Recent Development
10.2. Mergers & Acquisitions
10.3. Product Launches

11. GLOBAL SMART HARVEST MARKET: SWOT ANALYSIS

12. PORTER'S FIVE FORCES ANALYSIS

12.1. Competition in the Industry
12.2. Potential of New Entrants
12.3. Power of Suppliers
12.4. Power of Customers
12.5. Threat of Substitute Products

13. COMPETITIVE LANDSCAPE

13.1. Robert Bosch GmbH
  13.1.1. Business Overview
  13.1.2. Service Offerings
  13.1.3. Recent Developments
  13.1.4. Key Personnel
  13.1.5. SWOT Analysis
13.2. Deere & Company
13.3. Smart Harvest Ltd.
13.4. Dogtooth Technologies Limited
13.5. Harvest Automation, Inc.
13.6. Root AI, Inc.
13.7. Iron Ox, Inc.
13.8. FFRobotics Ltd.
13.9. Vision Robotics Corp.
13.10. Harvest CROO, LLC

14. STRATEGIC RECOMMENDATIONS

15. ABOUT US & DISCLAIMER

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