

# **Smart Specialty Crop Farming Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Fruits and Tree Nuts, Vegetables, Culinary Herbs and Spices, Medicinal Herbs, Others), By Product Type (Open Field Hardware, Controlled Environment Agriculture (CEA) Systems Hardware, Software), By Region and Competition, 2019-2029F**

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## **Abstracts**

Global Smart Specialty Crop Farming Market was valued at USD 6.82 Billion in 2023 and is expected to reach USD 12.64 Billion by 2029 with a CAGR of 11.01 % during the forecast period.

The Global Smart Specialty Crop Farming Market is experiencing significant growth driven by advancements in technology and a rising demand for efficient agricultural practices. Smart specialty crop farming integrates various technologies such as Internet of Things (IoT), artificial intelligence (AI), and robotics to optimize farming operations, enhance crop yield, and improve resource management. This market focuses on specialty crops, which include high-value and niche crops like fruits, vegetables, herbs, and ornamental plants that often require precise cultivation techniques and conditions. According to the United States Department of Agriculture's August 2023 report on Technology Use (Farm Computer Usage and Ownership), 32 percent of farms used the internet to procure agricultural inputs in 2023, representing a 3 percent increase from 2021. Additionally, 23 percent of farms utilized the internet for marketing agricultural activities, showing a 2 percent increase from the previous year.

Key technologies in smart farming include precision agriculture tools, which utilize sensors and data analytics to monitor soil health, weather conditions, and crop performance in real time. This enables farmers to make informed decisions about irrigation, fertilization, and pest control, thereby reducing waste and increasing productivity. The adoption of automated systems, such as drones and robotic harvesters, is revolutionizing crop management and harvesting processes, improving efficiency and reducing labor costs. The growing emphasis on sustainability and the need for environmentally friendly farming practices are also contributing to the market's expansion. As climate change and resource scarcity become pressing issues, smart specialty crop farming offers solutions that enhance resilience and adapt to changing conditions. Advancements in genetic engineering and biotech innovations are enabling the development of crop varieties that are more resilient to pests and diseases.

## Key Market Drivers

### Technological Advancements in IoT and AI

Technological advancements in Internet of Things (IoT) and Artificial Intelligence (AI) are driving significant progress in the Global Smart Specialty Crop Farming Market. IoT technologies, encompassing sophisticated sensors and robust connectivity solutions, facilitate real-time monitoring of critical agricultural parameters such as crop conditions, soil health, and environmental factors. These sensors collect a wealth of data on variables including soil moisture levels, nutrient content, and weather conditions. This extensive data is subsequently analyzed through AI algorithms, which enable farmers to optimize their farming practices with remarkable precision.

AI-powered predictive analytics play a crucial role in transforming farming operations by forecasting crop needs and identifying potential issues before they become critical. By leveraging AI, farmers can gain insights into optimal planting times, irrigation schedules, and nutrient applications, thus enhancing their ability to make informed, data-driven decisions. This proactive approach not only boosts operational efficiency but also minimizes resource wastage, contributing to more sustainable farming practices.

The integration of IoT and AI technologies enhances various aspects of crop management. For instance, AI-driven models can predict pest infestations or disease outbreaks based on historical data and real-time sensor inputs, allowing for timely interventions. The continuous evolution of these technologies—marked by decreasing costs and greater accessibility—further accelerates the adoption of smart farming solutions. This progression enables farmers to achieve higher precision in their

operations, resulting in improved crop yield, quality, and overall profitability. As IoT and AI technologies advance, they continue to reshape the landscape of specialty crop production. The ability to harness and analyze large volumes of data effectively empowers farmers to make strategic decisions, ensuring that their farming practices are both efficient and sustainable. This ongoing technological evolution promises to drive further growth in the smart specialty crop farming market, fostering innovations that enhance productivity and sustainability in agriculture.

### Rising Demand for Specialty Crops

The rising global demand for specialty crops is a pivotal factor driving growth in the smart specialty crop farming market. Specialty crops, which include high-value fruits, vegetables, herbs, and ornamental plants, are increasingly favored for their distinctive flavors, nutritional benefits, and aesthetic appeal. This surge in consumer interest is creating significant market opportunities as populations grow and dietary preferences evolve toward healthier and more diverse food choices. As the global population expands and consumer tastes shift, the need for innovative and efficient farming practices has become more critical. Specialty crops require precise cultivation techniques to thrive, and smart farming technologies are uniquely equipped to meet these needs. By incorporating precision agriculture tools and advanced analytics, smart farming solutions enable farmers to optimize growing conditions for specialty crops. These technologies facilitate real-time monitoring and adjustment of factors such as soil moisture, nutrient levels, and environmental conditions, ensuring that crops receive optimal care.

Smart specialty crop farming practices help farmers manage resources more effectively, reducing waste and increasing productivity. This efficiency is crucial as the demand for specialty crops intensifies, requiring farmers to enhance crop quality while adhering to sustainability standards. The integration of technology in farming practices not only meets consumer demand but also supports the expanding food industry, which increasingly values the unique qualities and benefits of specialty crops.

The popularity of specialty crops extends beyond domestic markets, reaching international consumers who seek diverse and high-quality produce. This global appeal further drives the need for advanced farming methods that can ensure consistent supply and maintain high standards of crop quality. As the smart specialty crop farming market continues to grow, it is poised to play a crucial role in meeting the rising demand for these sought-after crops, contributing to both economic growth and advancements in agricultural practices.

## Emphasis on Sustainable Agriculture

The global emphasis on sustainable agriculture is increasingly influencing the adoption of smart specialty crop farming practices. As concerns about environmental degradation and climate change intensify, there is a growing imperative for farming methods that mitigate environmental impacts and promote resource conservation. Smart farming technologies are at the forefront of this movement, offering solutions that align with sustainability goals while enhancing agricultural efficiency. One of the key ways smart farming technologies support sustainability is through the optimization of resource use. Precision irrigation systems, for instance, are designed to deliver water directly to the crop roots in the exact amounts needed. This targeted approach reduces overall water consumption, minimizes runoff, and decreases the risk of soil erosion. By conserving water and preventing its wastage, precision irrigation contributes significantly to sustainable farming practices.

Data-driven approaches to pest and nutrient management play a crucial role in reducing the reliance on chemical inputs. Advanced analytics and monitoring tools enable farmers to apply fertilizers and pesticides more judiciously, based on real-time data and predictive models. This not only helps in minimizing the quantity of chemicals used but also improves the health of the soil and surrounding ecosystems. By reducing chemical runoff and preventing over-application, these technologies contribute to lower pollution levels and healthier agricultural environments.

The shift towards sustainable agriculture is also driven by regulatory pressures and evolving consumer preferences. Regulatory bodies are increasingly enforcing standards that require environmentally friendly practices, and consumers are demanding products that are produced with minimal environmental impact. Smart specialty crop farming technologies meet these expectations by promoting eco-friendly practices and improving the overall sustainability of farming operations. The emphasis on sustainable agriculture is a significant driver behind the adoption of smart specialty crop farming. By optimizing resource use and reducing environmental impact, these technologies align with both regulatory requirements and consumer demands for eco-friendly practices. This alignment not only supports the environment but also enhances the long-term viability of agricultural practices.

## Key Market Challenges

### High Initial Investment Costs

One of the major challenges facing the Global Smart Specialty Crop Farming Market is the high initial investment required for adopting advanced technologies. Integrating smart farming solutions, such as IoT devices, AI-driven analytics, automated machinery, and precision agriculture tools, demands a substantial capital expenditure. These technologies typically come with significant upfront costs for purchasing equipment, installing systems, and maintaining infrastructure, which can be particularly prohibitive for small to medium-sized farms. The cost of training personnel to effectively operate and maintain these advanced systems adds another layer of financial burden. While the long-term benefits, such as increased operational efficiency and higher crop yields, can potentially offset these initial costs, the financial challenge remains substantial. Many farmers face difficulties in securing the necessary funds to invest in these technologies. To mitigate this barrier, access to funding options is crucial. Government subsidies, grants, and financing programs can play a pivotal role in alleviating the financial strain and facilitating the adoption of smart farming practices. Without adequate financial support, the widespread implementation of smart technologies in specialty crop farming may be constrained, potentially limiting market growth and innovation. Thus, addressing the financial challenges associated with technology adoption is essential for advancing the smart specialty crop farming sector.

#### Limited Access to High-Speed Internet in Rural Areas

Limited access to high-speed internet in rural areas presents a significant challenge for the Global Smart Specialty Crop Farming Market. Many smart farming technologies, including IoT sensors, data analytics platforms, and remote monitoring systems, depend on reliable and fast internet connectivity to operate effectively. In rural and remote regions, where specialty crops are frequently cultivated, high-speed internet access can be scarce or non-existent. This lack of connectivity severely hampers the deployment and functionality of these advanced technologies, thereby reducing their effectiveness and constraining their adoption.

Farmers in such areas often struggle with accessing real-time data, receiving timely updates, and utilizing cloud-based applications that are critical for optimizing crop management and operations. To address this challenge, substantial efforts are required to expand broadband infrastructure and enhance internet connectivity in rural locales. Government initiatives, including funding programs and regulatory support, alongside partnerships with telecommunications companies, are essential for driving improvements in rural internet access. Investments in rural internet infrastructure can bridge the connectivity gap and support the integration of smart technologies in

specialty crop farming. Ensuring equitable access to high-speed internet is crucial for enabling farmers to leverage advanced technologies, thereby fostering the growth of the smart specialty crop farming market and promoting more efficient and productive agricultural practices.

## Key Market Trends

### Increased Investment in Agri-Tech Innovations

Increased investment in agri-tech innovations is significantly propelling growth in the Global Smart Specialty Crop Farming Market. This surge in funding, sourced from venture capital, government grants, and private sector contributions, is driving the advancement and commercialization of groundbreaking agricultural technologies. The substantial financial influx supports extensive research and development efforts, leading to the emergence of advanced tools and solutions tailored specifically for specialty crop farming. Venture capital plays a crucial role by providing the necessary capital for startups and established companies focused on developing innovative agricultural technologies. This financial backing enables the creation and refinement of cutting-edge tools such as autonomous tractors, which can perform complex tasks with minimal human intervention, and drone-based monitoring systems, which offer real-time aerial insights into crop health and field conditions. These technologies streamline farming operations, increase efficiency, and contribute to enhanced crop management practices.

Government funding further accelerates the development of agri-tech innovations by supporting research initiatives and subsidizing the adoption of new technologies. This support often includes grants for projects that aim to improve sustainability, productivity, and resource management in agriculture. By fostering an environment conducive to innovation, government funding ensures that advancements in agricultural technology are continually integrated into farming practices. Private sector investments also play a significant role, particularly in enhancing technology infrastructure. Investments in high-speed internet and sophisticated data management systems are crucial for the effective implementation of smart farming solutions. These technologies enable seamless data collection, processing, and analysis, allowing farmers to make informed decisions based on comprehensive and real-time information.

The ongoing financial support for agri-tech innovations ensures that the development and availability of state-of-the-art solutions continue to advance. As a result, specialty crop farmers benefit from enhanced tools and technologies that drive market growth,

improve farming practices, and contribute to the overall efficiency and productivity of specialty crop farming. This dynamic investment landscape is a key driver in shaping the future of smart specialty crop farming.

### Adoption of Automation and Robotics

The adoption of automation and robotics is fundamentally transforming the Global Smart Specialty Crop Farming Market, driving significant improvements in efficiency and productivity. Automated systems, which include robotic harvesters, planting machines, and drones, are increasingly being integrated into farming practices to streamline operations and enhance overall performance. Robotic harvesters are a prime example of how automation is revolutionizing agriculture. These advanced machines are designed to pick delicate fruits and vegetables with high precision, minimizing both labor costs and crop damage. By handling tasks that require careful attention, robotic harvesters ensure that produce is collected efficiently without compromising quality. This not only reduces the need for manual labor but also helps to address labor shortages that many farmers face. For instance, In September 2023 – At VertiFarm, the international trade fair for Next Level Farming and New Food Systems, W?rth Elektronik demonstrated how modern electronic components and expertise in food production can drive innovation. At booth 4.D24, the manufacturer of electronic and electromechanical components, in collaboration with lighting specialist ENGEL LIGHTING, showcased concepts and technologies for vertical farming.

Drones, another key component of automation, are equipped with cameras and sensors that provide valuable aerial insights into crop health. These drones can monitor large areas quickly and accurately, offering data on factors such as crop growth, soil conditions, and pest activity. This real-time information enables farmers to make informed decisions regarding irrigation, fertilization, and pest control, leading to optimized resource use and improved crop management.

The integration of automation and robotics in specialty crop farming also contributes to higher yields and better-quality crops. Automated systems enhance productivity by performing repetitive and time-consuming tasks with consistency and precision. For instance, In April 2023, Bosch BASF Smart Farming and AGCO entered a strategic collaboration to jointly develop and commercialize innovative smart spraying technologies. This partnership aims to leverage their combined expertise to enhance precision in crop protection and optimize spraying efficiency within the agricultural sector. This allows farmers to focus on strategic decision-making and other critical aspects of farm management. As robotics technology continues to advance, its adoption

in specialty crop farming becomes increasingly practical and cost-effective. Innovations in robotics are making these technologies more accessible and affordable, driving widespread adoption across the industry. The result is a more efficient farming operation that not only meets the growing demand for specialty crops but also supports sustainable and high-quality agricultural practices. The ongoing evolution of automation and robotics is a key factor in shaping the future of smart specialty crop farming.

## Segmental Insights

### Application Insights

Based on the application, in 2023, the Fruits and Tree Nuts segment emerged as the dominant category in the Global Smart Specialty Crop Farming Market. This dominance is attributed to several key factors that highlight the growing importance and profitability of this sector. Fruits and tree nuts are increasingly sought after for their nutritional value, culinary versatility, and high market demand. This sector's emphasis on premium, high-value crops has driven the adoption of smart farming technologies designed to enhance yield, quality, and operational efficiency.

Smart farming solutions, such as precision irrigation systems and AI-driven crop management tools, are particularly effective for fruit and tree nut cultivation. These technologies enable farmers to monitor and optimize critical factors such as soil moisture, nutrient levels, and pest management, which are crucial for the successful growth and quality of fruits and nuts. For instance, precision irrigation systems ensure that water is delivered efficiently and in the right amounts, preventing over- or under-watering that can affect fruit quality and yield.

### Product Type Insights

In 2023, the Controlled Environment Agriculture (CEA) Systems Hardware segment emerged as the dominant product type in the Global Smart Specialty Crop Farming Market. This dominance is primarily due to the increasing emphasis on optimizing growing conditions and improving yield consistency for specialty crops. CEA systems, which include advanced technologies such as climate control systems, hydroponic and aeroponic setups, and LED grow lights, offer significant advantages in terms of precision and efficiency.

Controlled environment agriculture allows for the meticulous regulation of variables such as temperature, humidity, light, and CO2 levels, creating ideal conditions for crop



growth regardless of external weather conditions. This control is especially beneficial for high-value specialty crops that require specific conditions to thrive, such as herbs, vegetables, and fruits. The ability to produce crops year-round and achieve higher yields with consistent quality makes CEA systems particularly attractive to growers. The growth of urban farming and the rising interest in local and fresh produce have further fueled the demand for CEA systems. Urban and indoor farming operations benefit from the space-saving and efficiency advantages of CEA technologies, which are well-suited to environments where traditional farming is impractical.

## Regional Insights

North America emerged as the dominant region in the Global Smart Specialty Crop Farming Market in 2023, capturing the largest market share. North America boasts a highly developed agricultural sector with significant investments in advanced technologies. The region is a leader in adopting smart farming solutions, including precision agriculture, automation, and data analytics. These technologies have been widely integrated into farming practices, enhancing productivity and efficiency in specialty crop cultivation.

Substantial government support and funding have bolstered the growth of smart specialty crop farming in North America. Various federal and state programs provide grants, subsidies, and incentives to encourage the adoption of innovative agricultural technologies. This financial backing has accelerated the development and implementation of cutting-edge solutions, further solidifying North America's position as a market leader. The presence of major agritech companies and research institutions in North America contributes to the region's dominance. These organizations drive innovation through continuous research and development, bringing advanced technologies to market faster. Their efforts have led to the creation of sophisticated tools and solutions tailored to the needs of specialty crop farmers.

## Key Market Players

Freight Farms, Inc.

IUNU

CNH Industrial N.V.

Deere & Company.

ams-OSRAM AG

Everlight electronics co., ltd

W?rth Elektronik eiSos GmbH & Co. KG

Netafim Ltd.

Ag Leader Technology

Hexagon AB

#### Report Scope:

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

#### Smart Specialty Crop Farming Market, By Application:

Fruits and Tree Nuts

Vegetables

Culinary Herbs and Spices

Medicinal Herbs

Others

#### Smart Specialty Crop Farming Market, By Product Type:

Open Field Hardware

Controlled Environment Agriculture (CEA) Systems Hardware

Software

## Smart Specialty Crop Farming 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 Smart Specialty Crop Farming Market.

### Available Customizations:

Global Smart Specialty Crop Farming market report with the given market data, TechSci 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).

## 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 & Validation
- 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, and Trends

### **4. VOICE OF CUSTOMER**

### **5. GLOBAL SMART SPECIALTY CROP FARMING MARKET OUTLOOK**

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Application (Fruits and Tree Nuts, Vegetables, Culinary Herbs and Spices, Medicinal Herbs, Others)
  - 5.2.2. By Product Type (Open Field Hardware, Controlled Environment Agriculture (CEA) Systems Hardware, Software)

- 5.2.3. By Company (2023)
- 5.2.4. By Region
- 5.3. Market Map

## **6. NORTH AMERICA SMART SPECIALTY CROP FARMING MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Application
  - 6.2.2. By Product Type
  - 6.2.3. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Smart Specialty Crop Farming 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 Application
      - 6.3.1.2.2. By Product Type
  - 6.3.2. Mexico Smart Specialty Crop Farming 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 Application
      - 6.3.2.2.2. By Product Type
  - 6.3.3. Canada Smart Specialty Crop Farming Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Application
      - 6.3.3.2.2. By Product Type

## **7. EUROPE SMART SPECIALTY CROP FARMING MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Application
  - 7.2.2. By Product Type

### 7.2.3. By Country

## 7.3. Europe: Country Analysis

### 7.3.1. France Smart Specialty Crop Farming 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 Application

##### 7.3.1.2.2. By Product Type

### 7.3.2. Germany Smart Specialty Crop Farming 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 Application

##### 7.3.2.2.2. By Product Type

### 7.3.3. United Kingdom Smart Specialty Crop Farming 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 Application

##### 7.3.3.2.2. By Product Type

### 7.3.4. Italy Smart Specialty Crop Farming Market Outlook

#### 7.3.4.1. Market Size & Forecast

##### 7.3.4.1.1. By Value

#### 7.3.4.2. Market Share & Forecast

##### 7.3.4.2.1. By Application

##### 7.3.4.2.2. By Product Type

### 7.3.5. Spain Smart Specialty Crop Farming 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 Application

##### 7.3.5.2.2. By Product Type

## **8. ASIA-PACIFIC SMART SPECIALTY CROP FARMING MARKET OUTLOOK**

### 8.1. Market Size & Forecast

#### 8.1.1. By Value

### 8.2. Market Share & Forecast

#### 8.2.1. By Application

8.2.2. By Product Type

8.2.3. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Smart Specialty Crop Farming 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 Application

8.3.1.2.2. By Product Type

8.3.2. India Smart Specialty Crop Farming 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 Application

8.3.2.2.2. By Product Type

8.3.3. South Korea Smart Specialty Crop Farming Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Application

8.3.3.2.2. By Product Type

8.3.4. Japan Smart Specialty Crop Farming Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Application

8.3.4.2.2. By Product Type

8.3.5. Australia Smart Specialty Crop Farming Market Outlook

8.3.5.1. Market Size & Forecast

8.3.5.1.1. By Value

8.3.5.2. Market Share & Forecast

8.3.5.2.1. By Application

8.3.5.2.2. By Product Type

## **9. SOUTH AMERICA SMART SPECIALTY CROP FARMING MARKET OUTLOOK**

9.1. Market Size & Forecast

9.1.1. By Value

9.2. Market Share & Forecast



- 9.2.1. By Application
- 9.2.2. By Product Type
- 9.2.3. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Smart Specialty Crop Farming 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 Application
      - 9.3.1.2.2. By Product Type
  - 9.3.2. Argentina Smart Specialty Crop Farming 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 Application
      - 9.3.2.2.2. By Product Type
  - 9.3.3. Colombia Smart Specialty Crop Farming 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 Application
      - 9.3.3.2.2. By Product Type

## **10. MIDDLE EAST AND AFRICA SMART SPECIALTY CROP FARMING MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Application
  - 10.2.2. By Product Type
  - 10.2.3. By Country
- 10.3. MEA: Country Analysis
  - 10.3.1. South Africa Smart Specialty Crop Farming Market Outlook
    - 10.3.1.1. Market Size & Forecast
      - 10.3.1.1.1. By Value
    - 10.3.1.2. Market Share & Forecast
      - 10.3.1.2.1. By Application
      - 10.3.1.2.2. By Product Type

### 10.3.2. Saudi Arabia Smart Specialty Crop Farming Market Outlook

#### 10.3.2.1. Market Size & Forecast

##### 10.3.2.1.1. By Value

#### 10.3.2.2. Market Share & Forecast

##### 10.3.2.2.1. By Application

##### 10.3.2.2.2. By Product Type

### 10.3.3. UAE Smart Specialty Crop Farming Market Outlook

#### 10.3.3.1. Market Size & Forecast

##### 10.3.3.1.1. By Value

#### 10.3.3.2. Market Share & Forecast

##### 10.3.3.2.1. By Application

##### 10.3.3.2.2. By Product Type

## 11. MARKET DYNAMICS

### 11.1. Drivers

### 11.2. Challenges

## 12. MARKET TRENDS & DEVELOPMENTS

### 12.1. Merger & Acquisition (If Any)

### 12.2. Product Launches (If Any)

### 12.3. Recent Developments

## 13. PORTERS FIVE FORCES ANALYSIS

### 13.1. Competition in the Industry

### 13.2. Potential of New Entrants

### 13.3. Power of Suppliers

### 13.4. Power of Customers

### 13.5. Threat of Substitute Products

## 14. COMPETITIVE LANDSCAPE

### 14.1. Freight Farms, Inc.

#### 14.1.1. Business Overview

#### 14.1.2. Company Snapshot

#### 14.1.3. Products & Services

#### 14.1.4. Financials (As Reported)

- 14.1.5. Recent Developments
- 14.1.6. Key Personnel Details
- 14.1.7. SWOT Analysis
- 14.2. IUNU
- 14.3. CNH Industrial N.V.
- 14.4. Deere & Company.
- 14.5. ams-OSRAM AG
- 14.6. Everlight electronics co., ltd
- 14.7. W?rth Elektronik eiSos GmbH & Co. KG
- 14.8. Netafim Ltd.
- 14.9. Ag Leader Technology
- 14.10. Hexagon AB

## **15. STRATEGIC RECOMMENDATIONS**

## **16. ABOUT US & DISCLAIMER**

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