

Agricultural Irrigation Machinery Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** AgTech, Precision Farming & Irrigation (Agriculture & Agribusiness)
> ****Source:**** <https://www.mordorintelligence.com/industry-reports/agricultural-irrigation-machinery-market>
> ****Scraped Date:**** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 8.01 billion
Projected Forecast (2031)	USD 8.01 billion
Growth Rate (CAGR)	5.34 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Agricultural Irrigation Machinery industry](images/chart_2.png)

! [Agricultural Irrigation Machinery Market Size](images/chart_3.png)

! [Agricultural Irrigation Machinery Market Share by Irrigation Type, 2025](images/chart_4.png)

! [Agricultural Irrigation Machinery Market Share by Application Type, 2025](images/chart_5.png)

! [Agricultural Irrigation Machinery Market Growth Rate by Region](images/chart_6.png)

! [Agricultural Irrigation Machinery Market Concentration](images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview	Study Period	2021 - 2031
Market Size (2026)		USD 8.01 Billion
Market Size (2031)		USD 10.39 Billion
Growth Rate (2026 - 2031)		5.34 %
Fastest Growing Market		Asia Pacific

Largest Market | North America |

Market Concentration | High |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Agricultural Irrigation Machinery Market Analysis by Mordor IntelligenceThe agricultural irrigation machinery market size was valued at USD 7.60 billion in 2025 and estimated to grow from USD 8.01 billion in 2026 to reach USD 10.39 billion by 2031, at a CAGR of 5.34% during the forecast period (2026-2031). Demand is focusing on equipment that integrates water-use efficiency with digital compliance reporting, driving changes in capital spending priorities faster than traditional subsidy cycles. State-level water-reporting mandates in California and Arizona are accelerating sensor adoption, while India's micro-irrigation grants are compressing grower payback horizons from five years to less than three. Pivot upgrades dominate in North American grain belts, but fragmented holdings across Asia-Pacific are steering growers toward modular drip kits. Patent activity in variable-rate irrigation doubled after 2024, confirming that manufacturers see zone-specific delivery as the next competitive battleground.

Key Report Takeaways* By irrigation type, drip irrigation held the largest segment, accounting for 46.0% of the agricultural irrigation machinery market share in 2025, while sprinkler irrigation is the fastest-growing segment, projected to advance at an 8.0% CAGR through 2031.

* By application, grains and cereals held the largest share, 37.6%, of the agricultural irrigation machinery market size in 2025, while fruits and vegetables are the fastest-growing segment, projected to expand at a 9.4% CAGR to 2031.

* By geography, North America was the largest region with 32.1% in 2025, and Asia-Pacific is set to log the fastest-growing regional CAGR at 8.0% through 2031.

Key Market Trends

Market Trends and InsightsDrivers Impact Analysis of Agricultural Irrigation Machinery Market*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |

Government subsidies for micro-irrigation adoption | +2.1% | Asia-Pacific core, spillover to Middle East and Africa | Medium term (2-4 years) |

Rising water scarcity is pushing demand for precision irrigation | +2.5% | Global, with peak intensity in Middle East, North Africa, and California | Long term (≥4 years) |

Labor shortages are accelerating the mechanization of mid-size farms | +1.8% | North America and Europe, and emerging in Asia-Pacific | Short term (≤2 years) |

Integration of IoT sensors enabling pay-as-you-grow service models | +1.2% | North America and Europe are early adopters, and Asia-Pacific is following | Medium term (2-4 years) |

Environmental, Social, and Governance (ESG)-linked finance rewarding water-efficiency investments | +0.9% | Europe and North America, and with selective uptake in the Asia-Pacific | Long term (≥4 years) |

Surge in carbon-credit schemes for water-saving technologies | +0.7% | Global, with the highest activity in voluntary carbon markets | Long term (≥4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The agricultural irrigation machinery market is consolidated, with key players including The Toro Company, Lindsay Corporation, Valmont Industries, Inc. (Valley

Irrigation), Netafim Ltd. (Orbia Advance Corporation), and Jain Irrigation Systems Limited (Rivulis Irrigation Limited). Netafim Ltd. utilizes agronomic advisory services to secure multi-season contracts, while Lindsay Corporation focuses on expanding its FieldNET analytics platform to encourage subscription renewals. Valmont Industries, Inc.'s Q1 2025 results highlight a shift toward software-enabled margin resilience, even as unit volumes stabilize in the North American market.

New entrants are targeting high-growth areas such as AI-guided scheduling and low-pressure drip tapes designed for smallholders. Patent filings are increasingly centered on sensor fusion and water-use algorithms, driving accelerated innovation cycles. Environmental, Social, and Governance (ESG) criteria are influencing procurement decisions, with preference given to companies offering recycling programs and transparent supply chains. Manufacturers that combine hardware reliability with integrated digital ecosystems are strengthening their competitive positions in the agricultural irrigation machinery market.

Cybersecurity has become a strategic priority as connected irrigation systems present potential vulnerabilities. Vendors are investing in encrypted communication protocols and remote firmware updates to address the concerns of risk-averse growers. Certification under programs such as the Environmental Protection Agency (EPA) WaterSense enhances access to subsidy opportunities, further supporting brand loyalty. Overall, established players that transition to full-stack solutions are better positioned to outperform competitors relying solely on mechanical offerings.

Agricultural Irrigation Machinery Industry Leaders* The Toro Company

* Lindsay Corporation

* Valmont Industries, Inc. (Valley Irrigation)

* Netafim Ltd. (Orbia Advance Corporation)

* Jain Irrigation Systems Limited (Rivulis Irrigation Limited)

* *Disclaimer: Major Players sorted in no particular order

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Scope Methodology P Space

For this study, the market covers machinery and equipment used to move, control, and apply water on farms, across irrigation approaches such as drip, sprinkler, pivot, and related supporting hardware that is sold for agricultural use.

Scope exclusions: We exclude civil irrigation infrastructure (canals, dams, and major pipelines), general farm water storage works, and purely service-only revenues where no machinery is sold.

Segmentation Container

* By Irrigation Type* Sprinkler Irrigation

* Drip Irrigation

* Pivot Irrigation

* Other Irrigation Types

* By Application Type* Grains and Cereals

* Pulses and Oilseeds

* Fruits and Vegetables

* Other Applications

* By Geography* North America* United States

- * Canada
- * Mexico
- * Rest of North America
- * Europe* Germany
- * United Kingdom
- * France
- * Italy
- * Netherlands
- * Russia
- * Rest of Europe
- * Asia-Pacific* China
- * India
- * Japan
- * Cambodia
- * Rest of Asia-Pacific
- * South America* Brazil
- * Argentina
- * Peru
- * Rest of South America
- * Middle East* Saudi Arabia
- * Turkey
- * Rest of Middle East
- * Africa* South Africa
- * Egypt
- * Rest of Africa

Frequently Asked Questions

What is the projected value of the agricultural irrigation machinery market in 2031?

The agricultural irrigation machinery market was valued at USD 7.60 billion in 2025 and estimated to grow from USD 8.01 billion in 2026 to reach USD 10.39 billion by 2031, at a CAGR of 5.34% during the forecast period (2026-2031).

Which irrigation type is growing fastest?

Sprinkler irrigation is the fastest-growing segment, projected to advance at an 8.0% CAGR through 2031.

What policy is driving sensor adoption in California?

Senate Bill 88, effective October 2025, requires diversion measurement and reporting, boosting demand for sensor-equipped systems.

How do pay-as-you-grow models affect capital cost?

Leasing bundles that include IoT sensors reduce upfront expenditure by 40% to 60%, making precision irrigation accessible to cash-constrained growers.