

Fertigation and Chemigation Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

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

Executive Market Summary

Market Metric	Details
Base Market Size	USD 52.68 billion
Projected Forecast (2031)	USD 52.68 billion
Growth Rate (CAGR)	4.72 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Fertigation and Chemigation industry] (images/chart_2.png)

! [Fertigation and Chemigation Market Size] (images/chart_3.png)

! [Fertigation and Chemigation Market Share by Input Type, 2025] (images/chart_4.png)

! [Fertigation and Chemigation Market Share by Application, 2025] (images/chart_5.png)

! [Fertigation and Chemigation Market Growth Rate by Region] (images/chart_6.png)

! [Fertigation and Chemigation 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 52.68 Billion
Market Size (2031)		USD 66.33 Billion
Growth Rate (2026 - 2031)		4.72 %
Fastest Growing Market		Africa
Largest Market		Europe
Market Concentration		Medium

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

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Market Overview

Fertigation and Chemigation Market Analysis by Mordor IntelligenceThe fertigation and chemigation market size is expected to grow from USD 50.3 billion in 2025 to USD 52.68 billion in 2026 and is forecast to reach USD 66.33 billion by 2031 at 4.72% CAGR over 2026-2031. This growth is driven by increasing water scarcity concerns, rising fertilizer costs emphasizing efficiency needs, and the integration of the Internet of Things (IoT) and Artificial Intelligence (AI) technologies in nutrient delivery systems. These factors are transforming farm management practices, reducing operational waste, and improving adaptability to climate change. Companies are investing in research and development of water-soluble formulations, cloud-based control systems, and sensor technologies that monitor moisture, salinity, and nutrient levels in real-time. Governments across developed and developing nations are expanding micro-irrigation subsidies, facilitating equipment upgrades, and supporting domestic innovation. Input manufacturers are integrating software solutions, agronomic services, and maintenance support to enhance customer retention and value.

Key Report Takeaways* By input type, fertilizers accounted for 45.42% of the fertigation and chemigation market share in 2025, while biostimulants and micronutrients are projected to grow at a CAGR of 9.68% through 2031.

* By crop type, fruits and vegetables represented 37.35% of the fertigation and chemigation market in 2025, with plantation crops projected to achieve the highest CAGR of 7.62% through 2031.

* By application environment, open-field agriculture maintained a 56.20% share of the fertigation and chemigation market size in 2025, while urban vertical farming is growing at a CAGR of 10.15% during 2026-2031.

* By irrigation type, drip systems dominated with a 60.25% share of the fertigation and chemigation market size in 2025, with subsurface and other systems growing at a CAGR of 11.78% during the same period.

* By geography, Europe captured 33.62% of revenue share in 2025, while Africa is anticipated to grow at the highest CAGR of 8.92% through 2031.

Key Market Trends

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

Rising Demand for Food Security and Yield Maximization | +1.50% | Global, with highest impact in Asia-Pacific and Africa | Long term (≥ 4 years) |

Government Subsidies and Micro-Irrigation Incentives | +1.20% | Asia-Pacific, North America, Europe | Medium term (2-4 years) |

Growing Water Scarcity Heightens Efficient Nutrient Delivery | +1.30% | Middle East, Africa, Asia-Pacific, Western North America | Long term (≥ 4 years) |

Rapid Adoption of Water-Soluble Specialty Fertilizers | +0.80% | North America, Europe, Asia-Pacific | Medium term (2-4 years) |

IoT-enabled variable-rate fertigation systems | +0.6% | North America, Europe, Advanced Asia-Pacific markets | Medium term (2-4 years) |

Labor and Cost Efficiency | +0.4% | Global, with highest impact in labor-constrained developed markets | Short term (≤ 2 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The fertigation and chemigation market maintains a moderate concentration, with five major companies controlling 63% of 2024 revenues. Netafim Limited (An Orbia Business) holds the largest share at 18.2%, followed by Jain Irrigation Systems Limited (Rivulis), Lindsay Corporation, Valmont Industries, Inc., and The Toro Company. These companies are strengthening their market positions through expanded software capabilities and service contracts. The competitive focus has shifted toward developing open-architecture control systems that integrate with third-party sensors, weather data, and farm management platforms.

Significant market potential exists in emerging regions where economic viability depends on cost-efficient equipment and financing options. The vertical farming segment attracts venture capital investment, particularly for start-ups developing lightweight, sensor-equipped modules. Established manufacturers respond through strategic acquisitions of dosing-pump manufacturers and AI company partnerships to enhance their predictive analytics capabilities. Companies are expanding their service offerings to include design, installation, maintenance, and remote monitoring, creating stronger customer relationships through increased switching costs.

Smaller suppliers target specialized markets, such as subsurface drip systems for shallow-root cotton or salt-tolerant vegetable varieties. Specialty fertigation input suppliers are integrating consumable products with equipment leasing options, facilitating vertical integration of supply chains and margin stability.

Fertigation and Chemigation Industry Leaders* Netafim Limited (An Orbia Business)

* Jain Irrigation Systems Limited (Rivulis)

* Lindsay Corporation

* Valmont Industries, Inc.

* The Toro Company

* *Disclaimer: Major Players sorted in no particular order

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Scope Methodology P Space

This market covers the revenues generated from systems and inputs used to apply water soluble fertilizers and crop protection chemicals through pressurized irrigation in farms and controlled growing setups. It includes the delivery process through irrigation infrastructure where nutrients or chemicals are injected and distributed with irrigation water.

Scope exclusions: It excludes stand-alone nutrient mixing equipment not tied to irrigation delivery, foliar spray equipment, and purely agronomic consulting services.

Segmentation Container

* By Input Type* Fertilizers

* Insecticides

* Fungicides

* Herbicides

* Biostimulants and Micronutrients

* Other Input Types

* By Crop Type* Cereals and Grains

* Oilseeds and Pulses

* Fruits and Vegetables

- * Plantation Crops
- * Turf and Ornamentals
- * Other Crop Types
- * By Application* Open-Field Agriculture
- * Greenhouse and Hydroponics
- * Nursery and Landscaping
- * Urban Vertical Farming
- * Other Applications
- * By Irrigation Type* Drip Irrigation
- * Sprinkler Irrigation
- * Other Irrigation Types
- * By Geography* North America* United States
- * Canada
- * Mexico
- * Rest of North America
- * Europe* Germany
- * United Kingdom
- * France
- * Italy
- * Spain
- * Russia
- * Rest of Europe
- * Asia-Pacific* China
- * India
- * Japan
- * Australia
- * South Korea
- * Rest of Asia-Pacific
- * South America* Brazil
- * Argentina
- * Rest of South America
- * Middle East* Turkey
- * Saudi Arabia
- * United Arab Emirates
- * Rest of Middle East
- * Africa* South Africa
- * Egypt
- * Kenya
- * Rest of Africa

Frequently Asked Questions

What is the current value of the fertigation and chemigation market?

The fertigation and chemigation market size reached USD 52.68 billion in 2026 and is projected to climb to USD 66.33 billion by 2031.

Which irrigation method holds the largest share?

Drip systems dominate with 60.25% of fertigation and chemigation market share in 2025 because they deliver water and nutrients precisely to root zones.

Which region is projected to grow the fastest?

Africa is projected to achieve the highest CAGR of 8.92% through 2031, driven by increasing water scarcity and soil health initiatives that encourage fertigation investments.

How are governments encouraging adoption?

Subsidies, grants, and low-interest financing, including programs such as the US DA's conservation funding and India's micro-irrigation incentives, help farmers reduce capital costs and promote the faster adoption of technology.

What is the main barrier to wider adoption of variable-rate fertigation?

High upfront costs remain the chief constraint, with economic studies indicating payback periods that can exceed 27 years for sophisticated systems.