

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

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

Executive Market Summary

Market Metric	Details
:---	:---
Base Market Size	USD 9.16 billion
Projected Forecast (2031)	USD 9.16 billion
Growth Rate (CAGR)	9.08 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

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

![Precision Irrigation Market Summary](images/chart_3.png)

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

![Precision Irrigation Market: Market Share by Crop Type, 2025](images/chart_5.png)

![Precision Irrigation Market CAGR (%), Growth Rate by Region](images/chart_6.png)

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

![Icon](images/chart_8.png)

![footer background image](images/chart_10.png)

![Mordor Intelligence on Facebook](images/chart_12.svg)

![Mordor Intelligence on Pinterest](images/chart_14.svg)

![Mordor Intelligence on Instagram](images/chart_15.svg)

![ESOMAR](images/chart_17.png)

![GPTW](images/chart_19.png)

Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2021 - 2031
Market Size (2026)	USD 9.16 Billion
Market Size (2031)	USD 14.15 Billion
Growth Rate (2026 - 2031)	9.08 %

Fastest Growing Market | Africa |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

|

Market Overview

Precision Irrigation Market Analysis by Mordor IntelligenceThe precision irrigation market size was valued at USD 8.4 billion in 2025 and estimated to grow from USD 9.16 billion in 2026 to reach USD 14.15 billion by 2031, at a CAGR of 9.08% during the forecast period (2026-2031). Climate-driven water scarcity, stricter groundwater allocations, and subsidy programs that defray up-front costs are accelerating equipment replacement cycles and tilting capital toward drip and variable-rate platforms. Mid-size farms continue to dominate the installed base, yet larger enterprises are scaling automation fastest as labor constraints and centralized water management push them toward sensor-driven scheduling. Hardware margins are compressing as commoditized Internet of Things (IoT) sensors enter the channel, redirecting supplier focus toward subscription software that bundles telemetry, analytics, and compliance reporting. Competitive intensity remains moderate, with major players still controlling a majority of global revenue, while sensor-agnostic software entrants are unbundling legacy stacks and capturing growers that refuse to scrap functional pivots.

Key Report Takeaways

- * By irrigation type, drip irrigation led with a 53.35% share of the precision irrigation market in 2025 and is also projected to expand at a 10.42% CAGR through 2031.
- * By component, controllers and timers held a 31.40% market share in the precision irrigation market in 2025, while software and services are poised to grow at a 11.57% CAGR through 2031.
- * By crop type, field crops accounted for 37.35% of the precision irrigation market share in 2025, whereas orchards and vineyards are set to advance at an 10.82% CAGR through 2031.
- * By geography, North America commanded a 31.55% market share in the precision irrigation market in 2025, while Africa is the fastest-growing region, with a 10.05% CAGR projected through 2031.

Key Market Trends

Global Precision Irrigation Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Subsidy Expansions for Water-Efficient Farming	+1.8%	North America, Europe, India, and Australia	Medium term (2–4 years)
Rising Adoption of Drip Systems in Horticulture Clusters	+1.5%	Asia-Pacific, South America, and Mediterranean Europe	Medium term (2–4 years)
Integration of Soil-Moisture IoT (Internet of Things) Sensors	+1.3%	North America, Europe, Australia, and select Asia-Pacific	Short term (≤ 2 years)
Pivot-Retrofit Kits Lowering CAPEX for Mid-Size Farms	+0.9%	North America, South America, and Australia	Short term (≤ 2 years)
Corporate Net-Zero Pledges Driving Water-Use KPIs	+0.7%	Global, led by North America, and Europe	Long term (≥ 4 years)
Surge in Agri-Venture Capitalist Funding for Water-Stress Regions	+0.6%	Middle East, Africa, and South Asia	Medium term (2–4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The precision irrigation market remains moderately concentrated, with the top five suppliers accounting for a majority of global revenue in 2024 following a new wave of consolidation. Netafim Ltd (Orbia Advance Corporation), Valmont Industries, Inc., and Lindsay Corporation continue to dominate the market, supported by vertically integrated manufacturing, proprietary technology stacks, and extensive dealer networks that span all major irrigated regions. Rivulis Pte. Ltd. (Temasek Holdings Pte. Ltd.) has increased its market share significantly after acquiring Jain Irrigation's international assets, highlighting the role of mergers and acquisitions as a fast track to scale in a market where growers typically replace hardware only once every decade. The Toro Company has also entered the top tier, leveraging its expertise in turf-focused smart controllers to expand into agriculture, with notable success in water-scarce regions such as California and Australia.

Technological innovation remains a critical area of competition. Valmont's FieldNET Advisor reached 42,000 paying subscriptions in 2024, integrating evapotranspiration models with in-field sensors to achieve an average water savings of 18%. Lindsay Corporation expanded its FieldNET platform to include satellite-based crop health imagery, covering 1.2 million hectares and enabling growers to synchronize variable-rate irrigation prescriptions with real-time vegetation indices. Patent activity underscores the emphasis on technology: Netafim secured seven patents related to pressure-compensating emitters and fertigation automation, while Toro obtained five patents for weather-adaptive controller logic and wireless valve communication.

Growth opportunities are emerging in areas such as after-sales services in Africa, small-farm financing in South Asia, and sensor-agnostic analytics that separate software functionality from hardware dependency. Companies like CropX and Semios offer cloud-based dashboards priced at USD 8-15 per hectare, appealing to growers who prefer to retain existing functional equipment. In February 2024, Reinke demonstrated this modular approach by integrating CropX telemetry into its control panels, maintaining pivot sales while generating recurring revenue from data services. Vendors that adopt open data architectures and establish efficient repair networks are well-positioned to capture market share, especially as regulatory requirements and carbon-credit programs make real-time water usage tracking a standard feature rather than an optional upgrade.

Precision Irrigation Industry Leaders* Netafim Ltd (Orbia Advance Corporation)

* Valmont Industries, Inc.

* Lindsay Corporation

* Rivulis Pte. Ltd. (Temasek Holdings Pte. Ltd.)

* The Toro Company

* *Disclaimer: Major Players sorted in no particular order

Image © Mordor Intelligence. Reuse requires attribution under CC BY 4.0.

Scope Methodology P Space

For this methodology, the precision irrigation market is defined as the revenue generated from equipment, software, and services that help apply water at the right time and in the right quantity, using control and sensing to improve farm water efficiency.

Scope exclusions: It excludes conventional flood and non-automated irrigation ha

rdware that does not support measured, controlled, or sensor- or controller-led water application.

Segmentation Container

- * By Irrigation Type* Sprinkler Irrigation* Traditional Sprinklers
- * Center Pivot Sprinklers
- * Lateral / Linear Move Sprinklers
- * Drip Irrigation* Surface Drip Irrigation
- * Sub-surface Drip Irrigation
- * Precision Mobile Drip Irrigation
- * Other Types
- * By Component* Controllers and Timers
- * Flow Meters and Valves
- * Soil-Moisture Sensors
- * Software and Services
- * By Crop Type* Field Crops
- * Plantation Crops
- * Orchards and Vineyards
- * Turf and Ornamentals
- * By Geography* North America* United States
- * Canada
- * Mexico
- * Rest of North America
- * Europe* Germany
- * United Kingdom
- * France
- * Spain
- * Italy
- * 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* Saudi Arabia
- * United Arab Emirates
- * Turkey
- * Rest of Middle East
- * Africa* South Africa
- * Kenya
- * Rest of Africa

Frequently Asked Questions

What was the precision irrigation market size in 2026?

It reached USD 9.16 billion and is projected to hit USD 14.15 billion by 2031.

Why are software and services gaining share?

Growers prefer subscription analytics that bundle sensors, weather data, and compliance reporting, supporting an 11.57% CAGR for this component.

Which region is growing fastest?

Africa leads at a projected 10.05% CAGR, supported by multilateral financing but challenged by service-network gaps.

What restrains adoption among smallholders?

High initial capital, fragmented landholdings, and weak after-sales support raise per-hectare costs and risk.