

Smart Irrigation Market Size & Share Analysis - Growth Trends and Forecast (2025 - 2030)

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

Executive Market Summary

Market Metric	Details
Base Market Size	USD 2.5 billion
Projected Forecast (2031)	USD 2.5 billion
Growth Rate (CAGR)	18.30 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

- [Major players in Smart Irrigation industry](images/chart_2.png)
- [Smart Irrigation Market (2025 - 2030)](images/chart_3.png)
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- [Smart Irrigation Market CAGR (%), Growth Rate by Region](images/chart_6.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2020 - 2030
Market Size (2025)	USD 2.5 Billion
Market Size (2030)	USD 5.80 Billion
Growth Rate (2025 - 2030)	18.30 %
Fastest Growing Market	Asia Pacific
Largest Market	North America
Market Concentration	Medium

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Market Overview

Smart Irrigation Market Analysis by Mordor IntelligenceThe smart irrigation market size is estimated at USD 2.5 billion in 2025, and is projected to reach USD 5.8 billion by 2030, at a CAGR of 18.30% during the forecast period. Water-scarcity policies, rapid sensor innovation, and service-based business models are converging to accelerate technology roll-out across farm and landscape settings. State-level regulations in California that mandate annual water budgets, the European Union’s Water Reuse Regulation, and the United States Environmental Protection Agency’s infrastructure outlays are together creating an enforceable framework that favors data-driven irrigation equipment[1]Source: California State Water Resources Control Board, “Urban Water Use Objective: Adopted Regulations,” waterboards.ca.gov. Agricultural growers seeking stable crop yields during weather uncertainties, turf managers following municipal water restrictions, and financial institutions valuing water-efficiency carbon credits drive market demand. Technology suppliers are responding with integrated platforms that combine soil-moisture probes, satellite evapotranspiration feeds, and AI scheduling engines, which lower operating costs and boost return on investment. The competitive field, therefore, rewards companies that offer open, cyber-secure architectures and service subscriptions that minimize up-front capital outlays for smallholder farmers.

Key Report Takeaways

- * By component, sensors held 38% of the smart irrigation market share in 2024, while soil-moisture sensors are forecast to grow at 21.4% CAGR through 2030.
- * By system type, sensor-based systems captured 56% revenue share of the smart irrigation market size in 2024 and are projected to expand at 19.8% CAGR to 2030.
- * By application, agriculture accounted for 62% of the smart irrigation market demand in 2024, and the greenhouse automation is set to rise at a 20.3% CAGR to 2030.
- * By irrigation type, drip and micro-irrigation recorded 52% of the smart irrigation market size in 2024, while subsurface drip irrigation is anticipated to advance at a 20% CAGR through 2030.
- * By geography, North America led with a 45% share of the smart irrigation market in 2024, and Asia-Pacific represents the fastest-growing region at 19.2% CAGR to 2030.
- * The Toro Company, Rain Bird Corporation, Lindsay Corporation, Valmont Industries, Inc., and Netafim (Orbia) together commanded 45.2% combined market share in 2024.

Key Market Trends

Global Smart Irrigation Market Trends and InsightsDrivers Impact Analysis*

Driver	I (~) % Impact on CAGR Forecast	I Geographic Relevance	I Impact Timeline
Government water-use regulations and subsidies	+4.2%	Global, with strongest impact in North America and EU	Medium term (2-4 years)
Rapid adoption of IoT sensors and cloud analytics	+3.8%	Global, with Asia-Pacific leading adoption velocity	Short term (≤ 2 years)
Rising demand for high-value horticulture and turf management	+2.9%	North America, Europe, with expansion to Asia-Pacific urban centers	Medium term (2-4 years)
Satellite-driven evapotranspiration scheduling adoption	+2.1%	Global, with early deployment in water-stressed regions	Long term (≥ 4 years)

Emergence of irrigation-as-a-service business models | +1.8% | Asia-Pacific core, spill-over to Middle East and Africa, and South America | Medium term (2-4 years) |
Carbon-credit monetization for water-efficient farming | +1.4% | Global, with regulatory frameworks developing in EU and North America | Long term (≥ 4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The market remains moderately fragmented, with the five largest firms accounting for only 45.2% of combined revenue in 2024, providing significant opportunities for specialists and new entrants. The Toro Company topped the chart with a significant share through an array of residential and commercial controllers, sensors, and drip lines. Rain Bird Corporation, leveraging brand equity and global distribution. Valmont Industries, Inc. and Lindsay Corporation blend hardware with telematics on center-pivot platforms, while Netafim Ltd. (Orbia Advance Corporation, S.A.B. de C.V.)'s agronomic advisory service underpins its drip leadership.

Consolidation appears mostly in strategic technology acquisitions rather than large-scale mergers. Valmont's 2025 unification of four digital platforms into AgSense 365 exemplifies a move to improve user experience and customer retention. Rain Bird's purchase of solar-powered controller start-up Ot0 broadens its homeowner portfolio and shortens innovation cycles. The Toro Company's acquisition of Xiamen Xiangfeng strengthens cost competitiveness in micro-irrigation manufacturing. Start-ups such as Irrigreen and CropX secure venture funding by targeting robotics and sensor analytics niches, introducing competitive tension that pushes incumbents to accelerate R&D.

Suppliers now prioritize software and subscription revenues over one-time hardware sales. Service contracts that bundle monitoring, crop consulting, and carbon credit verification expand gross margins and lock in customers. Firms also differentiate through cybersecurity certifications as farms become recognized attack surfaces. Satellite partnerships, evidenced by Netafim Ltd. (Orbia Advance Corporation, S.A.B. de C.V.) linking with OpenET imagery, create data moats that are hard to replicate. Collectively, these dynamics indicate a contest where algorithm quality, platform openness, and service agility shape competitive advantage in the smart irrigation market.

Smart Irrigation Industry Leaders* The Toro Company

- * Rain Bird Corporation
- * Lindsay Corporation
- * Valmont Industries, Inc.
- * Netafim Ltd. (Orbia Advance Corporation, S.A.B. de C.V.)

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Smart Irrigation Market Report ScopeBy ComponentControllers |
Sensors |
Water/Flow Meters |
Software and Services |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Rest of North America |
South America | Brazil |
| Argentina |
| Rest of South America |
Europe | Germany |
| France |
| United Kingdom |
| Italy |
| Spain |
| Russia |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| South Korea |
| Australia |
| New Zealand |
| Rest of Asia-Pacific |
Middle East | Saudi Arabia |
| Israel |
| Rest of Middle East |
Africa | South Africa |
| Kenya |
| Rest of Africa |

Frequently Asked Questions

What is the current size of the smart irrigation market?

The smart irrigation market size stands at USD 2.5 billion in 2025 and is on course to reach USD 5.8 billion by 2030.

Which region leads the smart irrigation market?

North America leads, holding 45% revenue share in 2024 owing to supportive regulations and mature precision-agriculture infrastructure.

What component segment is growing the fastest?

Soil-moisture sensors are the fastest, expanding at a 21.4% CAGR through 2030 due to their critical data role in precision scheduling.

How fragmented is the competitive landscape?

The top five vendors control 45.2% of revenue, indicating moderate fragmentation with ample room for specialized entrants.

Why are greenhouse applications growing quickly?

Controlled-environment agriculture demands precise water and climate management, driving a 20.3% CAGR in greenhouse smart irrigation adoption.

How are small farmers overcoming high capital costs?

Irrigation-as-a-service contracts and government subsidies, such as India's PM-KUSUM, reduce up-front expenses by converting equipment purchases into manageable operating fees.