



ANMD-MRS1-002 · Advanced Agriculture Technologies

Precision Irrigation Kits

A Global Sustainability Due Diligence & Market Research Study

History 2020–2024 · Base Year 2025 · Forecast 2025–2032 · Outlooks 2035 / 2040 / 2050 · Currency US\$

WHY THIS REPORT

Precision irrigation kits deliver water directly to the crop root zone, turning scarce water and rising input costs into measurable yield, water-use efficiency and farmer-income gains. This decision-grade study sizes the global kits market three ways — value, units/kits and irrigated area (ha) — across kit type, automation level, water source, application and business model, across seven regions and four forward scenarios to 2032, with long-term outlooks to 2050.

SUSTAINABILITY & SDG IMPACT — THE ANMD LENS

Sustainability is this report's backbone, not an afterthought. Beyond yield, precision irrigation delivers measurable water-use efficiency gains, irrigation and evapotranspiration savings, and crop drought-resilience, while reduced runoff and fertiliser leaching strengthen the natural-capital story — each treated as material, evidenced outcomes rather than marketing claims.

Mapped Sustainable Development Goals:

| | | | | |
|-----------------------------|-----------------------------|--|---------------------------------|-------------------------------|
| SDG 2 Zero Hunger | SDG 6 Clean Water | SDG 12 Responsible Consumption | SDG 13 Climate Action | SDG 15 Life on Land |
|-----------------------------|-----------------------------|--|---------------------------------|-------------------------------|

Measurable sustainability outcomes assessed:

- Water-use efficiency and distribution-uniformity gains versus flood or manual irrigation
- Irrigation and evapotranspiration savings metered to the crop calendar
- Reduced runoff, fertiliser leaching and groundwater stress
- Polymer and electronics embodied carbon and plastic end-of-life circularity as material risks

Framework alignment: Double materiality mapped to GRI, SASB, ISSB, TCFD, TNFD, CSRD and the EU Taxonomy, with greenwashing and SDG-washing screens applied throughout.

WHAT'S INSIDE AT A GLANCE

| | | | |
|------------------------------------|-------------------------------|----------------------------------|-------------------------------|
| 53 Chapters | 9 Report Parts | 7 Regions Covered | 40+ Country Markets |
| 2025–32 Forecast Horizon | 4 Forward Scenarios | 25+ Companies Profiled | 5 SDGs Mapped |

REPORT COVERAGE

Geographic scope: North America, Europe, Asia Pacific, Latin America, Africa, Middle East and Rest of World — with named country intelligence. Asia Pacific leads global volume (India, China, Australia); Europe scales on CAP water-efficiency policy; North America accelerates on drought and USDA cost-share programmes.



MARKET OVERVIEW

From subsidy-led pilots to mainstream adoption — where water scarcity meets the yield imperative.

Precision irrigation is moving from subsidy-led pilots to mainstream commercial adoption. Demand is driven by intensifying water scarcity converging with the yield imperative and rising input costs, supported by maturing micro-irrigation incentives across Asia Pacific, Europe and North America. The market is read three ways — value, units/kits and irrigated area (ha) — and forecast under four scenarios, each region reported separately.

- Asia Pacific leads global volume — India, China and Australia, where per-drop-more-crop schemes, water scarcity and dealer networks drive smallholder and estate adoption
- Europe scales on water-efficiency policy — France, Germany, Italy, Spain and the Netherlands, with CAP linkage and high-value horticulture
- North America accelerates on drought and USDA cost-share programmes
- Water-and-yield economics is the differentiator — input savings plus yield gain, increasingly with outcome-based water-saving revenue

REGIONAL OUTLOOK

Across seven reporting regions, the report separates early commercialisation leaders from high-growth and emerging markets — each profiled in full rather than aggregated into Rest of World.

| Region | Stage | Lead Markets & Drivers |
|---------------|---------------|---|
| Asia Pacific | Volume leader | India, China, Australia, Japan — PMKSY, water scarcity, dealer networks |
| Europe | Policy-led | Germany, France, Italy, Spain, Netherlands — CAP water-efficiency, horticulture |
| North America | Accelerating | United States, Canada — drought, USDA EQIP cost-share |
| Latin America | Emerging | Brazil, Chile, Mexico — agribusiness, high-value export crops |
| Africa | Frontier | Egypt, South Africa, Morocco, Kenya — water security, blended finance |
| Middle East | Frontier | Israel, Saudi Arabia, UAE, Turkey — water security, sovereign investment |

KEY MARKET DRIVERS & RESTRAINTS

| Drivers | Restraints |
|---|--|
| <ul style="list-style-type: none"> • Water-scarcity + yield-imperative convergence • Water-use efficiency & input-cost savings • Policy incentives (PMKSY, CAP, USDA EQIP, state schemes) • Farmer yield-gain economics & rural development • Drip, smart-controller & sensor/VRI technology gains | <ul style="list-style-type: none"> • Upfront kit & installation CAPEX vs flood irrigation • Emitter clogging, pressure & maintenance burden • Water-rights, approval & scheme-eligibility rules • Polymer / resin / electronics cost inflation • Farmer adoption, financing & social-licence barriers |



SEGMENTATION SNAPSHOT

| | |
|----------------------------|--|
| By Kit Type | Drip & subsurface drip · sprinkler & micro-spray · fertigation-integrated · smart sensor-automated |
| By Automation Level | Manual · semi-automated · fully smart-automated |
| By Application | Field & row crops · orchards & plantations · greenhouse & horticulture |
| By End User | Farmers · cooperatives / FPOs · agri-corporates · dealers · public schemes |
| By Water Source | Surface · groundwater · recycled / treated |
| By Scale | Smallholder · estate · public scheme |

TABLE OF CONTENTS — PARTS & CHAPTERS

The full report is organised into nine parts across 53 chapters, listed below. Detailed sub-headings, country tables and directories are provided in the full report.

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- › Chapter 2. Industry Discovery Summary — Precision Irrigation Kits
- › Chapter 3. Executive Intelligence and Decision Dashboard
- › Chapter 4. Strategic Findings, Materiality and Investment Verdict Preview

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- › Chapter 7. Global Market Size and Forecast, 2020–2032
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COMPETITIVE & INVESTMENT SNAPSHOT

The competitive field spans global micro-irrigation leaders, established component manufacturers, and regional kit integrators. Deal activity — distribution partnerships, dealer-network expansion and subsidy-linked programmes — signals a market consolidating around bankable, repeatable kit designs.

Representative players profiled in the full report:

Netafim Ltd. · Jain Irrigation Systems Ltd. · Rivulis Pte. Ltd. · The Toro Company · Rain Bird Corporation · and 20+ further profiled players across kits, components and integration.

Investment intelligence: venture, infrastructure, development, climate and blended finance, green bonds and sustainability-linked loans — culminating in a bankability assessment and a Go / No-Go / Conditional-Go investment verdict.



KEY QUESTIONS THIS REPORT ANSWERS

- ? How large is the global precision irrigation kits market, and how fast will it grow to 2032?
- ? Which regions, countries and segments offer the strongest risk-adjusted opportunity?
- ? How do water-and-yield economics change returns versus flood irrigation?
- ? Who leads, and where is the competitive and patent white space?
- ? Is the investment case bankable — and under what conditions?
- ? How does the technology align with the SDGs and emerging disclosure regulation?

WHY ANMD — THE DIFFERENCE

Most market studies stop at units and revenue. This report is built as a sustainability due diligence instrument — fusing market sizing with ESG, SDG, climate, water and natural-capital intelligence and a decision-ready bankability verdict in a single architecture.

- › Triangulated sizing — every market read three ways so value, volume and area views reconcile rather than conflict.
- › Region-honest forecasting — Latin America, Africa and the Middle East reported in full, never hidden inside Rest of World, every forecast resolved to the 2025 base year.
- › Integrated evidence base — company, patent and project databases linked to the analysis, with published-filing patents and FTO treated as an indicator, not a legal conclusion.
- › No-fabrication discipline — every estimate carries a data-confidence rating and disclosed sources; gaps are flagged for further diligence, never filled with invented numbers.
- › Anti-greenwashing rigour — SDG-washing and greenwashing screens plus claim-substantiation checks built into the ESG and project analysis.
- › Decision-first structure — 9 Parts and 53 Chapters culminating in stakeholder playbooks and a clear Go / No-Go / Conditional-Go investment verdict.

WHO SHOULD BUY THIS REPORT

Investors and infrastructure / PE funds, kit manufacturers and component suppliers, dealers and integrators, agribusinesses, cooperatives and FPOs, public irrigation schemes, policymakers and development-finance institutions, and corporate strategy and ESG teams.

Access the Full Report

The complete report delivers all 53 chapters in full, with every sub-heading, country table, company and patent directory, forecast model and due diligence checklist.

Purchase at www.anewmarketdynamics.com · Standard & Premium licences · Single-Site (SSL) and Global-Site (GSL) options at checkout.

Want the Complete Detailed Table of Contents?

This prospectus lists the nine parts and 53 chapters. The complete detailed table of contents — every sub-heading, country table, exhibit, company and patent directory and annex — is available on request to registered users. To receive it, register with your official company email at www.anewmarketdynamics.com. The full detailed table of contents will be sent directly to your registered company email address.