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India Pesticides Industry Analysis to 2018 - Led by Advent of Technologically Advanced Biopesticides

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Abstracts

The report titled "India Pesticides Industry Analysis to 2018 – Led by Advent of Technologically Advanced Biopesticides" provides a detailed overview of the Indian pesticides Industry on the basis of production, consumption and revenue. The report includes coverage on various industry segments including insecticides, herbicides, fungicides, biopesticides, plant growth regulators and rodenticides. The report also features the market share and company profiles of more than 20 major players operating in agro-chemicals business India. The report further elaborates the key trends and developments of the pesticides industry in India over the past few years. Future analysis of this market in the country is provided on the basis of revenue over the next five years from FY'2014-FY'2018

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The report titled “India Pesticides Industry Analysis to 2018 – Led by Advent of Technologically Advanced Biopesticides” provides a detailed overview of the Indian pesticides Industry on the basis of production, consumption and revenue. The report includes coverage on various industry segments including insecticides, herbicides, fungicides, biopesticides, plant growth regulators and rodenticides. The report also features the market share and company profiles of more than 20 major players operating in agro-chemicals business India. The report further elaborates the key trends and developments of the pesticides industry in India over the past few years. Future analysis of this market in the country is provided on the basis of revenue over the next five years from FY’2014-FY’2018.

The pesticides industry in India has undergone a swift growth and structural change in the product mix in the last few years. Over the years, Indian pesticides industry has developed extensively and has contributed significantly towards India’s agriculture and public health. In value terms, the size of the Indian pesticide industry was estimated around INR ~ million in the year 2012-13, recording growth at a CAGR of ~% from FY’2007. The production capacity of the industry is higher than the consumption of pesticides in India thereby showcasing a significant export market. In terms of the supply of pesticides, India ranks fourth globally after the US, Japan and China, thereby indicating the significance of agrochemical industries in India. The crop losses in India due to pest attack are among the highest in the world, while the pesticide usage is among the lowest. However, the governments renewed focus on agriculture, increasing prices of the produce and labor costs have been motivating farmers to use better inputs.

Insecticides commanded the highest share of ~% resulting in the overall pesticides market revenue, aggregating sales worth INR ~ million during FY’2013 followed by herbicides and fungicides with ~% and ~% share respectively. Moreover, the domestic market is majorly held by the generic products accounting for a share of ~% of the industry revenue whereas only ~% of the market is held by patented products as of FY’2013.

Furthermore, the pesticides industry in India is anticipated for growth in the coming years on account of the increasing farmer awareness and adoption of approaches such as contract farming and Integrated Pest Management. The market for generic pesticides in India is likely to increase owing to availability of cheap raw materials, process expertise, low operating costs and research and development strengths which will attract many foreign companies in the sector. This will boost investment in research in this sector in the future. An evolving trend in the pesticides market in India is that there is a shifting focus on developing environment-friendly pesticides by the industry as well as the Government. In this regard the share of bio-pesticides which currently forms a minor portion of the market is projected to gain considerable traction in the coming years. Amidst these developments the pesticides market in India is projected to reach at INR 229,800 million in FY’2018, observing CAGR of 14.7% from FY’2014-FY’2018.

Some of the major factors influencing this market are countries monsoons, food grain production, stature of the country’s agricultural activity, farmer’s income, flow of institutional credit and others.

India agrochemicals market is highly fragmented with over 800 formulators. There is intense competition in the market with a large number of organized and unorganized players engaged in manufacturing of agrochemicals in the industry. The share of unorganized sector stands substantially higher at ~% as compared to the organized sector. Some of the major players in the organized sector of the industry include companies such as United Phosphorus Ltd (UPL), Bayer Crop science Ltd, Rallis India Ltd, Syngenta India Ltd, BASF India Ltd and Dhanuka Agritech Ltd and others.

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