

GLOBAL CROP PROTECTION MARKET FORECAST 2016-2023

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Abstracts

KEY FINDINGS

The global crop protection market is poised to grow during the forecast period of 2016-2023. Various reasons for growth of the crop protection market are rapidly increasing need for food due to continuously rising population, decrease in arable land, need for higher crop yield and increasing purchasing power.

Crop protection refers to usage of pesticides to protect crop from pest by controlling their population and safeguarding them so that no damage is caused to crop and their yield. Pesticides are an integral part of agriculture industry and although it's a mature industry there are growing awareness and demand for biopesticides to minimize environmental harm. Certain pesticides like glyphosate, atrazine and chlorpyrifos have been phased out and this is expected to increase the demand for biopesticides. Biopesticides are made from animals, plants, bacteria and minerals and help in controlling pests by non-poisonous methods.

Crop protection market is segmented on the basis of geography, crop type, mode of application, form, origin and type. Various crop types for which pesticides are used are cereals and grains, fruits and vegetables, oilseeds and pulses and others. Mode of application of pesticides can be foliar spray, seed treatment and soil treatment. Pesticides can be either in liquid or solid form. Pesticide origin can be either synthetic or bio-based. Types of pesticides used for crop protection are herbicides, fungicides, insecticides and others.

MARKET INSIGHTS

Market drivers for crop protection are increasing demand for food, decrease in arable land due to growing urbanization, increasing population, need for better crop yield, higher awareness about food and health safety and advances in farming practices and technology.

Herbicides currently have the biggest share, of nearly 35%, and are expected to report highest growth in the forecast period. Fungicides are the next popular crop protection method after herbicides and has nearly 23% market share. Demand for fungicides is expected to increase over the next seven years due to favorable climatic conditions for fungal growth. Fungicides can be either protectants or eradicants. Biopesticide market will be driven by microbial seed treatment on field crops.

Cereals and grains was the largest application market for pesticides and had 30% market share of total crop protection volume. Pesticides are most commonly used for wheat, rice, sorghum, oats and barley. Liquid form of pesticides was used more commonly than solid form of pesticides. Synthetic pesticides lead the crop protection market but there is growing demand for biopesticides as there is increasing awareness about them being eco-friendly and less toxic.

There are different modes of application for crop protection chemicals and foliar spray is the most popular mode currently. Seed treatment market is predicted to report good growth in the next few years due to rising demand for seeds treated with crop protection chemicals.

Factors that will restrain market growth are stringent government regulations against use of synthetic pesticides, ban on certain pesticides and high product development and registration costs.

Figure: Global Crop protection Market By Geography (%) in 2015

Source: Inkwood Research

REGIONAL INSIGHTS

Market regions that are covered in the report are North America, Europe, Asia-Pacific and South America. Europe and North America have a good market share of crop protection chemicals due to high awareness and advances in farming practices and technology.

Asia-Pacific market is expected to report highest growth in the years 2016-2023. South America too has a high market share of crop protection chemicals market due to growth in population and increase in awareness about benefits of these chemicals. Brazil and Argentina have the biggest market share in this region and expected to show good growth rate over the forecast period.

COMPETITIVE INSIGHTS

The major market players for crop protection are BASF SE (Germany), The Dow Chemical Company (U.S.), E.I. du Pont de Nemours and Company, Sumitomo Chemical Co., Ltd., Syngenta AG (Switzerland), Bayer Cropscience, FMC Corporation, Monsanto Company, Nufarm Limited and ADAMA Agricultural Solutions. Established companies have a good hold on the crop protection market due to high cost of investment needed to enter and sustain in the market. Companies are forming alliances and are going for mergers and acquisitions to strengthen their market position. Organizations are investing in research and development to come up with novel and innovative products that will capture new market share.

Contents

1. RESEARCH SCOPE

- 1.1. STUDY GOALS
- 1.2. MARKET DEFINITION
- 1.3. SCOPE OF THE MARKET STUDY
- 1.4. WHO WILL FIND THIS REPORT USEFUL?
- 1.5. STUDY AND FORECASTING YEARS

2. RESEARCH METHODOLOGY

- 2.1. SOURCES OF DATA
 - 2.1.1. SECONDARY DATA
 - 2.1.2. PRIMARY DATA
- 2.2. MARKET SIZE ESTIMATION
 - 2.2.1. BOTTOM UP APPROACH
 - 2.2.2. TOP DOWN APPROACH
 - 2.2.3. DATA TRIANGULATION

3. EXECUTIVE SUMMARY

4. MARKET OVERVIEW

- 4.1. KEY MARKET DRIVERS
 - 4.1.1. NEED TO PROVIDE FOOD SECURITY TO THE WORLD
 - 4.1.2. INCREASING DEMAND OF HEALTHY AND HARMFUL ORGANISM FREE CROPS
 - 4.1.3. GROWTH OF BIO PESTICIDES MARKET
 - 4.1.4. BETTER PRODUCTIVITY AND TIMELINESS
 - 4.1.5. REDUCING ARABLE LAND FOR FARMING
- 4.2. MARKET RESTRAINTS
 - 4.2.1. CAUSES EXTINCTION OF SOME BENEFICIAL SPECIES
 - 4.2.2. RESISTANCE DEVELOPED BY SOME PESTS
 - 4.2.3. NEGATIVE EFFECTS ON HUMAN HEALTH.
 - 4.2.4. BAN BY REGULATORY AUTHORITIES
- 4.3. MARKET OPPORTUNITIES
 - 4.3.1. ENSURES ENVIRONMENT SAFETY
 - 4.3.2. PER HECTARE YIELD INCREASED

4.3.3. RISING FOOD PRICES

4.4. MARKET CHALLENGES

4.4.1. EVOLUTION OF BIOTECHNOLOGY

4.4.2. STRICT RULES AND LAWS

5. MARKET SEGMENTATION

5.1. GLOBAL CROP PROTECTION CHEMICALS MARKET BY ORIGIN

5.1.1. SYNTHETIC CROP PROTECTION CHEMICALS

5.1.2. NATURAL CROP PROTECTION CHEMICALS

5.2. GLOBAL CROP PROTECTION CHEMICALS MARKET BY TYPE

5.2.1.1. HERBICIDES

5.2.1.2. INSECTICIDES

5.2.1.3. FUNGICIDES

5.3. GLOBAL CROP PROTECTION CHEMICALS MARKET BY TARGET CROP TYPE

5.3.1. CROP PROTECTION CHEMICALS IN CROP TYPES

5.3.1.1. CROP PROTECTION CHEMICALS IN GRAINS & CEREALS

5.3.1.2. CROP PROTECTION CHEMICALS IN OIL SEEDS

5.3.1.3. CROP PLIST OF FIGURES

1. CROP PROTECTION CHEMICALS MARKET SEGMENTATION

2. KEY DATA FROM SECONDARY SOURCES

3. KEY DATA FROM PRIMARY SOURCES

4. GLOBAL CROP PROTECTION MARKET GROWTH 2016-2023 (\$MILLION)

5. GLOBAL CROP PROTECTION MARKET BY GEOGRAPHY \$ MILLION (2016-2023)

6. FOOD INSECURITY, MALNUTRITION AND POVERTY ARE DEEPLY INTERRELATED PHENOMENA

7. NEED FOR ORGANIC FARMING

8. DISTRIBUTION OF ORGANIC FARMLAND BY REGION, 2014

9. NEGATIVE EFFECTS OF PESTICIDES ON HUMAN HEALTH

10. ADVANTAGES OF PESTICIDES ON ENVIRONMENT

11. PER CAPITA ARABLE LAND (HA)

12. ACTS RELATED TO REGULATION OF SYNTHETIC PESTICIDES

13. GLOBAL CROP PROTECTION MARKET BY REGIONS 2016

14. PESTICIDES CONSUMPTION IN BRAZIL 2011-2014 (TONS)

15. PESTICIDES USE IN BRAZIL 2015

16. CONSUMPTION OF PESTICIDES IN U.S. (\$MILLION)

17. VALUE OF AGRICULTURE CHEMICAL EXPORT AND IMPORT 2010-2015 (\$MILLION)

18. KEY MOTIVATORS, RESTRAINTS AND OPPORTUNITIES OF ASIA PACIFIC REGION

19. CONSUMPTION OF PESTICIDE IN VARIOUS COUNTRIES OF APAC IN 2014 (IN KG/HA)

20. PRODUCTION OF CHEMICAL PESTICIDE IN CHINA FROM JUNE 2015-16 (THOUSAND TONS)

21. PRODUCTION OF PESTICIDES IN INDIA 2010-2015 (THOUSAND MILLION TONS)

22. EXPORT AND IMPORT OF PESTICIDES IN INDIA (THOUSAND MILLION TONS)

23. CROP PROTECTION CHEMICALS MARKET: PORTER'S MODEL

24. KEY BENEFITS OF CROP PROTECTION CHEMICALS

25. SALE OF ORGANIC ITEMS IN US, 2014 (\$BILLION)

26. FIGURE: TOP THREE EMERGING COUNTRIES 2016-2023 (\$MILLION)

27. MARKET SHARE 2015

28. KEY BUYING CRITERIA

**29. OTHER FACTORS AFFECTING THE BUYING BEHAVIOR OF CROP
PROTECTION CHEMICALS CUSTOMERS**

30. ATTRACTIVE INVESTMENT PROPOSITION BY REGION 2015

List Of Tables

LIST OF TABLES

1. GLOBAL CROP PROTECTION CHEMICAL MARKET BY TYPE 2016-2023 (\$MILLION)

2. FOUR DIMENSIONS OF FOOD SECURITY

3. THE INTEGRATED FOOD SECURITY PHASE CLASSIFICATION (IPC)

4. BENEFITS OF BIOPESTICIDES

5. PESTICIDES BANNED BY REGULATORY AUTHORITIES

6. STRINGENT PESTICIDE REGULATIONS IN INDIA.

7. GLOBAL CROP PROTECTION CHEMICALS MARKET ON THE BASIS OF TYPE 2016 -2023 (\$MILLION)

8. ADVANTAGES AND DISADVANTAGES OF SYNTHETIC AGRICHEMICALS

9. GLOBAL CROP PROTECTION CHEMICALS MARKET ON THE BASIS OF SYNTHETIC CROP PROTECTION CHEMICALS BY GEOGRAPHY 2014-2022 (\$MILLIONS)

10. GLOBAL CROP PROTECTION CHEMICALS MARKET ON THE BASIS OF NATURAL CROP PROTECTION CHEMICALS BY GEOGRAPHY 2014 -2022 (\$MILLION)

11. COMMON APPLICATIONS AND MODE OF ACTION OF MOSTLY USED HERBICIDES IN THE U.S.

12. GLOBAL HERBICIDES MARKET 2016 -2023, BY REGION (\$MILLION)

13. TYPES OF INSECTICIDES AND THEIR MODE OF ACTION

14. GLOBAL INSECTICIDES MARKET BY GEOGRAPHY 2016 -2023 (\$MILLION)

15. GLOBAL FUNGICIDES MARKET BY GEOGRAPHY 2016 -2023 (\$MILLION)**16. GLOBAL CROP BASED CROP PROTECTION CHEMICALS MARKET BY TYPES
2016-2023 (\$ MILLION)****17. GLOBAL CROP PROTECTION CHEMICALS MARKET FOR OILSEEDS
2016-2023 (\$ MILLION)****18. GLOBAL CROP PROTECTION CHEMICALS MARKET FOR FRUITS AND
VEGETABLES 2016-2023 (\$ MILLION)****19. GLOBAL CROP PROTECTION CHEMICALS MARKET IN NON-CROP,
2016-2023 (\$ MILLION)****20. GLOBAL CROP PROTECTION CHEMICALS MARKET IN TURFS AND
ORNAMENTS, 2016-2023 (\$ MILLION)****21. GLOBAL CROP PROTECTION MARKET BY REGION (\$MILLION)****22. LATIN AMERICA: CROP PROTECTION CHEMICAL MARKET PROTECTION
CHEMICALS IN FRUITS & VEGETABLES****5.3.2. CROP PROTECTION CHEMICALS IN NON-CROPS****5.3.2.1. CROP PROTECTION CHEMICALS IN TURF & ORNAMENTALS****6. GEOGRAPHIC ANALYSIS****6.1. LATIN AMERICA****6.1.1. BRAZIL****6.1.2. ARGENTINA****6.1.3. MEXICO****6.1.4. OTHERS****6.2. NORTH AMERICA****6.2.1. U.S.****6.2.2. CANADA****6.3. EUROPE****6.3.1. U.K.****6.3.2. GERMANY**

- 6.3.3. FRANCE
- 6.3.4. SPAIN
- 6.3.5. ITALY
- 6.3.6. REST OF EUROPE
- 6.4. ASIA PACIFIC
 - 6.4.1. CHINA
 - 6.4.2. INDIA
 - 6.4.3. SOUTH KOREA
 - 6.4.4. JAPAN
 - 6.4.5. AUSTRALIA
 - 6.4.6. REST OF ASIA PACIFIC
- 6.5. REST OF THE WORLD

7. KEY ANALYTICAL FINDINGS

- 7.1. PORTER'S 5 FORCES ANALYSIS
 - 7.1.1. THREAT OF NEW ENTRANTS
 - 7.1.2. THREAT OF SUBSTITUTE PRODUCTS OR SERVICES
 - 7.1.3. BARGAINING POWER OF BUYERS
 - 7.1.4. BARGAINING POWER OF SUPPLIERS
 - 7.1.5. INTENSITY OF COMPETITIVE RIVALRY
- 7.2. KEY FINDINGS
 - 7.2.1. TOP 3 EMERGING COUNTRIES
 - 7.2.2. TOP 3 REVENUE GENERATING SEGMENTS
 - 7.2.3. MARKET TRENDS
 - 7.2.4. PIPELINE ANALYSIS
- 7.3. R & D SCENARIO
- 7.4. COMPETITIVE INTELLIGENCE
 - 7.4.1. MARKET SHARE ANALYSIS
 - 7.4.2. TOP WINNING STRATEGIES
 - 7.4.3. CASE STUDY; TOP COMPETITIVE MOVES
- 7.5. KEY BUYING CRITERIA
- 7.6. STRATEGIC RECOMMENDATION
- 7.7. STRATEGIC CONCLUSION

8. COMPANY PROFILES

- 8.1. FMC CORPORATION
 - 8.1.1. OVERVIEW

- 8.1.2. PRODUCT PORTFOLIO:
- 8.1.3. SCOT ANALYSIS
- 8.1.4. STRATEGIC INITIATIVES
- 8.2. NOVOZYMES
 - 8.2.1. OVERVIEW
 - 8.2.2. PRODUCT PORTFOLIO
 - 8.2.3. SCOT ANALYSIS
 - 8.2.4. STRATEGIC INITIATIVES
- 8.3. NUFARM
 - 8.3.1. OVERVIEW
 - 8.3.2. PRODUCT PORTFOLIO
 - 8.3.3. SCOT ANALYSIS
 - 8.3.4. STRATEGIC INITIATIVE
- 8.4. SUMITOMO CHEMICAL
 - 8.4.1. OVERVIEW
 - 8.4.2. PRODUCT PORTFOLIO
 - 8.4.3. SCOT ANALYSIS
 - 8.4.4. STRATEGIC INITIATIVE
- 8.5. VALENT BIOSCIENCES
 - 8.5.1. OVERVIEW
 - 8.5.2. PRODUCTPORTFOLIOPORTFILIO
 - 8.5.3. SCOT ANALYSIS
 - 8.5.4. STRATEGIC MOVES
- 8.6. ADAMA AGRICULTURAL SOLUTIONS
 - 8.6.1. OVERVIEW
 - 8.6.2. PRODUCT PORTFOLIOPORTFILIO
 - 8.6.3. SCOT ANALYSIS
 - 8.6.4. STRATEGIC MOVES
- 8.7. AGRIUM
 - 8.7.1. OVERVIEW
 - 8.7.2. PRODUCT PORTFOLIO
 - 8.7.3. SCOT ANALYSIS
 - 8.7.4. STRATEGIC MOVES
- 8.8. ARYSTA LIFESCIENCE
 - 8.8.1. OVERVIEW
 - 8.8.2. PRODUCT PORTFOLIO
 - 8.8.3. SCOT ANALYSIS
 - 8.8.4. STRATEGIC MOVES
- 8.9. DUPONT

- 8.9.1. OVERVIEW
- 8.9.2. PRODUCT PORTFOLIO
- 8.9.3. SCOT ANALYSIS
- 8.9.4. STRATEGIC MOVES
- 8.10. BASF
 - 8.10.1. OVERVIEW
 - 8.10.2. PRODUCT PORTFOLIO
 - 8.10.3. SCOT ANALYSIS
 - 8.10.4. STRATEGIC MOVES
- 8.11. BAYER CROPSCIENCE
 - 8.11.1. OVERVIEW
 - 8.11.2. PRODUCT PORTFOLIO
 - 8.11.3. SCOT ANALYSIS
 - 8.11.4. STRATEGIC MOVES
- 8.12. DOW AGROSCIENCES
 - 8.12.1. OVERVIEW
 - 8.12.2. PRODUCT PORTFOLIO
 - 8.12.3. SCOT ANALYSIS
 - 8.12.4. STRATEGIC MOVES
- 8.13. MONSANTO
 - 8.13.1. OVERVIEW
 - 8.13.2. PRODUCT PORTFOLIO
 - 8.13.3. SCOT ANALYSIS
 - 8.13.4. STRATEGIC MOVES
- 8.14. SYNGENTA
 - 8.14.1. OVERVIEW
 - 8.14.2. PRODUCT PORTFOLIO
 - 8.14.3. SCOT ANALYSIS
 - 8.14.4. STRATEGIC MOVES
- 8.15. CHEMINOVA

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