GLOBAL CROP PROTECTION MARKET FORECAST 2016-2023

https://marketpublishers.com/r/G8B9086F164EN.html
Date: April 2017
Pages: 148
Price: US$ 3,950.00 (Single User License)
ID: G8B9086F164EN

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.

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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 are 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.

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