

# **Agricultural Fumigants Market by Product Type (Methyl Bromide, Phosphine, Chloropicrin), Crop Type (Cereals, Oilseeds, Fruits), Application (Soil, Warehouse), Pest Control Method (Tarpaulin, Non-Tarp, Vacuum), and Region - Global Forecast to 2026**

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## **Abstracts**

The overall agricultural fumigants market is projected to grow from USD 2.2 billion in 2021 to USD 2.7 billion by 2026, at a CAGR of 4.2%. The growth of the agricultural fumigants market is driven by the advancements in pesticide formulations and the need to avoid losses caused during post-harvest. The continuous and extensive use of chemical compounds to eliminate or reduce pest infestation in soil or stored grains has led to the production of premium quality food products which has international acceptance.

“The chloropicrin segment, by product type, is projected to witness the fastest growth in the market during the forecast period.”

On the basis of product type, the agricultural fumigants market is classified into methyl bromide, phosphine, chloropicrin, metam sodium, 1,3-dichloropropene, and others. Out of these, chloropicrin is projected to grow at the fastest CAGR of 4.5% due to its multifunctional nature in controlling various pests such as nematodes, weed, insects, bacteria, and soil-borne fungus diseases along with leaving the agricultural produce residue-free. It finds its application as a soil fumigant as it has the capability to affect all the targeted as well as non-targeted microorganisms.

“The tarpaulin fumigation segment accounted for the largest share in 2020.”

Based on the pest control method used by agricultural fumigant professionals, tarpaulin

fumigation methods is observed to hold the dominant share in the agricultural fumigants market. The use of tarpaulin is widespread due to their relatively low cost; simplicity of application; effectiveness; availability; and prevents leakage of gas. Further, tailored covers are also used where the overlapping of sheets is inconvenient with the help of trained professionals. These factors contribute to the growth of tarpaulin fumigation segment.

“The warehouse segment, by application, is projected to grow at the highest CAGR during the forecast period.”

Based on application, warehouse segment is projected to grow with the highest CAGR for the forecast period of 2021-2026. Most of the farmers tend to store their produce in their houses or warehouses in order to sell them when they get a good price. Therefore, bags or commodities stored in the warehouse requires fumigation of the entire stack of commodities to prevent damage by insects to the uninfested stacks. Agricultural fumigants ensure the complete eradication of pests causing damage to the stored agricultural commodities and can be further exported or sold retaining good quality.

“High growth is projected in the Asia Pacific agricultural fumigants market.”

The Asia Pacific market is projected to be the fastest-growing market for the period considered for this study due to the strong potential for growth, given the increase in agriculture production and the increasing need for agricultural fumigants with rising warehouses in countries like China and India. In addition, service providers and fumigant suppliers are looking toward the Asia Pacific region due to the increasing pest awareness among consumers and are seeking to expand their influence in the markets through joint ventures and acquisitions.

Break-up of Primaries:

By Company Type: Tier 1 - 50%, Tier 30%, and Tier 20%

By Designation: Manager level - 60%, C-Level - 15%, and Others\* - 25%

By Region: Asia Pacific – 40%, Europe - 30%, Americas - 20%, and RoW\* - 10%

\*RoW includes South America, the Middle East, and Africa.

Leading players profiled in this report:

BASF SE (Germany)

Syngenta (Switzerland)

ADAMA (Israel)

ARKEMA (Germany)

Nufarm (Australia)

Solvay (Belgium)

Tessenderlo Kerley, Inc. (Belgium)

SGS SA (Switzerland)

UPL (India)

AMVAC (US)

Trinity Manufacturing, Inc. (Germany)

Douglas products (US)

Intertek (UK)

Nippon Chemical Industrial Co., LTD. (Japan)

DEGESCH America, Inc. (US)

MustGrow Biologics, Inc (Canada)

Royal Agro (India)

Imtrade CropScience (Australia)

The Draslovka Group (Australia)

Douglas Products (US)

Ecotec Fumigation (Argentina)

#### Research Coverage:

The report segments the agricultural fumigants market on the basis of product type, agricultural fumigants method, crop type, application, form, function, and region. In terms of insights, this report has focused on various levels of analyses—the competitive landscape, end-use analysis, and company profiles, which together comprise and discuss views on the emerging & high-growth segments of the global agricultural fumigants, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

#### Reasons to buy this report:

To get a comprehensive overview of the agricultural fumigants market

To gain wide-ranging information about the top players in this industry, their product portfolios, and key strategies adopted by them

To gain insights about the major countries/regions in which the agricultural fumigants market is flourishing

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TABLE 193 INDIA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2015–2020 (USD MILLION)

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TABLE 202 JAPAN: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2021–2026 (USD MILLION)

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12.4.4.1 Climate change has provided a conducive environment for the growth of invasive pests

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TABLE 214 AUSTRALIA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY APPLICATION, 2021–2026 (USD MILLION)

TABLE 215 AUSTRALIA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2015–2020 (USD MILLION)

TABLE 216 AUSTRALIA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2021–2026 (USD MILLION)

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12.4.5.1 Research is being conducted to replace methyl bromide with other alternatives

TABLE 217 NEW ZEALAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2015–2020 (USD MILLION)

TABLE 218 NEW ZEALAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2021–2026 (USD MILLION)

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TABLE 221 NEW ZEALAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY APPLICATION, 2015–2020 (USD MILLION)

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TABLE 224 NEW ZEALAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2021–2026 (USD MILLION)

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12.4.6.1 Need to avoid post-harvest losses to create a demand for fumigation



TABLE 225 THAILAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2015–2020 (USD MILLION)

TABLE 226 THAILAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2021–2026 (USD MILLION)

TABLE 227 THAILAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY CROP TYPE, 2015–2020 (USD MILLION)

TABLE 228 THAILAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY CROP TYPE, 2021–2026 (USD MILLION)

TABLE 229 THAILAND: AGRICULTURAL FUMIGANTS MARKET SIZE, BY APPLICATION, 2015–2020 (USD MILLION)

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12.4.7.1 Growing economies have created a market for high agricultural inputs

TABLE 233 REST OF APAC: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2015–2020 (USD MILLION)

TABLE 234 REST OF APAC: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2021–2026 (USD MILLION)

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TABLE 245 ROW: AGRICULTURAL FUMIGANTS MARKET SIZE, BY CROP TYPE, 2015–2020 (USD MILLION)

TABLE 246 ROW: AGRICULTURAL FUMIGANTS MARKET SIZE, BY CROP TYPE, 2021–2026 (USD MILLION)

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TABLE 249 ROW: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2015–2020 (USD MILLION)

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12.5.1.1 Government regulations and hygiene requirements to drive the demand for agricultural fumigation

TABLE 251 AFRICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2015–2020 (USD MILLION)

TABLE 252 AFRICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2021–2026 (USD MILLION)

TABLE 253 AFRICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY CROP TYPE, 2015–2020 (USD MILLION)

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TABLE 255 AFRICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY APPLICATION, 2015–2020 (USD MILLION)

TABLE 256 AFRICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY APPLICATION, 2021–2026 (USD MILLION)

TABLE 257 AFRICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2015–2020 (USD MILLION)

TABLE 258 AFRICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2021–2026 (USD MILLION)

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TABLE 260 SOUTH AMERICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2021–2026 (USD MILLION)

TABLE 261 SOUTH AMERICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY CROP TYPE, 2015–2020 (USD MILLION)

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TABLE 264 SOUTH AMERICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY APPLICATION, 2021–2026 (USD MILLION)

TABLE 265 SOUTH AMERICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2015–2020 (USD MILLION)

TABLE 266 SOUTH AMERICA: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PEST CONTROL METHOD, 2021–2026 (USD MILLION)

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##### 12.5.4.1 Change in climate conditions to increase the prevalence of insects

TABLE 267 MIDDLE EAST: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2015–2020 (USD MILLION)

TABLE 268 MIDDLE EAST: AGRICULTURAL FUMIGANTS MARKET SIZE, BY PRODUCT TYPE, 2021–2026 (USD MILLION)

TABLE 269 MIDDLE EAST: AGRICULTURAL FUMIGANTS MARKET SIZE, BY CROP TYPE, 2015–2020 (USD MILLION)

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