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Crop Oil Concentrates Market by Application (Herbicides, Insecticides, and Fungicides), Crop Type (Cereals & grains, Oilseeds & Pulses, and Fruits & Vegetables), Surfactant Concentration, and Region - Global Forecast to 2025

https://marketpublishers.com/r/C50B38B11EFEN.html
Date: July 2019
Pages: 141
Price: US$ 5,650.00 (Single User License)
ID: C50B38B11EFEN

Abstracts

“The crop oil concentrates market is projected to grow at a CAGR of 4.1%, in terms of value. The key drivers include the emergence of high surfactant oil concentrate and the need to reduce the pesticide application rate per hectare.”

The crop oil concentrates market is estimated to be valued at USD 199 million in 2019 and is projected to grow at a CAGR of 4.1%, recording a value of USD 254 million by 2025. The growth of the crop oil concentrates market is driven by the increase in adoption of glyphosate-tolerant crops, growing market for generic pesticides that would require the application of tank-mix adjuvants, and the increase in the need to reduce the pesticide application rate per hectare. However, fluctuations in petroleum oil prices and increasing competition from vegetable-derived oil concentrate manufacturers inhibit the growth of the crop oil concentrates market during the forecast period.

“The fungicides segment in the crop oil concentrates market is projected to record the second-fastest CAGR during the forecast period.”

COCs are a type of adjuvant added majorly to pesticides, to change the surface tension of the pesticide product and facilitate better penetrating property. Based on the pesticides treated with these products, this study segments the global market on the basis of applications such as herbicides, fungicides, insecticides, and others.

Fungi can adversely affect the quality and the yield of agriculture. Majority of the

fungicides available in the market are used for a broad spectrum of fungi species and can be used for a variety of crops. According to industry experts, after herbicides, the fungicides segment is the second-largest segment for COCs. COCs are mainly added to a fungicide formulation, to ensure that powders are easily wettable and well-dispersed in the spray tank.

“Oilseeds & pulses segment held the second-largest share, on the basis of crop type, in the crop oil concentrates market.”

Crops such as soybean, cotton, canola, and sunflower witness high demand in developing countries due to its increasing consumption and importance as cash crops for industrial purposes. According to the FAO, oil crop production such as cottonseed, copra, and palm kernels have grown by 9.0%, 9.1%, and 5.9%, respectively, from 2017 to 2018. This rising production of these crops has led to an increase in demand for COCs, which is enhancing productivity in every harvesting cycle.

South America and Asia Pacific are the major producers of oilseeds, such as soybean, sunflower, and cotton. The application of COCs on oilseeds & pulses is lower in the Asia Pacific region as compared to South America due to the limited pesticide application on these crops. However, the cotton segment is witnessing significant growth among these crops in the Asia Pacific region due to the increasing need for herbicide application on genetically modified cotton crops. According to industry experts, oilseed accounts for 31% of the market share in the US agrochemical market. North America also holds a significant share of the oilseeds market due to the increasing production of soybean in the US. Furthermore, groundnut is witnessing an increase in harvesting area in North America due to its rising consumption.

“High growth is projected to be witnessed in the South America crop oil concentrates market during the forecast period.”

The South America region is projected to be the fastest-growing market during the forecast period. The market growth in the South American region is driven by the increasing adoption of biotech crops, particularly, glyphosate-tolerant corn and soybean. In addition, the regulatory frameworks for adjuvants are quite inconsistent in this region as compared to North America and Europe. Hence, industry players are tapping this market for launching new adjuvants, including COCs.

Break-up of Primaries:

By Company Type: Tier 1 - 55 %, Tier 2 - 30%, and Tier 3 – 15%

By Designation: C-level - 30%, D-level - 20%, and Others*- 50%

By Region: Asia Pacific - 30%, South America – 15%, North America- 25%, Europe- 15%, and RoW - 15%

*Others include sales managers, marketing managers, and product managers.

Leading players profiled in this report:

Wilbur-Ellis Holdings, Inc. (US)

Croda International Plc (UK)

BASF (Germany)

Winfield United (US)

KALO, Inc. (US)

Brandt Consolidated, Inc. (US)

Innvictis Crop Care (US)

CHS, Inc. (US)

Precision Laboratories, LLC (US)

Helena Agri-Enterprises, LLC (US)

Nutrien Ag Solutions (US)

Plant Health Technologies (US)

Research Coverage:

The report segments the crop oil concentrates market on the basis of application, crop type, surfactant concentration, and region. In terms of insights, this report focuses 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 crop oil concentrates market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

Reasons to buy this report:

- To get a comprehensive overview of the crop oil concentrates 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 crop oil concentrates market is flourishing

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