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Nematicide Market by Type (Chemical, Biologicals), Nematode Type (Root-Knot, Cyst, Lesion), Mode of Application (Drenching, Soil Dressing, Seed Treatment, Fumigation), Formulation, Crop Type, and Region - Global Forecast to 2027

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Abstracts

The global nematicide market is estimated to be valued at USD 1.9 billion in 2022. It is projected to reach USD 3.0 billion by 2027, recording a CAGR of 9.9 % during the forecast period. Plant-parasitic nematodes are a major biotic stress in successful crop cultivation, their productivity and the overall crop production. Besides in?icting direct losses in crop yields, plant-parasitic nematodes also play a significant role in disease complexes involving other pathogens.

Across the globe, the market for nematicides is governed by regulatory bodies. While regions such as the Asia Pacific do not have a strong regulatory framework for monitoring the introduction and use of these nematicides, European legislation for pesticides is stringent, due to which an array of hazardous chemicals have been phased out. The widespread adoption of organic farming and sustainable farming practices has aided in the growth of the market on a global level. This has allowed for the adoption of bionematicides. With the growing focus on better quality and yield from crops, seed treatment has also become a major area of focus.

“The North America region is estimated to record a CAGR of 9.4 % during the forecast period.”

The North American market is projected to rule the global nematicides market over the forecast period due to the dwindling amount of arable land and rising need for food. The use of new farming practices is also anticipated to increase demand for nematicides in

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this region. As a result, it is anticipated that the market would expand over the course of the projected period as a result of increasing global demand for nematodes made from biological sources and an increase in nematode infestation in crops. The growing international demand for crops such as soybean and corn has increased the scope for the use of nematicides in the North America.

The Asia-pacific region accounted for the fastest growing market share of 23.3 % in 2021 and is projected to grow at a CAGR of 6.8 % during the forecast period. Favorable agricultural policies pertaining to food security, hygiene, and quality have widened the application of nematicides in the Asia-pacific region. In countries such as the US, the adoption of drip irrigation mode of application is high. This has increased efficiency in the delivery of nematicides through the agricultural fields, which grow crops such as soybean and corn.

“Soil dressing mode of application had the largest market share of 33.8 % in 2021 and is projected to grow at a CAGR of 9.5 % by 2027.”

The soil is dressed either in a dry formulation or wet treated with a slurry or liquid formulation. Soil dressing involves the application of nematicides near the root zone of the infected crop. Nematicides are applied in ring formation near the root zone as a part of the soil dressing method. Since the method of dressing is labor-intensive, it is popular in the Asia Pacific region, as opposed to the North American region, where the economy is more capital-intensive. FMC Corporation (US), ADAMA Agricultural Solutions (Israel), and Bayer (Germany) are some of the major companies providing nematicides in the granular form in this region.

“The fruits & vegetables segment is projected to grow at the highest CAGR of 10.7 % during the forecast period.”

Fruits and vegetables are high-value crops grown on a large scale in greenhouses and open fields. Due to an increase in nematode infection on many commodities, including carrots, potatoes, and tomatoes, the vegetable segment currently occupies a majority share in the market. Nematode-infected roots become damaged and deformed, which lowers the product's quality and yield. Nematodes also intensify the negative effects of bacteria and fungi. Nematicides are therefore used by vegetable growers to control worms and avoid crop losses. The need for bio-based nematicides is expected to rise over the coming years as farmers increasingly want to raise organic fruits, vegetables, and cereals. The need for huge investment in crop production, and a change in food consumption habits has urged the growers to shift to specialty crop production. For

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instance, according to The Economic Times, an Indian origin newspaper, the export demand for vegetables has increased by roughly 20% in the first quarter of 2020-21 compared to the pre-covid level (2019). Moreover, according to Vegetable Growers Weekly, a US-based news magazine, fresh produce such as frozen fruits and vegetables, shelf-stable fruits, and shelf-stable vegetables generated $7.1 billion in sales in May 2021, up to $790 million from the previous year. Therefore, the increasing demand for high-value crops is driving the growth of the nematicides market.

Through the years, growth in urban population, has led to the increase in demand for fresh fruits and vegetables. There is an increase in the loss of fruits and vegetable production in the Asia Pacific, due to the increased instances of insect pest outbreaks. According to FAO, 20–25% of the harvest produce is decayed by pathogens during postharvest handling, especially in developing countries. Countries such as China and India export a large share of fruits produced to various countries. The appearance plays a significant role in the marketability of fruits and vegetables. The quality of the product tends to be assumed based on the appearance.

Break-up of Primaries:

By Company Type: Tier 1 – 40.0%, Tier 2- 30.0%, Tier 3 – 30.0%

By Designation: Managers – 40.0%, CXOs – 25.0%, and Executives- 35.0%

By Region: Europe - 50%, Asia Pacific – 30%, North America - 10%, RoW – 10%

Leading players profiled in this report:

BASF SE (Germany)

Isagro s.p.a (Italy)

CORTEVA AGRISCIENCE (US)

SYNGENTA AG (Switzerland)

BAYER AG (Germany)

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UPL LIMITED (India)

American vanguard corporation (US)

Nufarm (Australia)

FMC CORPORATION (US)

Chr. Hansen (Denmark)

ADAMA agricultural solutions ltd (Israel)

MARRONE BIO INNOVATIONS (US)

VALENT BIOSCIENCES LLC (US)

CERTIS biologicals (US)

T. STANES & COMPANY LIMITED (India)

AGRI LIFE (India)

BIO HUMA NETICS, INC (US)

REAL IPM KENYA (Kenya)

HORIZON GROUP (India)

CROP IQ TECHNOLOGY LTD (UK)

VARSHA BIOSCIENCE AND TECHNOLOGY INDIA PRIVATE LIMITED (India)

PHERONYM (US)

VIVE CROP PROTECTION (Canada)

TELLURIS BIOTECH INDIA PRIVATE LIMITED (India)

ECOWIN (Republic of Korea)

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Research Coverage:

The report segments the nematicide market on the basis of type, formulation, nematode type, mode of application, crop type 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 nematicides market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

Reasons to buy this report:

To get a comprehensive overview of the nematicide 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 nematicide market is flourishing

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About

According to a new report "Nematicides Market by Types (Fumigants, Organophosphates, Carbamate and Bio-Nematicides), Applications (Agrochemicals, Industrial, and Others) and Geography (North America, Europe, Asia-Pacific & ROW) - Global Trends & Forecasts to 2019",

Nematicides Market is projected to grow at a healthy CAGR of 3.2% between 2014 and 2019. Bio-nematicides are projected to grow at the highest CAGR of 4.2%, because of the fact it is environmental friendly nature of the products.

The report defines and segments the Nematicides Market with analyses and projections of the market size, in terms of value and volume. The market has been segmented on the basis of types and applications of nematicides. The report also identifies the driving and restraining factors of the global market with analyses of trends, opportunities, winning imperatives, and challenges. The market is segmented and market size is forecasted on the basis of the key regions including North America, Europe, Asia-Pacific (APAC), and Rest of the World (ROW). Key countries are covered and market size and trends are projected for each region.

Nematicide is a type of chemical pesticide used to kill plant-parasitic nematodes. Nematicides have tended to be broad-spectrum toxicants possessing high volatility or other properties for better penetration through the soil. Nematodes are microscopic parasitic roundworms, found in massive quantities virtually everywhere in the soil, water, and inside other plants and animals. Nematicides are primarily available in two different delivery forms, fumigants and contact applications, with a very small portion of product currently in the form of integrated seed treatment. While fumigants are administered several weeks before planting, contact nematicides are applied during planting. As both treatments are equally effective for preventative measures taken before the root system are fully developed.

Regulatory issues are a significant factor in limiting future uses of fumigants and nematicides. Concerns about human health and environmental impacts can lead to the cancellation of registration of products or the phase-out of uses. The cost of re-registration is another limiting factor. Breakthroughs in transgenic seeds for pest-resistance can lead to replacement of fumigants and nematicides in the future. On the other hand, for farmers and growers, competitive advantage is a key to their success. They will continue to use fumigants and nematicides if there is no alternative. For

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example, strawberry growers in California have yet to find a viable alternative to methyl bromide. In addition, improved biofuel technologies could support the growth of crop acreage, thus leading to increase in fumigant and nematicide use.

In, 2013, U.S., France, Brazil, and Japan were the largest Nematicide Markets among countries included in the report. Vegetables constituted the largest crop group, followed by field crops and specialty crops, for the Nematicides Market.

The report also touches on various other important aspects of the market. It includes an analysis of the competitive landscape. In addition, key players of this market have also been profiled.

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