

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

<https://marketpublishers.com/r/N85FD617E77EN.html>

Date: October 2022

Pages: 332

Price: US\$ 4,950.00 (Single User License)

ID: N85FD617E77EN

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 inflicting 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

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

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)

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)

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

Contents

1 INTRODUCTION

1.1 OBJECTIVES

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

FIGURE 1 NEMATICIDES MARKET SEGMENTATION

1.3.1 REGIONAL SEGMENTATION

FIGURE 2 NEMATICIDES MARKET: REGIONAL SEGMENTATION

1.3.2 INCLUSIONS & EXCLUSIONS

1.4 YEARS CONSIDERED

1.5 UNITS CONSIDERED

1.5.1 CURRENCY CONSIDERED

1.5.2 VOLUME UNIT CONSIDERED

1.6 STAKEHOLDERS

1.7 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 3 NEMATICIDES MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Key industry insights

2.1.2.3 Breakdown of primary interviews

FIGURE 4 BREAKDOWN OF PRIMARY INTERVIEWS, BY COMPANY TYPE, DESIGNATION, AND REGION

2.2 MARKET SIZE ESTIMATION

2.2.1 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

FIGURE 5 NEMATICIDES MARKET SIZE ESTIMATION (DEMAND SIDE)

FIGURE 6 NEMATICIDES MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

2.2.2 MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH

FIGURE 7 NEMATICIDES MARKET SIZE ESTIMATION, BY TYPE (SUPPLY SIDE)

FIGURE 8 NEMATICIDES MARKET SIZE ESTIMATION: TOP-DOWN APPROACH

2.3 DATA TRIANGULATION

FIGURE 9 DATA TRIANGULATION

2.4 ASSUMPTIONS

TABLE 2 ASSUMPTIONS

2.5 RESEARCH LIMITATIONS & ASSOCIATED RISKS

TABLE 3 RESEARCH LIMITATIONS & ASSOCIATED RISKS

3 EXECUTIVE SUMMARY

TABLE 4 NEMATICIDES MARKET SNAPSHOT, 2022 VS. 2027

FIGURE 10 NEMATICIDES MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)

FIGURE 11 NEMATICIDES MARKET, BY CROP TYPE, 2022 VS. 2027 (USD MILLION)

FIGURE 12 NEMATICIDES MARKET, BY MODE OF APPLICATION, 2022 VS. 2027 (USD MILLION)

FIGURE 13 NEMATICIDES MARKET, BY NEMATODE TYPE, 2022 VS. 2027 (USD MILLION)

FIGURE 14 NEMATICIDES MARKET, BY FORMULATION, 2022 VS. 2027 (USD MILLION)

FIGURE 15 NEMATICIDES MARKET: REGIONAL SNAPSHOT

4 PREMIUM INSIGHTS

4.1 NEMATICIDES MARKET: BRIEF OVERVIEW

FIGURE 16 GRADUAL PHASE-OUT OF CONVENTIONAL CROP PROTECTION CHEMICALS

4.2 NEMATICIDES MARKET, BY REGION

FIGURE 17 EUROPE: SUSTAINABLE SOURCES FOR CONTROLLING SOILBORNE NEMATODES TO DRIVE NEMATICIDE USAGE

4.3 NEMATICIDES MARKET, BY TYPE

FIGURE 18 HIGH ADOPTION OF SUSTAINABLE AGRICULTURAL TECHNIQUES TO DRIVE BIOLOGICALS SEGMENT

4.4 NEMATICIDES MARKET, BY CROP TYPE

FIGURE 19 INCREASE IN USE OF CARBOFURAN IN FRUITS & VEGETABLES AGAINST NEMATODE INFESTATION

4.5 NEMATICIDES MARKET, BY NEMATODE TYPE

FIGURE 20 HIGH RATE OF ROOT-KNOT NEMATODE INFESTATION IN PLANTS

4.6 NEMATICIDES MARKET, BY MODE OF APPLICATION

FIGURE 21 EASE OF APPLICATION TO DRIVE SOIL DRESSING SEGMENT

4.7 NORTH AMERICA: NEMATICIDES MARKET, BY KEY TYPE & COUNTRY

FIGURE 22 CHEMICALS SEGMENT TO ACCOUNT FOR SIGNIFICANT SHARE IN

NORTH AMERICA

4.8 NEMATICIDES MARKET GROWTH, BY KEY COUNTRY

FIGURE 23 ITALY, US, SPAIN, AND UK TO GROW AT SIGNIFICANT RATES

5 MARKET OVERVIEW

5.1 INTRODUCTION

5.2 MACROINDICATORS

5.2.1 ADOPTION OF PESTICIDES FOR DEFENSE AGAINST PEST ATTACKS

FIGURE 24 PESTICIDE CONSUMPTION, BY REGION, 2017–2020 (TONNES)

5.2.2 FOREIGN DIRECT INVESTMENTS

5.3 GLOBAL CROP LOSSES DUE TO NEMATODES

FIGURE 25 WORLDWIDE AVERAGE MONETARY LOSS OF MAJOR CROPS DUE TO NEMATODES (USD BILLION)

TABLE 5 AVERAGE ANNUAL MONETARY LOSS CAUSED BY PLANT PARASITIC NEMATODES TO ECONOMICALLY IMPORTANT CROPS

FIGURE 26 FREQUENCY OF TYPES OF NEMATODE INFESTATION IN CROPS

5.4 MARKET DYNAMICS

FIGURE 27 NEMATICIDES MARKET DYNAMICS

5.4.1 DRIVERS

5.4.1.1 Strong demand for high-value crops

FIGURE 28 AREA HARVESTED UNDER FRUITS & VEGETABLES, 2017–2020 (MILLION HECTARES)

5.4.1.2 Demand for low-cost crop protection solutions

5.4.1.3 Increasing damage to crop production due to nematode infestations

5.4.2 RESTRAINTS

5.4.2.1 Technological limitations in use of biological products

5.4.2.2 Varying government regulations

5.4.3 OPPORTUNITIES

5.4.3.1 Use of plant-based nematicides in organic agriculture and horticulture

5.4.3.2 Nematodes developing resistance to crop protection chemicals

5.4.4 CHALLENGES

5.4.4.1 Evolution of biotechnology and increasing acceptance of GM crops as alternatives to crop protection chemicals

TABLE 6 MAJOR GM CROP-GROWING COUNTRIES, 2010–2019 (MILLION HECTARES)

5.4.4.2 Lack of awareness and low utilization of biologicals

6 INDUSTRY TRENDS

6.1 OVERVIEW

6.2 TARIFF AND REGULATORY LANDSCAPE

6.2.1 NORTH AMERICA

6.2.1.1 US

6.2.1.2 Canada

6.2.2 EUROPEAN UNION

6.2.2.1 UK

6.2.2.2 France

6.2.2.3 Russia

6.2.2.4 Australia

6.2.3 ASIA PACIFIC

6.2.3.1 India

6.2.3.2 China

6.2.4 SOUTH AMERICA

6.2.4.1 Brazil

6.2.5 MIDDLE EAST

6.2.5.1 Egypt

6.2.5.2 UAE

6.3 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 7 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 8 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 9 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 10 MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

6.4 TRENDS/DISRUPTIONS IMPACTING BUYERS IN NEMATICIDES MARKET

FIGURE 30 GLOBAL CHEMICAL NEMATOCIDE VS. BIONEMATOCIDE USE, 2017–2021

6.5 AVERAGE SELLING PRICES

FIGURE 31 AVERAGE PRICE TRENDS FOR NEMATICIDES, BY REGION, 2017–2021 (USD/KG)

FIGURE 32 AVERAGE PRICE TRENDS FOR NEMATICIDES, BY TYPE, 2017–2021 (USD/KG)

6.6 VALUE CHAIN ANALYSIS

FIGURE 33 MANUFACTURING OF NEMATICIDES CONTRIBUTES MAJOR VALUE

TO OVERALL PRICE OF NEMATICIDE

6.6.1 RESEARCH AND PRODUCT DEVELOPMENT

6.6.2 MATERIAL SOURCING AND ACQUISITION

6.6.3 NEMATICIDE MANUFACTURING

6.6.4 DISTRIBUTION

6.6.5 SALES MANAGEMENT

6.6.6 POST-SALES SERVICES

6.7 MARKET ECOSYSTEM

TABLE 11 NEMATICIDES MARKET ECOSYSTEM

6.8 TECHNOLOGY ANALYSIS

6.8.1 ORGANIC ACID-BASED PLANT EXTRACT BIOCONTROL

6.8.2 REDUCED-RISK NEMATICIDES

6.8.3 SYNGENTA TYMIRIUM

6.8.4 KRUGER SEEDS NEMASTRIKE

6.9 PATENT ANALYSIS

FIGURE 35 NUMBER OF PATENTS APPROVED FOR NEMATICIDES IN GLOBAL MARKET, 2011–2021

FIGURE 36 JURISDICTIONS WITH MOST PATENT APPROVALS FOR NEMATICIDES, 2011–2021

TABLE 12 RECENT PATENTS GRANTED FOR NEMATICIDES

6.10 TRADE ANALYSIS

TABLE 13 IMPORT VALUE OF INSECTICIDES, FUNGICIDES, HERBICIDES, NEMATICIDES, AND PLANT GROWTH REGULATORS FOR KEY COUNTRIES, 2021 (USD THOUSAND)

TABLE 14 EXPORT VALUE OF INSECTICIDES, FUNGICIDES, HERBICIDES, NEMATICIDES, AND PLANT GROWTH REGULATORS FOR KEY COUNTRIES, 2021 (USD THOUSAND)

6.11 KEY CONFERENCES & EVENTS

TABLE 15 NEMATICIDES MARKET: CONFERENCES & EVENTS, 2022–2023

6.12 CASE STUDY ANALYSIS

6.12.1 USE CASE 1: SYNGENTA AG SEEDCARE LAUNCHES VICTRATO

6.12.2 USE CASE 2: BASF'S IRGACYCLE STABILIZES RECYCLED PLASTICS USED TO PROTECT PINEAPPLES FROM SUNBURN IN MALAYSIA

6.13 KEY STAKEHOLDERS & BUYING CRITERIA

6.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 37 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS OF TOP FOUR MODES OF APPLICATION

TABLE 16 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS OF TOP FOUR MODES OF APPLICATION

FIGURE 38 KEY BUYING CRITERIA OF TOP FOUR MODES OF APPLICATION FOR NEMATICIDES

TABLE 17 KEY BUYING CRITERIA FOR TOP FOUR MODES OF APPLICATION FOR NEMATICIDES

6.14 PORTER'S FIVE FORCES ANALYSIS

TABLE 18 PORTER'S FIVE FORCES ANALYSIS

6.14.1 THREAT OF NEW ENTRANTS

6.14.2 THREAT OF SUBSTITUTES

6.14.3 BARGAINING POWER OF SUPPLIERS

6.14.4 BARGAINING POWER OF BUYERS

6.14.5 INTENSITY OF COMPETITIVE RIVALRY

7 NEMATICIDES MARKET, BY TYPE

7.1 INTRODUCTION

FIGURE 39 NEMATICIDES MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 19 NEMATICIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 20 NEMATICIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

7.2 CHEMICALS

7.2.1 LONGER RESIDUAL ACTIVITY AND QUICK MODE OF ACTION AGAINST NEMATODES TO DRIVE SEGMENT

7.2.2 FUMIGANTS

7.2.2.1 Broad spectrum functionality of fumigants against nematodes to positively drive market

TABLE 21 FUMIGANTS APPLIED TO AGRONOMIC CROPS

TABLE 22 FUMIGANTS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 23 FUMIGANTS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 24 FUMIGANTS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 25 FUMIGANTS MARKET, BY TYPE, 2022–2027 (USD MILLION)

7.2.2.1.1 Methyl bromide

7.2.2.1.1.1 Ability to penetrate quickly into sorptive materials at normal atmospheric pressure to drive segment

7.2.2.1.2 Metam sodium

7.2.2.1.2.1 Increase in farmers' education and adoption of metam sodium in agriculture sector to booster market

7.2.2.1.3 1-3-Dichloropropene

7.2.2.1.3.1 Properties such as minimum soil contamination air dispersion to drive segment

7.2.2.1.4 Other fumigants

7.2.3 CARBAMATES

7.2.3.1 Low toxicity to non-target organisms and selective action against nematodes to accelerate segment growth

TABLE 26 CROPS RECEIVING CARBAMATE APPLICATIONS

TABLE 27 CARBAMATES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 28 CARBAMATES MARKET, BY REGION, 2022–2027 (USD MILLION)

7.2.4 ORGANOPHOSPHATES

7.2.4.1 Fast absorption rate of organophosphates to drive market

TABLE 29 ORGANOPHOSPHATES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 30 ORGANOPHOSPHATES MARKET, BY REGION, 2022–2027 (USD MILLION)

7.2.5 OTHER CHEMICALS

TABLE 31 OTHER CHEMICAL NEMATICIDES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 32 OTHER CHEMICAL NEMATICIDES MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3 BIOLOGICALS

7.3.1 STRINGENT REGULATORY POLICIES ON CONVENTIONAL AGROCHEMICALS TO PROPEL SEGMENT GROWTH

TABLE 33 BIOLOGICALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 34 BIOLOGICALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

7.3.2 MICROBIALS

7.3.2.1 High adoption of sustainable agricultural techniques to fuel growth

TABLE 35 MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 36 MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3.3 BIOCHEMICALS

7.3.3.1 Residue-free nematode management by biochemicals to propel growth

TABLE 37 BIOCHEMICALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 38 BIOCHEMICALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3.4 MACROBIALS

7.3.4.1 Natural and unique mode of action and convenient application to spur usage

TABLE 39 MACROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 40 MACROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

8 NEMATICIDES MARKET, BY FORMULATION

8.1 INTRODUCTION

FIGURE 40 NEMATICIDES MARKET, BY FORMULATION, 2022 VS. 2027 (USD

Nematicide Market by Type (Chemical, Biologicals), Nematode Type (Root-Knot, Cyst, Lesion), Mode of Applicatio...

MILLION)

TABLE 41 NEMATICIDES MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 42 NEMATICIDES MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

8.2 GRANULAR

8.2.1 GOOD STORAGE VIABILITY TO DRIVE SEGMENT GROWTH

TABLE 43 GRANULAR NEMATICIDES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 44 GRANULAR NEMATICIDES MARKET, BY REGION, 2022–2027 (USD MILLION)

8.3 LIQUID

8.3.1 GREATER DEGREE OF DISPERSION PROPERTY OFFERED BY LIQUID NEMATICIDES TO DRIVE DEMAND

TABLE 45 LIQUID NEMATICIDES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 46 LIQUID NEMATICIDES MARKET, BY REGION, 2022–2027 (USD MILLION)

9 NEMATICIDES MARKET, BY NEMATODE TYPE

9.1 INTRODUCTION

FIGURE 41 NEMATICIDES MARKET, BY NEMATODE TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 47 MOST COMMON NEMATODE SPECIES

TABLE 48 NEMATICIDES MARKET, BY NEMATODE TYPE, 2017–2021 (USD MILLION)

TABLE 49 NEMATICIDES MARKET, BY NEMATODE TYPE, 2022–2027 (USD MILLION)

9.2 ROOT-KNOT NEMATODES

9.2.1 CONTROL OF ECONOMIC DAMAGE WORTH USD 100 BILLION CAUSED BY ROOT-KNOT NEMATODES TO DRIVE DEMAND

TABLE 50 ROOT-KNOT NEMATODES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 51 ROOT-KNOT NEMATODES MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 52 ROOT-KNOT NEMATODES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 53 ROOT-KNOT NEMATODES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

TABLE 54 ECONOMIC LOSSES IN VEGETABLE CROPS DUE TO ROOT-KNOT NEMATODES

9.3 CYST NEMATODES

9.3.1 LARGE-SCALE ECONOMIC LOSSES AND LOWER YIELD QUALITY DUE TO CYST NEMATODE INFESTATION TO INCREASE DEMAND

TABLE 55 CYST NEMATODES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 56 CYST NEMATODES MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 57 CYST NEMATODES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 58 CYST NEMATODES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

9.4 LESION NEMATODES

9.4.1 WIDE HOST RANGE AND PRESENCE IN TEMPERATE AND TROPICAL ENVIRONMENTS TO DRIVE MARKET

TABLE 59 LESION NEMATODES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 60 LESION NEMATODES MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 61 LESION NEMATODES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 62 LESION NEMATODES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

9.5 OTHER NEMATODE TYPES

TABLE 63 OTHER NEMATODE TYPES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 64 OTHER NEMATODE TYPES MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 65 OTHER NEMATODE TYPES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 66 OTHER NEMATODE TYPES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

10 NEMATICIDES MARKET, BY MODE OF APPLICATION

10.1 INTRODUCTION

FIGURE 42 NEMATICIDES MARKET, BY MODE OF APPLICATION, 2022 VS. 2027 (USD MILLION)

TABLE 67 NEMATICIDES MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 68 NEMATICIDES MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

10.2 FUMIGATION

10.2.1 LOWER COSTS INVOLVED IN FUMIGATION FOR NEMATODE CONTROL TO PROPEL GROWTH

TABLE 69 FUMIGATION MODE MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 70 FUMIGATION MODE MARKET, BY REGION, 2022–2027 (USD MILLION)

10.3 DRENCHING

10.3.1 PRECISE APPLICATION AND DEEP PENETRATION OF NEMATICIDES ON TARGET NEMATODES TO DRIVE DEMAND

TABLE 71 DRENCHING MODE MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 72 DRENCHING MODE MARKET, BY REGION, 2022–2027 (USD MILLION)

10.4 SOIL DRESSING

10.4.1 EFFECTIVE MANAGEMENT OF EARLY SEASON NEMATODE TO DRIVE DEMAND

TABLE 73 SOIL DRESSING MODE MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 74 SOIL DRESSING MODE MARKET, BY REGION, 2022–2027 (USD MILLION)

10.5 SEED TREATMENT

10.5.1 SAFER APPLICATION AND EARLY SEASON PROTECTION AGAINST NEMATODE TO AUGMENT DEMAND

TABLE 75 SEED TREATMENT MODE MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 76 SEED TREATMENT MODE MARKET, BY REGION, 2022–2027 (USD MILLION)

10.6 OTHER MODES OF APPLICATION

TABLE 77 OTHER MODES OF APPLICATION MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 78 OTHER MODES OF APPLICATION MARKET, BY REGION, 2022–2027 (USD MILLION)

11 NEMATICIDES MARKET, BY CROP TYPE

11.1 INTRODUCTION

FIGURE 43 NEMATICIDES MARKET, BY CROP TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 79 NEMATICIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 80 NEMATICIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

11.2 CEREALS & GRAINS

11.2.1 RISE IN CONSUMPTION OF CEREALS & GRAINS TO DRIVE MARKET

TABLE 81 CEREAL & GRAIN CROPS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 82 CEREAL & GRAIN CROPS MARKET, BY REGION, 2022–2027 (USD

MILLION)

TABLE 83 CEREAL & GRAIN CROPS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 84 CEREAL & GRAIN CROPS MARKET, BY TYPE, 2022–2027 (USD MILLION)

11.2.2 CORN

11.2.2.1 Commercial value and vulnerability of corn crop to needle nematodes to drive nematicide demand

TABLE 85 NEMATODE TYPES AFFECTING CORN

11.2.3 WHEAT

11.2.3.1 Severe damage to wheat crop in Asia & Europe due to root-knot and cyst nematodes to drive market

11.2.4 RICE

11.2.4.1 Major global rice export demand and severe yield loss caused due to Meloidogyne graminicola nematodes to drive demand

11.2.5 OTHER CEREALS & GRAINS

11.3 OILSEEDS & PULSES

11.3.1 INCREASE IN CONSUMPTION OF PROTEIN- AND HEALTHY FAT-RICH MEALS TO DRIVE SEGMENT

TABLE 86 OILSEED & PULSE CROPS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 87 OILSEED & PULSE CROPS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 88 OILSEED & PULSE CROPS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 89 OILSEED & PULSE CROPS MARKET, BY TYPE, 2022–2027 (USD MILLION)

11.3.2 SOYBEAN

11.3.2.1 Increase in vegan population and severe crop loss due to infestation from soybean cyst nematodes to drive market

11.3.3 SUNFLOWER

11.3.3.1 Preference for sunflower oil due to its associated heart-related health benefits to drive demand

11.3.4 OTHER OILSEEDS & PULSES

11.4 FRUITS & VEGETABLES

11.4.1 RISE IN EXPORTS OF FRESH, FROZEN, AND PROCESSED FRUITS & VEGETABLES FROM SOUTH ASIA TO DRIVE DEMAND

TABLE 90 FRUIT & VEGETABLE CROPS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 91 FRUIT & VEGETABLE CROPS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 92 FRUIT & VEGETABLE CROPS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 93 FRUIT & VEGETABLE CROPS MARKET, BY TYPE, 2022–2027 (USD MILLION)

11.4.2 POME FRUITS

11.4.2.1 Economic losses caused due to nematode-related complex diseases to drive market

11.4.3 CITRUS FRUITS

11.4.3.1 Severe yield loss caused due to citrus nematodes in citrus fruits to drive nematicides market

11.4.4 LEAFY VEGETABLES

11.4.4.1 Susceptibility of leafy vegetables to needle nematodes and lesion nematodes to drive market

11.4.5 BERRIES

11.4.5.1 Rise in demand for berries in food & beverage, pharmaceutical, and cosmetics industries in US to positively drive market

11.4.6 ROOTS & TUBERS VEGETABLES

11.4.6.1 Severe economic losses due to tuber blemishes caused by nematodes to drive market

11.4.7 OTHER FRUITS & VEGETABLES

11.5 OTHER CROP TYPES

TABLE 94 OTHER CROP TYPES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 95 OTHER CROP TYPES MARKET, BY REGION, 2022–2027 (USD MILLION)

12 NEMATICIDES MARKET, BY REGION

12.1 INTRODUCTION

FIGURE 44 SPAIN TO BE FASTEST-GROWING COUNTRY DURING FORECAST PERIOD

FIGURE 45 EUROPE PROJECTED TO RECORD HIGHEST GROWTH RATE DURING FORECAST PERIOD

TABLE 96 NEMATICIDES MARKET, BY REGION, 2017–2021 (USD MILLION)

12.2 NORTH AMERICA

TABLE 98 NORTH AMERICA: NEMATICIDES MARKET, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 99 NORTH AMERICA: NEMATICIDES MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 100 NORTH AMERICA: NEMATOCIDES MARKET, BY CROP TYPE,
2017–2021 (USD MILLION)

TABLE 101 NORTH AMERICA: NEMATOCIDES MARKET, BY CROP TYPE,
2022–2027 (USD MILLION)

TABLE 102 NORTH AMERICA: NEMATOCIDES MARKET, BY NEMATODE TYPE,
2017–2021 (USD MILLION)

TABLE 103 NORTH AMERICA: NEMATOCIDES MARKET, BY NEMATODE TYPE,
2022–2027 (USD MILLION)

TABLE 104 NORTH AMERICA: NEMATOCIDES MARKET, BY FORMULATION,
2017–2021 (USD MILLION)

TABLE 105 NORTH AMERICA: NEMATOCIDES MARKET, BY FORMULATION,
2022–2027 (USD MILLION)

TABLE 106 NORTH AMERICA: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD
MILLION)

TABLE 107 NORTH AMERICA: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD
MILLION)

TABLE 108 NORTH AMERICA: CHEMICAL NEMATOCIDES MARKET, BY TYPE,
2017–2021 (USD MILLION)

TABLE 109 NORTH AMERICA: CHEMICAL NEMATOCIDES MARKET, BY TYPE,
2022–2027 (USD MILLION)

TABLE 110 NORTH AMERICA: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE,
2017–2021 (USD MILLION)

TABLE 111 NORTH AMERICA: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE,
2022–2027 (USD MILLION)

TABLE 112 NORTH AMERICA: NEMATOCIDES MARKET, BY MODE OF
APPLICATION, 2017–2021 (USD MILLION)

TABLE 113 NORTH AMERICA: NEMATOCIDES MARKET, BY MODE OF
APPLICATION, 2022–2027 (USD MILLION)

12.2.1 US

12.2.1.1 Research undertaken to introduce nematode-resistant vegetables and field
crops

TABLE 114 US: NEMATODE SPECIES AND THEIR PREVALENCE

TABLE 115 US: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 116 US: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 117 US: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD
MILLION)

TABLE 118 US: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD
MILLION)

12.2.2 CANADA

12.2.2.1 Losses in high-value cash crops to drive adoption of nematicides

TABLE 119 CANADA: CROPS INFESTED BY NEMATODES

TABLE 120 CANADA: NEMATICIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 121 CANADA: NEMATICIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 122 CANADA: NEMATICIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 123 CANADA: NEMATICIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.2.3 MEXICO

12.2.3.1 Increase in root-knot and root-lesion nematode infestation in wheat to fuel market

TABLE 124 MEXICO: NEMATICIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 125 MEXICO: NEMATICIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 126 MEXICO: NEMATICIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 127 MEXICO: NEMATICIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.3 EUROPE

FIGURE 47 EUROPE: NEMATICIDES MARKET SNAPSHOT

TABLE 128 EUROPE: NEMATICIDES MARKET, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 129 EUROPE: NEMATICIDES MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 130 EUROPE: NEMATICIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 131 EUROPE: NEMATICIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

TABLE 132 EUROPE: NEMATICIDES MARKET, BY NEMATODE TYPE, 2017–2021 (USD MILLION)

TABLE 133 EUROPE: NEMATICIDES MARKET, BY NEMATODE TYPE, 2022–2027 (USD MILLION)

TABLE 134 EUROPE: NEMATICIDES MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 135 EUROPE: NEMATICIDES MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

TABLE 136 EUROPE: NEMATICIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 137 EUROPE: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 138 EUROPE: CHEMICAL NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 139 EUROPE: CHEMICAL NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 140 EUROPE: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 141 EUROPE: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 142 EUROPE: NEMATOCIDES MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 143 EUROPE: NEMATOCIDES MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

12.3.1 GERMANY

12.3.1.1 Major players investing in agricultural solutions to cater to nematode attacks in field crops

TABLE 144 GERMANY: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 145 GERMANY: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 146 GERMANY: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 147 GERMANY: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.3.2 UK

12.3.2.1 High demand for nematocides since farmers still use traditional farming methods

TABLE 148 UK: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 149 UK: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 150 UK: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 151 UK: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.3.3 FRANCE

12.3.3.1 Extensive government funds in R&D to devise various sustainable methods for nematode control

TABLE 152 FRANCE: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 153 FRANCE: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 154 FRANCE: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 155 FRANCE: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.3.4 SPAIN

12.3.4.1 Increase in government initiatives to encourage use of biological nematocides

TABLE 156 SPAIN: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 157 SPAIN: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 158 SPAIN: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 159 SPAIN: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.3.5 ITALY

12.3.5.1 Changes across entire supply chain with goal of sustainable farming to drive market

TABLE 160 ITALY: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 161 ITALY: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 162 ITALY: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 163 ITALY: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.3.6 NETHERLANDS

12.3.6.1 Stringent regulatory scenario on pesticide usage to fuel market for biological nematocides

TABLE 164 NETHERLANDS: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 165 NETHERLANDS: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 166 NETHERLANDS: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 167 NETHERLANDS: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.3.7 REST OF EUROPE

TABLE 168 REST OF EUROPE: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 169 REST OF EUROPE: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 170 REST OF EUROPE: NEMATOCIDES MARKET, BY CROP TYPE,

2017–2021 (USD MILLION)

TABLE 171 REST OF EUROPE: NEMATOCIDES MARKET, BY CROP TYPE,
2022–2027 (USD MILLION)

12.4 ASIA PACIFIC

TABLE 172 ASIA PACIFIC: NEMATOCIDES MARKET, BY COUNTRY, 2017–2021
(USD MILLION)

TABLE 173 ASIA PACIFIC: NEMATOCIDES MARKET, BY COUNTRY, 2022–2027
(USD MILLION)

TABLE 174 ASIA PACIFIC: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021
(USD MILLION)

TABLE 175 ASIA PACIFIC: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027
(USD MILLION)

TABLE 176 ASIA PACIFIC: NEMATOCIDES MARKET, BY NEMATODE TYPE,
2017–2021 (USD MILLION)

TABLE 177 ASIA PACIFIC: NEMATOCIDES MARKET, BY NEMATODE TYPE,
2022–2027 (USD MILLION)

TABLE 178 ASIA PACIFIC: NEMATOCIDES MARKET, BY FORMULATION, 2017–2021
(USD MILLION)

TABLE 179 ASIA PACIFIC: NEMATOCIDES MARKET, BY FORMULATION, 2022–2027
(USD MILLION)

TABLE 180 ASIA PACIFIC: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD
MILLION)

TABLE 181 ASIA PACIFIC: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD
MILLION)

TABLE 182 ASIA PACIFIC: CHEMICAL NEMATOCIDES MARKET, BY TYPE,
2017–2021 (USD MILLION)

TABLE 183 ASIA PACIFIC: CHEMICAL NEMATOCIDES MARKET, BY TYPE,
2022–2027 (USD MILLION)

TABLE 184 ASIA PACIFIC: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE,
2017–2021 (USD MILLION)

TABLE 185 ASIA PACIFIC: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE,
2022–2027 (USD MILLION)

TABLE 186 ASIA PACIFIC: NEMATOCIDES MARKET, BY MODE OF APPLICATION,
2017–2021 (USD MILLION)

TABLE 187 ASIA PACIFIC: NEMATOCIDES MARKET, BY MODE OF APPLICATION,
2022–2027 (USD MILLION)

12.4.1 CHINA

12.4.1.1 Rise in infestation by root-knot nematodes in crops to propel market

TABLE 188 CHINA: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 189 CHINA: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 190 CHINA: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 191 CHINA: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.4.2 JAPAN

12.4.2.1 Various products catering to long-term viability of crops to drive growth

TABLE 192 JAPAN: MAJOR CROPS INFESTED BY NEMATODES

TABLE 193 JAPAN: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 194 JAPAN: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 195 JAPAN: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 196 JAPAN: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.4.3 INDIA

12.4.3.1 Protected environment in polyhouses to create favorable environment for root-knot nematodes

TABLE 197 INDIA: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 198 INDIA: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 199 INDIA: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 200 INDIA: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.4.4 AUSTRALIA

12.4.4.1 Increase in canola losses due to nematode attacks to support adoption of nematicides

TABLE 201 AUSTRALIA: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 202 AUSTRALIA: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 203 AUSTRALIA: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 204 AUSTRALIA: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.4.5 VIETNAM

12.4.5.1 Favorable agricultural development strategies to drive growth

TABLE 205 VIETNAM: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 206 VIETNAM: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD

MILLION)

TABLE 207 VIETNAM: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 208 VIETNAM: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.4.6 REST OF ASIA PACIFIC

TABLE 209 REST OF ASIA PACIFIC: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 210 REST OF ASIA PACIFIC: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 211 REST OF ASIA PACIFIC: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 212 REST OF ASIA PACIFIC: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.5 SOUTH AMERICA

TABLE 213 SOUTH AMERICA: NEMATOCIDES MARKET, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 214 SOUTH AMERICA: NEMATOCIDES MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 215 SOUTH AMERICA: NEMATOCIDES MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 216 SOUTH AMERICA: NEMATOCIDES MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

TABLE 217 SOUTH AMERICA: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 218 SOUTH AMERICA: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 219 SOUTH AMERICA: NEMATOCIDES MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 220 SOUTH AMERICA: NEMATOCIDES MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

TABLE 221 SOUTH AMERICA: CHEMICAL NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 222 SOUTH AMERICA: CHEMICAL NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 223 SOUTH AMERICA: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 224 SOUTH AMERICA: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 225 SOUTH AMERICA: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 226 SOUTH AMERICA: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.5.1 ARGENTINA

12.5.1.1 Increase in focus on cultivating soybean and corn to boost demand for nematocides

TABLE 227 ARGENTINA: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 228 ARGENTINA: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 229 ARGENTINA: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 230 ARGENTINA: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.5.2 BRAZIL

12.5.2.1 High adoption of GM crops to increase usage of nematocides

TABLE 231 BRAZIL: MOST PRESENT NEMATODE SPECIES

TABLE 232 BRAZIL: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 233 BRAZIL: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 234 BRAZIL: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 235 BRAZIL: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.5.3 CHILE

12.5.3.1 Hampered grape cultivation by *M. ethiopica* nematodes to create need for nematocides

TABLE 236 CHILE: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 237 CHILE: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 238 CHILE: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 239 CHILE: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.5.4 REST OF SOUTH AMERICA

TABLE 240 REST OF SOUTH AMERICA: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 241 REST OF SOUTH AMERICA: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 242 REST OF SOUTH AMERICA: NEMATOCIDES MARKET, BY CROP TYPE,

2017–2021 (USD MILLION)

TABLE 243 REST OF SOUTH AMERICA: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

12.6 REST OF THE WORLD (ROW)

TABLE 244 ROW: NEMATOCIDES MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 245 ROW: NEMATOCIDES MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 246 ROW: NEMATOCIDES MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 247 ROW: NEMATOCIDES MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

TABLE 248 ROW: NEMATOCIDES MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 249 ROW: NEMATOCIDES MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

TABLE 250 ROW: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 251 ROW: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 252 ROW: CHEMICAL NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 253 ROW: CHEMICAL NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 254 ROW: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 255 ROW: BIOLOGICAL NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 256 ROW: NEMATOCIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 257 ROW: NEMATOCIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

TABLE 258 ROW: NEMATOCIDES MARKET, BY NEMATODE TYPE, 2017–2021 (USD MILLION)

TABLE 259 ROW: NEMATOCIDES MARKET, BY NEMATODE TYPE, 2022–2027 (USD MILLION)

12.6.1 MIDDLE EAST

12.6.1.1 Rise in population, high dependency on imports, and yield loss due to nematodes to fuel market

TABLE 260 MIDDLE EAST: NEMATOCIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 261 MIDDLE EAST: NEMATOCIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 262 MIDDLE EAST: NEMATICIDES MARKET, BY CROP TYPE, 2017–2021
(USD MILLION)

TABLE 263 MIDDLE EAST: NEMATICIDES MARKET, BY CROP TYPE, 2022–2027
(USD MILLION)

12.6.2 AFRICA

12.6.2.1 Growth in demand for vegetable crops to drive growth

TABLE 264 SOUTH AFRICA: POPULAR WEED SPECIES AS HOSTS OF ROOT-KNOT NEMATODES

TABLE 265 AFRICA: NEMATICIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 266 AFRICA: NEMATICIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 267 AFRICA: NEMATICIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 268 AFRICA: NEMATICIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

13 COMPETITIVE LANDSCAPE

13.1 OVERVIEW

13.2 SEGMENTAL REVENUE ANALYSIS OF KEY PLAYERS

FIGURE 48 SEGMENTAL REVENUE ANALYSIS OF KEY MARKET PLAYERS, 2017–2021 (USD BILLION)

13.3 MARKET SHARE ANALYSIS, 2021

TABLE 269 NEMATICIDES MARKET SHARE (CONSOLIDATED)

13.4 KEY PLAYER STRATEGIES

13.5 COMPANY EVALUATION QUADRANT (KEY PLAYERS)

13.5.1 STARS

13.5.2 PERVASIVE PLAYERS

13.5.3 EMERGING LEADERS

13.5.4 PARTICIPANTS

FIGURE 49 NEMATICIDES MARKET, COMPANY EVALUATION QUADRANT, 2022 (KEY PLAYERS)

13.5.5 PRODUCT FOOTPRINT

TABLE 270 COMPANY FOOTPRINT, BY FORMULATION

TABLE 271 COMPANY FOOTPRINT, BY TYPE

TABLE 272 COMPANY FOOTPRINT, BY REGION

TABLE 273 OVERALL COMPANY FOOTPRINT

13.6 NEMATICIDES MARKET (STARTUP/SME EVALUATION QUADRANT)

13.6.1 PROGRESSIVE COMPANIES

13.6.2 STARTING BLOCKS

13.6.3 RESPONSIVE COMPANIES

13.6.4 DYNAMIC COMPANIES

FIGURE 50 NEMATICIDES MARKET, COMPANY EVALUATION QUADRANT, 2022
(STARTUPS/SMES)

13.6.5 COMPETITIVE BENCHMARKING

TABLE 274 NEMATICIDES MARKET: DETAILED LIST OF KEY STARTUPS/SMES

TABLE 275 NEMATICIDES MARKET: COMPETITIVE BENCHMARKING OF KEY
STARTUP/SMES

13.7 COMPETITIVE SCENARIO

13.7.1 PRODUCT LAUNCHES

TABLE 276 NEMATICIDES MARKET: PRODUCT LAUNCHES, 2017–2022

13.7.2 DEALS

TABLE 277 NEMATICIDES MARKET: DEALS, 2017–2022

13.7.3 OTHERS

TABLE 278 OTHERS, 2017–2022

14 COMPANY PROFILES

14.1 KEY PLAYERS

(Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments)*

14.1.1 BASF SE

TABLE 279 BASF SE: BUSINESS OVERVIEW

FIGURE 51 BASF SE: COMPANY SNAPSHOT

TABLE 280 BASF SE: NEW PRODUCT LAUNCHES

TABLE 281 BASF SE: DEALS

14.1.2 ISAGRO S.P.A

TABLE 282 ISAGRO S.P.A: BUSINESS OVERVIEW

FIGURE 52 ISAGRO S.P.A: COMPANY SNAPSHOT

TABLE 283 ISAGRO S.P.A: DEALS

14.1.3 CORTEVA AGRISCIENCE

TABLE 284 CORTEVA AGRISCIENCE: BUSINESS OVERVIEW

FIGURE 53 CORTEVA AGRISCIENCE: COMPANY SNAPSHOT

TABLE 285 CORTEVA AGRISCIENCE: NEW PRODUCT LAUNCHES

14.1.4 SYNGENTA AG

TABLE 286 SYNGENTA AG: BUSINESS OVERVIEW

FIGURE 54 SYNGENTA AG: COMPANY SNAPSHOT

TABLE 287 SYNGENTA AG: NEW PRODUCT LAUNCHES

14.1.5 BAYER AG

TABLE 288 BAYER AG: BUSINESS OVERVIEW

FIGURE 55 BAYER AG: COMPANY SNAPSHOT

TABLE 289 BAYER AG: NEW PRODUCT LAUNCHES

TABLE 290 BAYER AG: DEALS

14.1.6 UPL

TABLE 291 UPL: BUSINESS OVERVIEW

FIGURE 56 UPL: COMPANY SNAPSHOT

TABLE 292 UPL: DEALS

14.1.7 AMERICAN VANGUARD CORPORATION

TABLE 293 AMERICAN VANGUARD CORPORATION: BUSINESS OVERVIEW

FIGURE 57 AMERICAN VANGUARD CORPORATION: COMPANY SNAPSHOT

TABLE 294 AMERICAN VANGUARD CORPORATION: DEALS

14.1.8 NUFARM

TABLE 295 NUFARM: BUSINESS OVERVIEW

FIGURE 58 NUFARM: COMPANY SNAPSHOT

TABLE 296 NUFARM: DEALS

14.1.9 FMC CORPORATION

TABLE 297 FMC CORPORATION: BUSINESS OVERVIEW

FIGURE 59 FMC CORPORATION: COMPANY SNAPSHOT

TABLE 298 FMC CORPORATION: NEW PRODUCT LAUNCHES

TABLE 299 FMC CORPORATION: DEALS

14.1.10 CHR. HANSEN

TABLE 300 CHR. HANSEN: BUSINESS OVERVIEW

FIGURE 60 CHR. HANSEN: COMPANY SNAPSHOT

TABLE 301 CHR. HANSEN: DEALS

14.1.11 ADAMA AGRICULTURAL SOLUTIONS LTD.

TABLE 302 ADAMA AGRICULTURAL SOLUTIONS LTD.: BUSINESS OVERVIEW

FIGURE 61 ADAMA AGRICULTURAL SOLUTIONS LTD.: COMPANY SNAPSHOT

TABLE 303 ADAMA AGRICULTURAL SOLUTIONS LTD.: DEALS

14.1.12 MARRONE BIO INNOVATIONS

TABLE 304 MARRONE BIO INNOVATIONS: BUSINESS OVERVIEW

FIGURE 62 MARRONE BIO INNOVATIONS: COMPANY SNAPSHOT

TABLE 305 MARRONE BIO INNOVATIONS: NEW PRODUCT LAUNCHES

14.1.13 T. STANES & COMPANY LIMITED

TABLE 306 T. STANES & COMPANY LIMITED: BUSINESS OVERVIEW

FIGURE 63 T. STANES & COMPANY LIMITED: COMPANY SNAPSHOT

14.1.14 VALENT BIOSCIENCES LLC

TABLE 307 VALENT BIOSCIENCES LLC: BUSINESS OVERVIEW

TABLE 308 VALENT BIOSCIENCES LLC: DEALS

TABLE 309 VALENT BIOSCIENCES LLC: OTHERS

14.1.15 CERTIS BIOLOGICALS

TABLE 310 CERTIS BIOLOGICALS: BUSINESS OVERVIEW

TABLE 311 CERTIS BIOLOGICALS: NEW PRODUCT LAUNCHES

TABLE 312 CERTIS BIOLOGICALS: OTHERS

14.1.16 AGRI LIFE

TABLE 313 AGRI LIFE: BUSINESS OVERVIEW

14.1.17 BIO HUMA NETICS, INC

TABLE 314 BIO HUMA NETICS, INC: BUSINESS OVERVIEW

14.1.18 REAL IPM KENYA

TABLE 315 REAL IPM KENYA: BUSINESS OVERVIEW

14.1.19 HORIZON GROUP

TABLE 316 HORIZON GROUP: BUSINESS OVERVIEW

14.1.20 CROP IQ TECHNOLOGY LTD

TABLE 317 CROP IQ TECHNOLOGY LTD.: BUSINESS OVERVIEW

TABLE 318 CROP IQ TECHNOLOGY LTD.: NEW PRODUCT LAUNCHES

TABLE 319 CROP IQ TECHNOLOGY LTD.: OTHERS

*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

14.2 STARTUPS/SMES/OTHER PLAYERS

14.2.1 VARSHA BIOSCIENCE AND TECHNOLOGY INDIA PRIVATE LIMITED

14.2.2 PHERONYM

14.2.3 VIVE CROP PROTECTION

14.2.4 TELLURIS BIOTECH INDIA PRIVATE LIMITED

14.2.5 ECOWIN

15 ADJACENT & RELATED MARKETS

15.1 INTRODUCTION

15.2 AGRICULTURAL BIOLOGICALS MARKET

15.2.1 LIMITATIONS

15.2.2 MARKET DEFINITION

15.2.3 MARKET OVERVIEW

15.2.4 AGRICULTURE BIOLOGICALS MARKET, BY CROP TYPE

TABLE 320 AGRICULTURAL BIOLOGICALS MARKET, BY CROP TYPE, 2017–2021
(USD MILLION)

TABLE 321 AGRICULTURAL BIOLOGICALS MARKET, BY CROP TYPE, 2022–2027

(USD MILLION)

15.2.4.1 Cereals & Grains

TABLE 322 AGRICULTURAL BIOLOGICALS MARKET FOR CEREALS & GRAINS, BY REGION, 2017–2021 (USD MILLION)

TABLE 323 AGRICULTURAL BIOLOGICALS MARKET FOR CEREALS & GRAINS, BY REGION, 2022–2027 (USD MILLION)

15.2.5 AGRICULTURAL BIOLOGICALS MARKET, BY MODE OF APPLICATION

TABLE 324 AGRICULTURAL BIOLOGICALS MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 325 AGRICULTURAL BIOLOGICALS MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

15.3 BIOPESTICIDES MARKET

15.3.1 LIMITATIONS

15.3.2 MARKET DEFINITION

15.3.3 MARKET OVERVIEW

15.3.4 BIOPESTICIDES MARKET, BY TYPE

TABLE 326 BIOPESTICIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 327 BIOPESTICIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

15.3.4.1 Bioinsecticides

TABLE 328 BIOINSECTICIDES MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 329 BIOINSECTICIDES MARKET, BY TYPE, 2022–2027 (USD MILLION)

15.3.5 BIOPESTICIDES MARKET, BY CROP TYPE

TABLE 330 BIOPESTICIDES MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 331 BIOPESTICIDES MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

15.3.5.1 Cereals & Grains

TABLE 332 CEREAL & GRAIN CROPS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 333 CEREAL & GRAIN CROPS MARKET, BY TYPE, 2022–2027 (USD MILLION)

15.4 BIOLOGICAL SEED TREATMENT MARKET

15.4.1 LIMITATIONS

15.4.2 MARKET DEFINITION

15.4.3 MARKET OVERVIEW

15.4.4 BIOLOGICAL SEED TREATMENT MARKET, BY TYPE

TABLE 334 BIOLOGICAL SEED TREATMENT MARKET, BY TYPE, 2018–2025 (USD MILLION)

15.4.4.1 Microbials

TABLE 335 MICROBIAL MARKET, BY SUBTYPE, 2018–2025 (USD MILLION)

15.4.5 BIOLOGICAL SEED TREATMENT MARKET, BY CROP TYPE

TABLE 336 BIOLOGICAL SEED TREATMENT MARKET, BY CROP TYPE, 2018–2025
(USD MILLION)

15.4.5.1 Corn

TABLE 337 BIOLOGICAL SEED TREATMENT MARKET FOR CORN, BY REGION,
2018–2025 (USD MILLION)

16 APPENDIX

16.1 DISCUSSION GUIDE

16.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

16.3 CUSTOMIZATION OPTIONS

16.4 RELATED REPORTS

16.5 AUTHOR DETAILS

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

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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