

Rodenticides Market by Type (Anticoagulants, Non-Coagulants), Mode of Application (Pellets, Spray, and Powder), End Use (Agriculture, Warehouses, Urban Centers), Rodent Types (Rats, Mice, Chipmunks, Hamsters) & Region - Global Forecast to 2029

<https://marketpublishers.com/r/RBB90C52DB6EN.html>

Date: February 2024

Pages: 309

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

ID: RBB90C52DB6EN

Abstracts

The global market for rodenticides is estimated at USD 5.8 billion in 2024 and is projected to reach USD 7.7 billion by 2029, at a CAGR of 5.9% during the forecast period. Variations in climate patterns have the potential to alter rodent behavior and distribution, consequently prompting fluctuations in the demand for rodenticides across various regions. Climatic elements such as extreme weather occurrences or shifts in temperature and precipitation can directly impact rodent populations and their interactions within human environments.

“Climatic variations lead to increase in rodent infestation.”

Climate directly affects the behavior, breeding patterns, and distribution of rodents. Warmer temperatures may accelerate the reproductive rates of certain rodent species, leading to population booms in regions where they thrive. Conversely, extreme weather events like floods or droughts can disrupt rodent habitats, prompting migrations or concentration in specific areas. These fluctuations in rodent populations can drive changes in the demand for rodenticides as pest control measures. Climate changes can impact the frequency and geographic spread of diseases transmitted by rodents. Elevated temperatures and shifts in precipitation can foster environments conducive to the transmission of illnesses carried by rodents, including hantavirus and leptospirosis.

“In 2023, rats stood as the prominent market share within the rodent type segment of rodenticides market. “

Rats are present across the globe, residing in urban, suburban, and rural settings. Their ability to adapt to a wide range of habitats enables them to flourish in diverse ecosystems, establishing them as a prevalent and enduring pest species. Some rat species, like the brown rat (*Rattus norvegicus*) and the black rat (*Rattus rattus*), are considered invasive species due to human-induced introductions to new regions. These invasive rats have the potential to outcompete indigenous wildlife, leading to disturbances in ecosystems and endangering biodiversity.

“Within the type segment, the anticoagulants segment holds the most substantial share.”

Anticoagulant rodenticides exhibit high effectiveness in managing rodent populations by disrupting the blood clotting mechanism in rodents. This disruption results in internal bleeding, ultimately leading to the demise of the rodents. Such a mechanism guarantees a high efficacy rate in eradicating rodent infestations. Anticoagulant rodenticides often exhibit a delayed onset of action, implying that rodents might ingest multiple doses before encountering lethal effects. This attribute enhances their efficacy, especially in scenarios where bait shyness or resistance to other rodenticides is a concern. In contrast to other varieties of rodenticides, anticoagulants present a low risk of secondary poisoning to non-target species, such as predators and scavengers.

“The rodenticides market in Europe is anticipated to maintain consistent growth throughout the forecast period.”

In Europe, the rodenticides market is expected to sustain steady growth over the forecast period. The combination of regulatory compliance requirements, public health concerns, technological advancements, and increasing pest pressure drives the growth of the rodenticide market in Europe. The French National Medicine Academy has highlighted Paris's significant rat population, estimated to be between 1.5 to 1.75 rats per person, placing it among the most infested cities globally. This alarming prevalence has prompted concerns about the potential health risks posed by rats and the diseases they can transmit to humans. Urbanization plays a key role in the surge of rodent populations in cities, as the development of previously barren areas into urban centers provides rats residing in burrows with access to these newly constructed environments.

The Break-up of Primaries:

By Value Chain: Demand side – 41%, Supply side- 59%

By Designation: CXOs – 33%, Managers – 25%, Executives – 42%

By Region: North America – 24%, Europe – 29%, APAC – 30%, RoW - 17%

Key players in this market include BASF SE (Germany), Bayer AG (Germany), Syngenta AG (Switzerland), UPL (India), Neogen Corporation (US), Anticimex (Sweden), Ecolab (US), Rentokil Initial plc (UK), Senestech, Inc. (US), Rollins, Inc. (US), Liphatech, Inc. (US), JT Eaton & Co., Inc. (US), PelGar International (UK), Bell Laboratories Inc. (US) and Abell Pest Control (Canada).

Research Coverage:

The report segments the rodenticides market based on type, mode of application, end use, rodent types, 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 rodenticides market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges. A detailed analysis of the key industry players has been done to provide insights into their business overview, solutions, services, key strategies, Contracts, partnerships, and agreements. New product launches, mergers and acquisitions, and recent developments associated with the rodenticides market. Competitive analysis of upcoming startups in the rodenticides market ecosystem is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall rodenticides market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities. The report provides insights on the following pointers:

Analysis of key drivers (Increase in concerns about vector-based disease outbreaks and public health initiatives, Impact of climate change on rodent proliferation, Displacement of rodents due to urbanization and, Increase in damage due to rodent attacks), restraints (Stringent regulations and ban on the

use of rodenticides in developed countries and Increase in the use of mechanical methods for rodent control), opportunities (Increase in government initiatives and support of public corporations for rodent control, Growth opportunities in Asia Pacific and South America and Increase in demand for rodent pest control services from the hospitality and tourism sectors)

and challenges (Increase in resistance to conventional rodenticides, Capital investments for equipment, and, High toxicity of rodenticides).

Product Development/Innovation: Detailed insights on, research & development activities, and new product launches in the rodenticides market.

Market Development: Comprehensive information about lucrative markets – the report analyses the rodenticides market across varied regions.

Market Diversification: Exhaustive information about new products, untapped geographies, recent developments, and investments in the rodenticides market

Competitive Assessment: In-depth assessment of market shares, growth strategies, and product offerings of leading players like BASF SE (Germany), Bayer AG (Germany), Syngenta AG (Switzerland), UPL (India), Neogen Corporation (US), Anticimex (Sweden), Ecolab (US), Rentokil Initial plc (UK), Senestech, Inc. (US), Rollins, Inc. (US), Liphatech, Inc. (US), JT Eaton & Co., Inc. (US), PelGar International (UK), Bell Laboratories Inc. (US) and Abell Pest Control (Canada), Fort Products Limited (UK), Impex Europa S.L. (Spain), Truly Nolen of America, Inc. (US), Futura GmbH (Germany), BioGuard Pest Solutions (US), Southern Suburbs Pest Control (Australia), Ardent, LLC. (US), Dr Pest Control (India), Native Pest Management (US), and Pecopp (India) in the rodenticides market.

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About

The report “Rodenticides Market by Type (Anticoagulants, Non-Anticoagulants, and Others), by End User (Agricultural Field, Warehouses, Pest Control Companies, Urban Centers, and Others) & by Geography - Global Trends & Forecasts to 2019” defines the rodenticides market and segments it into agriculture & farming, pest control companies, urban center segments with analyses and projections of the market size of each of these segments, in terms of value.

Top players in the global Rodenticides market are

Syngenta AG

BASF SE

Impex Europa S.L.

Pelgar International

Bayer CropScience

The rodenticides market is driven by growth in global demand for food grains and increase in farmer awareness to reduce food grain wastage due to rodents. The key market players adopt new product launches as their preferred strategy to sustain the competition in the market. The use of rodenticides as a part of integrated pest management programs has further driven the market.

In 2013, pest control companies were the largest end users for rodenticides. The Asia-Pacific market for rodenticides is projected to grow at the highest CAGR due to the emerging rodenticides markets such as China and India. The market is estimated to grow with the increase in demand for food grains.

On the basis of type

Anticoagulants

First generation anticoagulants

Second generation anticoagulants

Non-anticoagulants

Others (non-chemical, natural rodenticides)

On the basis of end user

Agricultural field

Warehouses

Pest control companies

Urban centers

Others (household consumers)

On the basis of geography

North America

Europe

Asia-Pacific

Latin America

RoW

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