

Africa Crop Protection Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Africa Crop Protection Chemicals Market size is estimated at 1.53 billion USD in 2024, and is expected to reach 1.80 billion USD by 2029, growing at a CAGR of 3.32% during the forecast period (2024-2029).

Insecticides dominate the African crop protection chemicals market

Agriculture is one of the major sectors in Africa. This sector fulfills the growing population's food security needs and helps the region to grow economically. The region's diverse climate conditions are favorable to the various crops, including wheat, maize, rice, soybeans, sunflower, beans, tobacco, coffee, cocoa, and tea.

Insecticides dominated the African crop protection chemicals market, accounting for a share of 39.9% in 2022. Crop losses in African countries due to insects are estimated at 49.0% of the expected total crop yield each year, according to the Centre for Agriculture and Biosciences International. However, some crop losses may be even worse, and the effects of the changing climate are expected to increase the damage done by insects. Stem borers, leaf-eating caterpillars, bean flies, aphids, thrips, leafhoppers, whiteflies, and beetles are major pests that cause economic yield losses in the region.

Herbicides are the second most used crop protection chemicals in Africa, accounting for a market share of 3.0% in 2022. On average, the region is losing up to 25-100% crop losses to weed infestations every year. At the same time, the region is implementing intensive agricultural practices to meet the food needs of a growing population, which

favors the infestation of various weed species. During the historical period, the consumption of herbicides witnessed significant growth, and the usage increased by 8,264 metric tons between 2017 and 2022.

Growing population, a decrease in arable land, and a rise in food security are some driving factors of the market in the region, and the market is anticipated to witness a CAGR of 3.7% during the forecast period.

The market is growing due to the rising consumption of pesticides to protect crops from pests and weeds

The demand for pesticides in Africa is increasing to protect crops from pests, diseases, and weeds. Farmers in the region depend heavily on these chemicals as pest and disease infestations can result in substantial crop damage and loss.

The fall armyworm infestation can lead to a shortage of 16 million metric tons of maize worth almost USD 5 billion. According to the Centre for Agriculture and Biosciences International, if this moth is not properly controlled, it has the potential to cause annual losses of 8.3 to 20.6 million tons in 12 of Africa's major maize-producing nations.

Africa cultivates root and tuber crops such as cassava, sweet potato, potato, and yam on 23 million hectares of land. Cassava is consumed by 500 million to 1 billion Africans, but it is susceptible to insect pests and disease. The cassava mosaic virus and cassava brown streak disease are the most significant diseases affecting the crop. The annual economic losses in eastern Africa and central Africa are estimated to be between USD 1.90-2.70 billion.

Maize, rice, wheat, and sorghum are the most important food crops grown in the country. Among these, maize is the most widely grown cereal crop. It is highly susceptible to pests, like *Chilo partellus* Swinhoe (Crambidae), which can cause significant yield losses ranging from 15% to 100% annually. In fact, farmers in eastern Africa have reported production losses of up to USD 450 million due to *Chilo partellus* alone. These factors are expected to drive the consumption of pesticides, and the crop protection chemicals market is expected to register a CAGR of 3.3% during the forecast period.

Africa Crop Protection Chemicals Market Trends

Adoption of IPM strategies and other alternative methods like crop rotations significantly reduces pesticide consumption per hectare

During the historical period, there has been a remarkable decline in pesticide consumption per hectare within Africa. In 2017, the pesticide consumption rate stood at 1,175 g per ha. However, subsequent efforts have successfully reduced it by 96 g per ha, resulting in a current rate of 1,079 g per ha. This significant reduction in pesticide usage was due to a combination of various factors, which include the implementation of improved agricultural practices that prioritize sustainable and eco-friendly methods. Farmers have increasingly adopted innovative techniques such as integrated pest management, crop rotation, and biological pest control, which have minimized the need for chemical pesticide usage per hectare.

Herbicides are majorly utilized pesticide products in the region, but in recent years, the herbicide consumption per hectare is significantly reduced by 34 g in 2022, as compared to 2017. This substantial decrease in herbicide consumption was due to the successful implementation of integrated weed management (IWM) practices. Under this approach, farmers have adopted a range of innovative strategies such as diversified cropping systems, mechanical weed control, crop rotation, and the use of cover crops. These environment-friendly techniques have contributed to reducing herbicide reliance and also promoted sustainable agriculture, enhancing soil health and conserving biodiversity.

Farmers adopt IPM strategies, disease-resistant crops, and alternatives to control pests and diseases, raising awareness of pesticide's negative effects, thus reducing fungicide and insecticide use per hectare by 38 and 23 g per ha in 2022, compared to 2017.

Increasing demand and limited availability majorly fluctuate the active ingredient prices

Cypermethrin is the predominant insecticide utilized in the region to control pests affecting crops such as rice, cotton, soybeans, and vegetables. Due to its high demand, the price of Cypermethrin rose by USD 3,186.2 per metric ton in 2022 compared to 2017. This increase was due to its limited production within the region, leading to a significant dependence on imports to meet the demand.

Atrazine stands as the primary herbicide utilized in maize-producing countries like South

Africa and Nigeria, with 88% of the maize area employed for weed control. Its usage extends to various terrestrial food crops, non-food crops, forests, residential turf, golf courses, recreational areas, and rangelands, making it a widely adopted weed control measure on farms. Due to its expanding application across various crops, the price of Atrazine has been steadily increasing Y-o-Y, with a growth recorded at USD 3,292.7 per metric ton in 2022 compared to 2017.

Glyphosate is widely embraced as the second most used herbicide in the region, primarily due to its affordability. Many farmers opt for glyphosate as their primary weed control solution. In 2022, glyphosate's active ingredient was priced at USD 1,143.2 per metric ton.

During the historical period, prices of pesticide-active ingredients in the region experienced a substantial increase, amounting to an increase of USD 1,580.9 per metric ton. This surge may be mainly attributed to the region's limited production capacity. Over the past five years, there has been a notable rise in pesticide imports into Africa, leading to heightened dependence on imported products and consequent price escalation in the region.

Africa Crop Protection Chemicals Industry Overview

The Africa Crop Protection Chemicals Market is moderately consolidated, with the top five companies occupying 59.93%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, FMC Corporation and Syngenta Group (sorted alphabetically).

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Contents

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Consumption Of Pesticide Per Hectare

4.2 Pricing Analysis For Active Ingredients

4.3 Regulatory Framework

4.3.1 South Africa

4.4 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (INCLUDES MARKET SIZE IN VALUE IN USD AND VOLUME, FORECASTS UP TO 2029 AND ANALYSIS OF GROWTH PROSPECTS)

5.1 Function

5.1.1 Fungicide

5.1.2 Herbicide

5.1.3 Insecticide

5.1.4 Molluscicide

5.1.5 Nematicide

5.2 Application Mode

5.2.1 Chemigation

5.2.2 Foliar

5.2.3 Fumigation

5.2.4 Seed Treatment

5.2.5 Soil Treatment

5.3 Crop Type

5.3.1 Commercial Crops

5.3.2 Fruits & Vegetables

5.3.3 Grains & Cereals

- 5.3.4 Pulses & Oilseeds
- 5.3.5 Turf & Ornamental
- 5.4 Country
 - 5.4.1 South Africa
 - 5.4.2 Rest of Africa

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)
 - 6.4.1 ADAMA Agricultural Solutions Ltd.
 - 6.4.2 BASF SE
 - 6.4.3 Bayer AG
 - 6.4.4 Corteva Agriscience
 - 6.4.5 FMC Corporation
 - 6.4.6 Nufarm Ltd
 - 6.4.7 Sumitomo Chemical Co. Ltd
 - 6.4.8 Syngenta Group
 - 6.4.9 UPL Limited
 - 6.4.10 Wynca Group (Wynca Chemicals)

7 KEY STRATEGIC QUESTIONS FOR CROP PROTECTION CHEMICALS CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (DROs)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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