

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

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Abstracts

The Africa Insecticide Market size is estimated at 608.49 million USD in 2024, and is expected to reach 717.10 million USD by 2029, growing at a CAGR of 3.34% during the forecast period (2024-2029).

The foliar method of application dominates the market due to its quick action

Insecticides are applied through multiple methods in Africa, including chemigation, foliar application, seed treatment, soil treatment, and fumigation. These methods of pesticide application are contributing to the overall expansion of the market.

The foliar method of application dominated the market in 2022, accounting for a share of 57.9%. The foliar application of insecticides is often a component of IPM strategies, allowing for targeted and precise application to manage pests while minimizing environmental impact. Insecticides like clothianidin, dinotefuran, imidacloprid, and thiamethoxam are the most commonly used systemic insecticides applied through the foliar method.

Following the foliar application, seed treatment accounted for 16.8% of the African insecticide market in 2022. Soil-borne insects like the banana weevil *Cosmopolites sordidus* Germar, the sweet potato weevil *Cylas formicarius* Fabricius, the bean maggots *Ophiomyia spencerella* Greathead, *O. phaseoli* Tryon, and *O. centrosematis* de Meij are frequently reported as common agricultural pests impacting economic crops in countries across East Africa (Rwanda, Kenya, Tanzania, Uganda, and Burundi). These can be effectively controlled by seed treatment.

Climate change is encouraging the proliferation of new insect pests affecting crops that pose a serious food and financial threat to African farmers. Climate change-induced droughts and high temperatures have provided optimal conditions for pests and diseases to thrive, unleashing destruction on crops. As temperatures rise, the reproduction success of plant pests increases as they are sensitive to temperature changes. Owing to this, the market is anticipated to register a CAGR of 3.2% during the forecast period.

Climate, especially temperature, has a strong and direct influence on the development and growth of insect pest populations

Countries in Africa are highly dependent on agriculture, an activity traditionally vulnerable to unpredictable changes in climatic conditions. Any increase in temperature caused by climate change, coupled with a decline in rainfall, will have direct and indirect drastic effects on crop production and food security. On average, 30–50% of the yield losses in crops are caused by pests. Temperature has a strong and direct influence on the development and growth of insect pest populations. An increase in pest infestation is driving the insecticide market in the region.

South Africa accounted for 14.8% of the African insecticides market in 2022. Maize, rice, wheat, and sorghum are the most important food crops grown in the country. In South Africa, the major pest outbreaks were aphids, whiteflies, red spider mites, and thrips. Moreover, some of these pests are vectors of destructive viral pathogens. There has been significant growth observed in the South African insecticide market value during the historical period (between 2017 and 2022), and the market value increased by USD 21.0 million.

Agricultural pesticides like insecticides have made it possible to increase production in crop yields in Africa. Africa's population, currently estimated at 1.3 billion people, is expected to double by 2050, placing enormous pressure on African food production systems that are plagued by low productivity. Therefore, the increasing concerns over food production, coupled with the emergence of new pests due to erratic climatic conditions, is expected to boost the usage of insecticides in the region, and the market is anticipated to register a CAGR of 4.1% during the forecast period.

Africa Insecticide Market Trends

Growing insect pest infestations and the need for higher food production are raising the consumption of insecticides per hectare in the region

The consumption of insecticides per hectare in Africa can vary significantly across different regions and crops. Insecticide usage is influenced by several factors, such as the prevalence of insect pests, crop types, farming practices, and the level of agricultural development in each country.

In Africa, the use of insecticides is critical for managing insects in a variety of agricultural systems, including basic food crops like maize, rice, and wheat, as well as cash crops like cotton, coffee, and cocoa. Insecticides are used to manage a wide variety of insect pests that can cause considerable crop damage, lower yields, and have an impact on food security. Between 2017 and 2022, insecticide consumption per hectare in Africa witnessed a growth of 5.3%.

Insect pests pose a significant threat to agricultural productivity in Africa. The continent is home to a diverse range of insect pests that can cause extensive damage to crops. The increasing insect pressure, driven by factors such as climate change, changing insect dynamics, and globalization of trade, has necessitated the use of insecticides to manage insect populations effectively. For instance, a total of 1.6 million hectares in Ethiopia and Kenya were treated with broad-spectrum organophosphate and pyrethroid insecticides as a result of the locust outbreak in the Horn of Africa's desert between 2019 and 2021.

The increasing demand for food in Africa has led to a concerted effort to enhance agricultural output. Insecticides serve an important role in increasing agricultural yields by protecting plants from insects that might disrupt output. The necessity to fulfill the population's food requirements drives the reliance on insecticides.

Increasing pest infestations resulted in high demand for active ingredients like cypermethrin and imidacloprid, and their limited production capacities are raising the prices

Climate change is significantly impacting agricultural production in Africa, providing favorable conditions for the proliferation of various insect pests like whiteflies. If left unmanaged, these pests can lead to an average crop loss of 25-40%. To combat this

issue, farmers heavily rely on insecticides to gain better control over these harmful insects. As a result, the use of insecticides has become a crucial component of agricultural practices in the region.

Cypermethrin stands out as one of the pricier active ingredients compared to others. In 2022, it recorded a price of USD 21,023.0 per metric ton. Over the historical period, the price of cypermethrin has seen a substantial increase, surging by USD 3,186.2 per metric ton in 2022 compared to its price in 2017. This escalating price trend can be primarily attributed to its extensive usage across various crops to control a wide range of insect pests, such as American bollworms, weevils, codling moths, leafrollers, fruit flies, caterpillars, cutworms, stalk borers, and more. The limited production of cypermethrin within the region also contributes to the upward price trajectory.

Imidacloprid, classified as a systemic insecticide within the neonicotinoid family, effectively controls an extensive array of insect pests. These pests encompass sucking insects, soil insects, and even termites, making it a versatile solution applicable to various crops. The price of imidacloprid stood at USD 17,120.8 per metric ton in 2022.

The fluctuations in the prices of active ingredients are primarily influenced by the rising costs of raw materials, which constitutes one of the significant contributing factors to the growth of the market.

Africa Insecticide Industry Overview

The Africa Insecticide Market is moderately consolidated, with the top five companies occupying 62.13%. The major players in this market are BASF SE, Bayer AG, FMC Corporation, Nufarm Ltd and Syngenta Group (sorted alphabetically).

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