

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

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Abstracts

The Africa Nematicide Market size is estimated at 4.88 million USD in 2024, and is expected to reach 5.62 million USD by 2029, growing at a CAGR of 2.85% during the forecast period (2024-2029).

Soil application of nematicides dominated the market owing to fewer risks of exposing non-target organisms

In Africa, nematodes in agriculture are effectively controlled through the use of various modes of applying nematicides. By selecting the appropriate application method, farmers can save costs, as they can efficiently apply the nematicides, cover specific areas, and reduce wastage. This improved efficiency leads to optimal usage and lowers input costs for farmers.

Other application methods, such as soil application and foliar application of nematodes, generally pose fewer risks of exposing non-target organisms. The dominant mode of nematicide application in agricultural practices is soil application, accounting for 68.1% of the overall application segment in 2022. Grains and cereals hold the largest market share at 46.0%. This is because the nematicide remains primarily in the soil where the target nematodes reside and their effectiveness in protecting the quality of grains and cereals by preventing or reducing nematodes.

In 2022, foliar applications accounted for 14.2% of the African nematicide market. Its primary purpose is to manage nematode infestations in inflorescences and leaves. Chrysanthemum nematodes, a type of foliar nematode, are typically found in buds and

leaves but may also be present in soil. These nematodes can also harm ornamental plants and crops like roses and tomatoes, causing stunted growth, wilting, and reduced yields.

In Africa, there is a growing concern among farmers due to the rising crop losses caused by nematode infestations each year. The use of nematicides is increasing to enhance crop productivity and profitability. The mode of nematicide application is expected to witness significant growth, with a projected CAGR of 2.8% during the forecast period.

The focus of African farmers on nematode management to achieve optimal crop health and maximize yield is expected to drive the market

Africa has a diverse agricultural sector. Nematodes can have a significant impact on various crops, including grains, fruits, vegetables, and others, leading to crop losses. As a result, there is a growing need for nematicides to control nematode populations and reduce crop damage. As of 2022, the region accounted for a value of USD 4.6 million in the overall global nematicide market.

In 2022, the Rest of Africa was the main purchaser of nematicide products. The Rest of Africa accounted for 70.3% of the total nematicide market's value in Africa. As farmers in the region implement more efficient nematode control methods, the demand for nematicides is expected to increase, leading to an increase in the market share of the Rest of Africa. It is expected to record a CAGR of 2.4% from 2023 to 2029.

During the forecast period (2023-2029), the nematicide market in South Africa is projected to have the highest growth rate compared to other countries, with a CAGR of 3.7%. In South Africa, plant nematodes cause an estimated annual yield loss of approximately 14% in cereal, vegetable, and fruit crops. Due to this, there is an increased demand for nematicides to effectively control nematodes, leading to the expected rapid expansion of the market.

With the expansion of crop cultivation, increased awareness of nematode-related crop damage, and the growing focus on advanced agriculture practices, the demand for nematicides as an effective solution for nematode control is expected to rise. Therefore, the African nematicide market is expected to record a CAGR of 2.8% during the forecast period (2023-2029).

Africa Nematicide Market Trends

The demand for nematicides is driven by their effectiveness in controlling nematodes

The average nematicide consumption per hectare of agricultural land in Africa was recorded at 233.9 grams in the year 2022. The root-knot and lesion nematodes are widely distributed in South Africa. The root-knot nematode causes the most damage, and yield loss in potatoes was estimated to be 16.7%, accounting for USD 7.0 million annually, followed by the lesion nematode. The golden cyst nematode is a quarantine pest found in isolated areas in South Africa.

Meloidogyne spp is known to cause severe losses in various crops across African countries. For instance, crop losses of 30% or more in tobacco farms in some parts of Tanzania and 50% yield loss in banana plantations in Uganda have been reported due to Meloidogyne spp. These instances are increasing the need for nematicides in the region. Moreover, the lack of alternative strategies that are effective may greatly contribute to increased usage of nematicides, which otherwise may lead to food crises across the continent.

In the hot and dry summer seasons, nematodes can enter a state of dormancy in the soil, enabling them to survive unfavorable conditions. When mild and wet winters arrive, the nematodes become active again, resulting in rapid multiplication, which poses a significant threat to crops. Consequently, higher application rates of nematicides are observed during the winter season in Africa. Additionally, farmers' increasing awareness of nematode damage symptoms, often mistaken for nutrient deficiencies, is driving the market for nematicides.

The factors like significant yield losses when nematodes are left uncontrolled and lack of other effective alternative solutions to chemical nematicides are forcing farmers to use higher amounts of nematicides per hectare in African countries.

Increasing nematode infestation caused by root-knot nematodes is raising the demand for nematicides and their prices in the region

Plant parasitic nematodes have emerged as a substantial threat to the region's agriculture sector. The prevalence of intensive agriculture practices, such as no-tillage

and monoculture, coupled with the impact of climate change, particularly the rise in warm conditions, has created a favorable environment for nematode growth, resulting in significant losses for the sector.

Fluensulfone holds a prominent position as a widely used nematicide in the region, and its active ingredient was priced at USD 19,038.9 per metric ton in 2022. This marked a significant increase of 17.9% compared to its price in 2017. The active ingredient is specifically formulated to combat root-knot nematodes in various crops, including cucurbits, fruiting vegetables, leafy vegetables, certain berry crops, brassica vegetables, various root and tuber crops, sugar cane, coffee, black pepper, and soybean. The increasing demand for the active ingredient is driven by its effectiveness in controlling root-knot species.

Abamectin serves as a systemic nematicide utilized for seed treatment, providing an efficient solution to minimize early-growth root infections caused by nematodes, including the control of root-knot nematode species. The cost of Abamectin's active ingredient has been on the rise, reaching USD 12,276.6 per metric ton in 2022, driven by growing demand and limited availability within the region. South Africa and Kenya are the primary importers of Abamectin, sourcing it from China, India, Denmark, and the United States.

Oxamyl is a non-fumigant nematicide and insecticide available in various forms, capable of controlling root-knot nematodes in groundnuts, potatoes, sugarcane, and pineapples. The price of the active ingredient was USD 8,803.3 per metric ton in 2022, which is increasing Y-O-Y.

Africa Nematicide Industry Overview

The Africa Nematicide Market is fairly consolidated, with the top five companies occupying 73.66%. The major players in this market are ADAMA Agricultural Solutions Ltd, Bayer AG, FMC Corporation, Syngenta Group and UPL Limited (sorted alphabetically).

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