

China Fungicide - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The China Fungicide Market size is estimated at 1.29 billion USD in 2024, and is expected to reach 1.59 billion USD by 2029, growing at a CAGR of 4.16% during the forecast period (2024-2029).

Foliar application dominated the Chinese fungicide market owing to its quick action

China has a well-established fungicide manufacturing industry, with several domestic companies producing fungicide formulations and active ingredients. Major fungicide classes used in China include triazoles, strobilurins, benzimidazoles, dithiocarbamates, and quinone outside inhibitors (QoIs). These fungicides have different modes of action and target specific fungal pathogens. China accounted for 38.7% of the Asia-Pacific fungicide market in 2022.

Foliar application dominated the Chinese fungicide market and accounted for a share of 60.2% in 2022. Fungicides applied in foliar can provide rapid action against fungal pathogens. They are typically formulated to have quick absorption and translocation properties within the plant. This allows the fungicide to reach the affected tissues and inhibit or kill the fungi, reducing disease progression and preventing further damage.

Seed treatment accounted for 14.0% of the Chinese fungicide market in 2022. Fungal infections can weaken and stunt the development of plants. Fungicide seed treatments can help plants maintain their health and vigor by preventing or lowering disease damage. This allows the plants to allocate more energy toward growth and development, leading to healthier and more productive crops. The market value of seed

treatment between 2017 and 2022 increased by USD 12.6 million.

Exports of fungicides from China are also projected to increase by 2026. In 2021, the country exported 110.2 million kg of fungicides. By 2026, exports are projected to reach 125.6 million kg. This factor may further drive the fungicide market, which is anticipated to register a CAGR of 3.7% during the forecast period.

China Fungicide Market Trends

Setting regulations for controlling maximum residue levels and adopting other alternatives for disease control significantly reduced per-hectare fungicide consumption

During the historical period, China witnessed a notable decrease of approximately 16% in the consumption of fungicides per hectare, attributed to several reasons. The Chinese government has implemented regulations and policies to control the use of fungicides. These include setting limits on the maximum residue levels of fungicides in agricultural products and establishing guidelines for their safe and responsible use. By enforcing these regulations, China aims to ensure that fungicides are used judiciously and with proper precautions.

China has actively encouraged the implementation of integrated pest management (IPM) strategies, which encompass preventive measures, biological control techniques, and judicious application of pesticides, such as fungicides. This comprehensive approach has successfully led to a decrease in the rate of fungicide usage.

The Chinese government has also explored alternative methods of disease control, including the development of disease-resistant crop varieties through traditional breeding or genetic modification techniques. By focusing on enhancing the natural resistance of crops to diseases, China has reduced the reliance on fungicides.

China has been utilizing biological control agents as an alternative to fungicides. These agents include beneficial microorganisms, such as bacteria and fungi, which can suppress or inhibit the growth of plant pathogens. Applying these biocontrol agents to crops could lead to a reduction in the rate of fungicide usage.

The farmers adopted techniques, such as crop rotation and soil management, to prevent and manage diseases effectively. These techniques reduced the consumption

of fungicide per hectare in China.

Mancozeb, propineb, and ziram are the most commonly used fungicide ingredients in China

Mancozeb, propineb, and ziram are the most commonly used fungicide ingredients in China. In 2021, the country exported 110,250,000 kg of fungicides and was fourth behind Germany, France, and China. On average, exports have grown by 2.2% Y-o-Y since 1997. Exports are projected to reach 125,640,000 kg by 2026.

Mancozeb is a broad-spectrum contact fungicide that is used to control a number of fungal diseases, such as anthracnose, pythium blight, leaf spot, downy mildew, botrytis, rust, and scab, in oilseed rape, lettuce, wheat, apples, tomatoes, table grapes, wine grapes, bulb onions, carrots, parsnip, shallots, and durum wheat. It was priced at USD 7.7 thousand per metric ton in 2022.

Propineb is a dithiocarbamate contact fungicide, priced at USD 3.5 thousand per metric ton in 2022. Propineb is applicable to tomato, Chinese cabbage, cucumber, mango, flowers, and other crops. It is used in preventing and treating early late blight of mango, anthracnose of Chinese cabbage, potato downy mildews, cucumber downy mildew, and tomato late blight.

Ziram is a carbamate, agricultural fungicide. It can be applied to the foliage of plants, but it is also used for soil and/or seed treatment. It can be used in pome fruit, stone fruit, nuts, vines, vegetables, and ornamentals, particularly to control scabs in apples and pears, as well as *Alternaria*, *Septoria*, peach leaf curl, shot-hole, rusts, black rot, and anthracnose in other fruit crops. Ziram was priced at USD 3.3 thousand per metric ton in 2022.

The active ingredient prices are majorly influenced by factors like weather conditions, disease outbreaks, energy prices, and labor costs in the country.

China Fungicide Industry Overview

The China Fungicide Market is moderately consolidated, with the top five companies

occupying 61.60%. The major players in this market are BASF SE, Bayer AG, Nutrichem Co. Ltd, Syngenta Group and UPL Limited (sorted alphabetically).

Additional Benefits:

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