

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

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Abstracts

The China Herbicide Market size is estimated at 2.00 billion USD in 2024, and is expected to reach 2.70 billion USD by 2029, growing at a CAGR of 6.19% during the forecast period (2024-2029).

The market is driven by the need for effective control of herbicides

Farmers in China employ various methods of herbicide application. The market for all these methods was valued at USD 1.78 billion in 2022.

In 2022, the soil treatment method had the highest market share of USD 841.5 million, accounting for 47.2% of the total herbicide market. The popularity of soil treatment is due to its efficacy in utilizing pre-emergent herbicides, specifically targeting weed seeds, inhibiting their germination before crop sowing. With a market share of 31.9% in 2022, foliar application of herbicides offers numerous benefits in weed control. It provides precise targeting as the herbicides directly contact the weed's foliage, facilitating absorption through the leaf surfaces.

The chemigation method grew from USD 199.4 million in 2017 to USD 339.8 million in 2022. In 2022, it was predominantly used in the grains and cereals segment, representing 52.3% of the market share. This is due to the prevalence of micro-irrigation systems in these crops, making them well-suited for chemigation.

The foliar application offers several advantages in weed control. It provides targeted action, as the herbicides come into direct contact with the weed's foliage.

The fumigation method of weed control is less common than other application methods due to its limited applicability attributed to its high specificity of usage and environmental concerns. However, it effectively controls a few tough weeds that other methods cannot.

Considering the effectiveness, specificity, and essentiality of each application method for farmers, the market for herbicides is projected to register a CAGR of 6.1% during the forecast period from 2023 to 2029.

China Herbicide Market Trends

Adoption of alternative methods like crop rotation and technical advancements in herbicide application-controlled herbicide application contributes to lower consumption per hectare

The usage of herbicides in China has reduced significantly due to several key factors. Some factors contributing to this are the growing recognition and adoption of crop rotation and biological controls as essential tools for effective weed management in various sectors, such as agriculture, horticulture, and landscaping.

Crop rotation is a practice where different crops are grown in a specific sequence on the same land over time. This helps break the lifecycle of weeds, as different crops have different growth patterns and nutritional needs. By alternating crops, Chinese farmers have disrupted weed growth cycles, reduced weed populations, and minimized the need for higher use of herbicides.

Chinese farmers skillfully employ biocontrol agents to effectively manage weeds in a wide array of crops, thereby leading to a notable decrease in the usage of herbicides. The implementation of these biocontrol agents is highly beneficial, resulting in reduced reliance on herbicide applications throughout various agricultural practices.

Chinese farmers use unmanned aerial systems (UAS) imagery analysis and computer vision techniques to enhance weed management practices. By employing this approach, they identify weed-infested rows and selectively apply herbicides accurately, leaving non-weed-infested rows untouched. This innovative method effectively minimizes the wastage of herbicides by avoiding unnecessary applications and reducing overall herbicide consumption per hectare.

Farmers adopt genetically modified organism (GMO) crops to minimize additional investment requirements, resulting in a significant reduction in herbicide consumption per hectare.

China is the world's largest producer and exporter of glyphosate

Weeds are a major constraint to crop production, which is crucial for food security in China. Over 500 invasive weeds are an increasing threat to agricultural production and ecosystems in China. Atrazine, paraquat, and glyphosate are commonly used herbicides in China.

Atrazine is an herbicide widely used to control various broadleaved weeds and grasses. China consumes more than 16,000 ton (97% technical) of atrazine annually. Atrazine is mainly used to control annual weeds in corn or sugarcane fields. China is one of the major suppliers of atrazine worldwide. It was priced at USD 13.7 thousand per metric ton in 2022.

Paraquat is the active ingredient of gramoxone, which controls weeds and grasses. It is also used for desiccating crops, like cotton, before harvest. Paraquat was valued at USD 4.6 thousand per metric ton in 2022. China is a major paraquat export country, and over 80% of its paraquat output is exported to countries worldwide.

Glyphosate is an organophosphorus broad-spectrum systemic herbicide and crop desiccant. It was priced at USD 1.1 thousand per metric ton in 2022. Glyphosate is mainly used to control weeds like grasses, sedges, and broadleaves. China is the world's largest producer and exporter of glyphosate in the world. The output of glyphosate in China increased from 316,000 ton in 2010 to about 505,000 ton in 2017. In 2017, China exported over 300,000 ton of glyphosate technical, which satisfied more than half of the global glyphosate demand.

Factors like weather conditions, weed infestation, energy prices, and labor costs in the country majorly influence the prices of active ingredients.

China Herbicide Industry Overview

The China Herbicide Market is moderately consolidated, with the top five companies occupying 60.61%. The major players in this market are Bayer AG, Corteva Agriscience, FMC Corporation, Nutrichem Co. Ltd and UPL Limited (sorted alphabetically).

Additional Benefits:

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