

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

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Abstracts

The Europe Crop Protection Chemicals Market size is estimated at 15.20 billion USD in 2024, and is expected to reach 18.59 billion USD by 2029, growing at a CAGR of 4.11% during the forecast period (2024-2029).

Herbicides and fungicides dominate the market owing to their increased use in pest control

Agriculture in Europe is diverse and plays a significant role in the economies of many countries. The region encompasses a wide range of climates and is known for cultivating wheat, barley, soybean, and various fruits and vegetables. In 2022, Europe occupied a share of 15.3% by value.

The population growth in the region has encouraged the use of pesticides in agriculture to achieve better yields and meet the increasing demand for food crops. At the same time, technological advancements have changed the way of farming and eased the pest control process.

Herbicides occupied the largest share of 40.1% by value in 2022. Weed attacks in staple, commercial, and horticultural crops pose a significant challenge to the region's agricultural productivity. As there is a significant contribution by the fruit sector to the region's economic growth, weeds cause substantial economic damage by attacking fruits. *Amaranthus retroflexus* (redroot pigweed), *Echinochloa crus-galli* (Barnyard grass), *Conyza canadensis* (Canadian fleabane), *Digitaria sanguinalis* (large

crabgrass), *Cyperus rotundus* (purple nutsedge) are the most common weeds in the region. Therefore, herbicide use has increased to combat these weed attacks and maintain agricultural productivity.

Additionally, fungicides occupied the second-highest share of 31.36%. Being one of the top regions for grains and pulses production, it is highly susceptible to fungal diseases, which are mitigated using fungicides.

Increased concerns for food security and various developments have facilitated the efficient and sustainable production of food by farmers while minimizing the impact of pests on their crops. This has driven the market, which is anticipated to register a CAGR of 4.1% over the forecast period.

Germany dominated the market due to increasing weed infestation in major crops

European farmers cultivate various crops, including grains (wheat, barley, oats, etc.), oilseeds (rapeseed, sunflower, etc.), fruits, vegetables, and various industrial crops. The Mediterranean region is known for olive and citrus production, while northern European countries focus on cereals and root crops.

Among the countries, Germany dominated the market and accounted for a share of 21.7% in 2022. According to the FAO, the total agricultural usage for insecticides accounted for 20,966 metric ton, followed by herbicides with 14,618 metric ton, and fungicides with 9,483 metric ton in 2020. According to Eurostat, Germany occupied 47,973,969 kg of pesticides produced during 2020, higher than 45,181,227 kg from the previous year. Increasing weed infestation in major crops and the need for crop protection to protect the yields are estimated to drive the market at a CAGR of 4.3% during the forecast period (2023-2029).

Grains and cereal crops dominated the consumption of crop protection chemicals in the region, which accounted for 60.5% in 2022. The dominance of grains and cereals is attributed to the higher cultivation area and increased pest infestations. In 2022, these crops accounted for 63.0% of the agricultural land.

The European crop protection chemicals market is driven by the need to increase crop yield and efficiency. The region's population is drastically growing, but the farmlands are diminishing. As a result, farmers are being pushed to increase their yield. Therefore,

new farming practices are being adopted by farmers to increase crop yield, which is paving the way for the crop protection chemicals market. The market is anticipated to record a CAGR of 3.5% during the forecast period.

Europe Crop Protection Chemicals Market Trends

To increase the yield of crops and reduce pest infestation, the demand for pesticides is rising

Europe has a diverse climate due to its geographical position and varying topography. Different parts of Europe have different climatic conditions, which influence the types of crops that can be grown and the pests that can thrive in those areas. In 2022, the average consumption of crop protection chemicals in this region was 38.8 kg per hectare of agricultural land.

Fungicides were the most widely used type of chemical pesticide in Europe, with an average consumption of 19.4 kg per hectare of agricultural land in the region in 2022. The prevalence of fungal diseases presents a significant risk to all crop types, as they can lead to substantial yield reductions and compromise the overall quality of harvested produce. Consequently, European farmers heavily rely on fungicides to effectively control and manage these diseases.

In 2022, the herbicide application rate was 11.7 kg per hectare, representing increased herbicide usage per hectare. This rise can be attributed to several factors, including the recognition of herbicide usage as a valuable and economically efficient approach to improve both the quantity and quality of crop yields. The herbicide application rate experienced a growth of 4.02% in 2022 compared to the previous year.

In 2022, insecticides were the third most commonly used pesticide, with an application rate of 6.9 kg per hectare. Throughout Europe, crops face significant challenges due to pests such as aphids, Colorado beetles, wireworms, and other insects, which cause substantial crop damage and loss. To address these challenges and achieve the best possible yields, insecticides play a vital role in effectively controlling and managing pests.

Demand for cypermethrin increased the active ingredient price. This surge in price is attributed to the growing demand for cypermethrin use in major crops

Cypermethrin is a primary insecticide employed in Europe. Its widespread adoption in agriculture is attributed to its effectiveness in handling a variety of insect species, including aphids, beetles, spotted ball worms, pink ball worms, early spot borers, and hairy caterpillars. Countries like Germany, the United Kingdom, and France predominantly utilize cypermethrin to manage pests across different crops. As of 2022, the cost of this active ingredient stood at USD 21.2 per metric ton.

Emamectin benzoate is an insecticide that has potent efficacy against harmful Lepidoptera species that impact the fruits and leaves of agricultural crops. The swift action and mode of operation of emamectin benzoate result in high effectiveness even at low application rates throughout all larval growth stages. It was originally designed for use in crops like stone fruits, grapes, and a wide variety of vegetables. In 2022, its price was USD 17.4 thousand per metric ton.

Azoxystrobin, a fungicide extensively employed in agriculture, possesses the widest range of activity among antifungal agents. It functions as a potent active component and finds widespread application across different crops. It effectively addresses diseases like leaf spots, rusts, powdery mildew, downy mildew, net blotch, and blight. The market valuation of azoxystrobin in 2022 was recorded at USD 4.4 thousand per metric ton.

Tebuconazole is an active ingredient known for its systemic nature, providing both curative and preventive control over plant diseases. Tebuconazole hinders spore formation, inhibiting the growth of harmful fungi, which affect crops like grapes, cherries, almonds, cereals, and canola. In 2020, its value was USD 8.7 thousand per metric ton.

Europe Crop Protection Chemicals Industry Overview

The Europe Crop Protection Chemicals Market is fairly consolidated, with the top five companies occupying 71.05%. The major players in this market are ADAMA Agricultural Solutions Ltd., BASF SE, Bayer AG, Nufarm Ltd and Syngenta Group (sorted alphabetically).

Additional Benefits:

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