

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

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Abstracts

The Europe Molluscicide Market size is estimated at 124.19 million USD in 2024, and is expected to reach 161.94 million USD by 2029, growing at a CAGR of 5.45% during the forecast period (2024-2029).

The foliar application dominates the market

Europe has diverse climatic conditions and soil types, which allow for the cultivation of a wide range of crops. The main crop is wheat, followed by barley and rye. However, there is a significant risk to crop production due to the infestations of mollusks, such as snails and slugs, that result in reduced yields, financial losses for farmers, and concerns about food security.

Various application methods are adopted in the region to manage pest and disease attacks. Foliar application occupied the highest share of 52.5% by value in 2022. It has been observed that foliar spraying of metaldehyde and thiodicarb is suitable as one of the components of integrated pest management of snails and has been quite effective in the region.

Additionally, the soil treatment method occupied the second-highest share of 32.2% by value in 2022. It has been observed that molluscicide application on soil appeared to be the easiest, safest, and most efficient way of controlling pests. If soil is treated with a systemic molluscicide, it kills mollusks that live in the soil.

Nevertheless, there are several drawbacks to the health of consumers, workers, and the

environment from using foliar pesticides. Chemigation of pesticides can be fairly utilized, making it cost-effective and removing several drawbacks common to foliar molluscicide applications. Chemigation occupied a share of 12.9% by value in 2022.

Owing to the increase in research and innovation, which are aimed to bring out the safest and most effective method of application, along with the increased awareness among the farmers regarding the effectiveness of the proper application of molluscicides, the market is anticipated to register a CAGR of 4.3% during the forecast period (2023-2029).

Increasing snail population and the growing damage to crops are boosting the usage of molluscicides

Slugs are a class of mollusks that are among the most harmful to soil due to their ability to inflict extensive damage on field crops, particularly during wet conditions of the spring and fall months. The grey slug is one of the major species of slugs, which is responsible for the majority of crop damage in Europe. France accounted for a major share of 15.5% in 2022 in terms of the consumption of molluscicides in the region.

Russia accounted for 13.66% of the total European molluscicides market in 2022. The cool, humid climates of Russia make the situation even worse as the number of snails may be as high as 200 slugs on every square yard of cultivated farm, with each one capable of producing 400 round white eggs annually. The higher reproduction rate makes it very difficult to control the snails.

In Italy, snails feed on ripe and ripening fruit, young tree leaves, and even the bark of young trees, leading to significant economic losses in citrus orchards. Additionally, their presence can disrupt irrigation management by clogging sprinkler heads and irrigation systems, further exacerbating the challenges faced by farmers.

Metaldehyde, niclosamide, and metal salts such as iron (III) phosphate, aluminum sulfate, and ferric sodium EDTA comprise commonly used molluscicides in the region and can be applied through different methods.

Advancements are being made in developing more effective molluscicide formulations to enhance bait attractiveness, palatability, and stability to improve the targeting and efficacy of molluscicides against snails and slugs. These factors are anticipated to drive

the market for molluscicides in European countries, with higher adoption by farmers.

Europe Molluscicide Market Trends

The increasing mollusk population is leading to higher application per hectare

In 2022, Italy emerged as the foremost consumer of molluscicides on a per-hectare basis, utilizing 40.8 grams. Pests like snails and slugs inflict harm on plant seeds, young plants, underground tubers, foliage, and fruits. The harm caused to young plants often leads to their demise, resulting in substantial reductions in production. Notably vulnerable are crops such as barley, canola, and pulses. The significance of the white Italian snail as a pest, like other species, is that they contaminate grain during harvest while also clogging and damaging harvest machinery.

In Europe, the Netherlands ranks second in per-hectare molluscicide consumption, recording 25.7 grams per hectare in 2022. A wide range of vegetables are particularly susceptible to slug infestations. Notably, Brussels sprout buds and green and white cabbage often fall affected by slug nibbling, rendering them unsuitable for market sale. Slugs and snails lay insane amounts of eggs, up to 400, creating a situation that demands the use of molluscicides.

Germany, France, and Spain were other prominent countries using molluscicides at the rate of 16.3 grams, 14.3 grams, and 10.3 grams per hectare, respectively, in 2022. *Helix pomatia*, also known as the Roman snail or Burgundy snail, is a species that can cause damage to agriculture in Germany. This large land snail is known to feed on various crops, including vegetables, fruits, and ornamental plants. Its feeding habits can lead to economic losses for farmers as the snails can damage the appearance and quality of the harvested produce. This makes *Helix pomatia* a concern for agricultural practices in Germany and other regions where it is found.

Metaldehyde and ferric phosphate-based molluscicides are most commonly used to control slugs and snails

Molluscicides are used to kill various mollusk species, including intermediate host snails involved in the lifecycle of schistosomes. Several molluscicides have been developed to control slugs and snails in crop environments, typically deployed as pellets placed around the plant base.

In 2022, metaldehyde was valued at USD 52.5 thousand per metric ton. Widely used in field crops, gardens, and greenhouses, it is applied in various forms such as liquid, granules, sprays, dust, or pelleted/grain bait to effectively combat slugs, snails, and other garden pests. Commercial baits usually contain 4% or less metaldehyde as the active ingredient, while some granule baits may contain up to 5-10% metaldehyde. In Europe, bait with up to 50% metaldehyde is available.

Ferric phosphate, priced at USD 52.0 thousand per metric ton in 2022, stands as a highly effective and environmentally friendly molluscicide. It poses no harm to humans, animals, non-target insects, plants, or soil microbes and exhibits stability and non-reactivity in the agroecosystem. Ferric phosphate remains the only molluscicide employed in UK agriculture. It acts by interfering with stomach calcium metabolism, causing mollusks to cease feeding, leading to their typical subterranean death. It is applied to soil in pellet form with bait to attract snails and slugs.

Slugs represent one of the most destructive and challenging pests to manage. They preferentially target seedlings of numerous vegetables and flowers, posing difficulties in crop establishment. Preharvest feeding by slugs on fruits and vegetables results in wounds that can lead to fungal and bacterial contamination, spoiling the crop. Due to these challenges, European farmers rely on synthetic chemicals like metaldehyde and ferric phosphate for slug control.

Europe Molluscicides Industry Overview

The Europe Molluscicide Market is fragmented, with the top five companies occupying 8.32%. The major players in this market are ADAMA Agricultural Solutions Ltd., Arxada, Doff Portland Ltd, Mitsui & Co. Ltd (Certis Belchim) and W. Neudorff GmbH KG (sorted alphabetically).

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