

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

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Abstracts

The Europe Nematicide Market size is estimated at 370.36 million USD in 2024, and is expected to reach 436.15 million USD by 2029, growing at a CAGR of 3.32% during the forecast period (2024-2029).

Soil application dominated the market exposing non-target organisms due to its benefits like protecting beneficial insects and pollinators

Nematodes that feed on plant parts are called plant parasitic nematodes (PPNs). In Europe, the most damaging plant parasitic nematodes are cyst nematodes, root-lesion nematodes, root-knot nematodes (RKNs), stem and bulb nematodes, citrus nematodes, and virus vector nematodes. Symptoms associated with this nematode infection are similar to those caused by impaired root growth and function. Therefore, they may resemble abiotic stress like drought and nutritional deficiencies, as well as biotic factors like stem and root rots. General symptoms from nematodes include yellowing, stunting, and wilting, accompanied by a yield decline.

Compared to other application methods, such as foliar application, soil application of nematodes generally poses fewer risks of exposing non-target organisms, including beneficial insects and pollinators. This is because the nematicide remains primarily in the soil, where the target nematodes reside. Owing to this, soil application dominated the market with a share of 68.4% in 2022.

Foliar applications accounted for 11.8% of the European nematicide market in 2022. The purpose of the foliar application is to control the infestation of inflorescence and

leaves by nematodes such as *Anguina tritici*, also known as seed gall disease-causing nematodes, which are present in cereals such as wheat. The foliar application was effective against the nematodes due to the use of active ingredients like methyl bromide, oxamyl, and parathion.

The increase in crop losses due to nematode infestation is increasing every year and acting as a major concern for farmers, thus encouraging them to use nematicides to protect crops. The market is anticipated to record a CAGR of 3.4% during the forecast period.

The expansion of agriculture and the increasing awareness of nematode-related crop damage are driving the growth of the segment

Europe is experiencing growth across all the countries in the nematicide market. France has a significant agricultural sector with diverse crop production. The country cultivates a wide range of crops, including grains, oilseeds, fruits, and vegetables. The importance of crop protection, including nematode control, is well-recognized in the French agricultural sector. As a result, France has been a major consumer of nematicides in Europe, contributing to its significant share in the market.

In Russia, the expansion of agriculture, along with the increasing awareness of nematode-related crop damage, has driven the growth of the nematicide market. As farmers in the country adopt more effective nematode control measures, the demand for nematicides is increasing, resulting in Russia gaining a substantial market share, which is anticipated to record a CAGR of 2.5% during 2023-2029.

Spain is expected to witness the fastest growth in the nematicide market compared to other countries, recording a CAGR of 3.0% during the forecast period (2023-2029). Spain has a strong agricultural sector, with a focus on high-value crops, such as fruits, vegetables, and ornamentals. These crops are particularly susceptible to nematode damage. As the cultivation of high-value crops expands in Spain, the demand for nematicides for effective nematode control is expected to rise, leading to growth in the market.

Considering factors such as the expansion of high-value crop cultivation, rising awareness of nematode-related crop damage, and the rising focus on the adoption of advanced agricultural practices, the demand for nematicides as an effective solution for

nematode control is expected to increase in European agriculture.

Europe Nematicide Market Trends

Growing awareness among the farmers about the importance of nematode control is increasing their application rate

In Europe, nematicides are widely used in various crop types, including agriculture, horticulture, golf courses, and sports turfs, to safeguard crops from nematode damage and mitigate potential yield losses. These nematicides can be used by soil application during planting or prior to sowing. The average consumption of nematicides in the region was 700.7 kg per hectare of agricultural land in 2022.

Nematicide usage in Europe varies across countries and agricultural practices. Italy is the largest consumer of nematicides per hectare, with an average consumption of 195.8 g per hectare of agricultural land in 2022.

In 2022, the Netherlands ranked second in terms of nematicide consumption per hectare, using 119.7 g per hectare. The Rest of Europe, Germany, and France followed with nematicide consumption rates of 109, 78.3, and 69 grams per hectare, respectively. These figures indicate the quantities of nematicides applied to control various types of nematode pests that affect crops, including root-knot nematodes, cyst nematodes, lesion nematodes, reniform nematodes, lance nematodes, and stem and bulb nematodes.

In 2022, the use of nematicides in Europe witnessed a growth of 10.8% in terms of value share compared to the previous year. This increase can be attributed to the expanding cultivation of high-value crops, including vegetables, fruits, and ornamentals, which tend to be more susceptible to nematode damage. Intensive agricultural practices like monoculture and continuous cropping contribute to the increase of nematode issues by creating favorable conditions for nematode populations to thrive in the soil. As a result, the use of nematicides becomes necessary to effectively manage and control these infestations.

Fluensulfone was priced the highest at USD 19.1 thousand per metric ton in 2022. The growing demand for Nematicides is expected to fuel the prices of active ingredients.

Nematicides play a crucial role in integrated pest management systems to combat plant-parasitic nematodes. Among various application methods, seed-applied nematicides have gained popularity in Europe and become one of the most frequently utilized techniques in row crop agriculture.

Fluensulfone, a non-fumigant nematicide falling under the fluoroalkyl chemical class, effectively controls plant-parasitic nematodes like root-knot nematodes, cyst nematodes, lesion nematodes, and dagger nematodes in cucurbits and fruiting vegetables. Its mode of action disrupts nematode nervous systems, leading to paralysis and subsequent death. By targeting nematodes, fluensulfone helps reduce their populations, mitigating potential crop damage. In 2022, fluensulfone was priced at USD 19.1 thousand per metric ton.

Abamectin, an active ingredient, was valued at USD 12.3 per thousand per metric ton in 2022. It belongs to the avermectin chemical class and demonstrates high intrinsic activity against nematodes like the root lesion nematode (*Pratylenchus penetrans*), reniform nematode (*Rotylenchus reniformis*), root-knot nematode (*Meloidogyne incognita*), and cyst nematodes (*Heterodera chacht*). It is known for its potent nematicidal properties. Even at low concentrations, abamectin inhibits nematode infections effectively.

Oxamyl is an active ingredient used as a systematic nematicide widely employed for soil nematode control. Particularly, it exhibits downward-moving systemic activity, rendering it suitable for registered foliar nematicidal applications. In 2022, oxamyl was priced at USD 8.9 thousand per metric ton.

Europe Nematicide Industry Overview

The Europe Nematicide Market is fairly consolidated, with the top five companies occupying 86%. The major players in this market are Albaugh LLC, Bayer AG, Corteva Agriscience, Syngenta Group and Tessengerlo Kerley Inc. (Novasource) (sorted alphabetically).

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