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

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Abstracts

The France Crop Protection Chemicals Market size is estimated at 2.59 billion USD in 2024, and is expected to reach 3.47 billion USD by 2029, growing at a CAGR of 5.97% during the forecast period (2024-2029).

Various social and economic factors are reasons for the increased use of herbicides in the country

France is an important agricultural country in Europe and a major producer and exporter of various agricultural products. Wheat, rye, barley, corn, sugar beets, oats, fruits, and vegetables, including apples, melons, peaches, nectarines, tomatoes, cauliflowers, carrots, onions, and salad vegetables, are produced and exported. Weeds, fungal diseases, and insect pests pose significant losses to the agricultural sector. Farmers depend on chemical pesticide products to combat these challenges and enhance production quantities. The overall consumption of crop protection chemicals occupied the second-largest market share of 16.4% in Europe, with a market value of USD 2.32 billion.

In 2022, herbicides held the largest market share in terms of pesticide consumption, accounting for 50.7% of the total volume. This dominance can be attributed to France and its overseas territories together producing around 250 varieties of crops. According to the Minist?re de l'Agriculture et de l'Alimentation, every year, on average, the country utilizes more than 29,300 metric ton of herbicides. Social and economic reasons could be other factors for the increased use of chemical herbicide products. Glyphosate is a widely used herbicide in the country.

Fungicides and insecticides also occupy the largest market shares after herbicides, i.e., 28.5% and 20.7%, respectively. Numerous fungal diseases are affecting major crops, and insect pests such as aphids are spreading these diseases from one crop to another, resulting in significant crop damage.

The increasing crop infestations and the need for higher productivity may drive the French crop protection chemicals market at a CAGR of 5.8% during the forecast period.

France Crop Protection Chemicals Market Trends

The consumption of herbicides per hectare is increasing due to their international demand and their ability to control weeds

The agricultural sector in France holds great importance within the nation's economy. However, it faces considerable challenges in the form of weeds, insect pests, and fungal infections, resulting in considerable annual reductions in crop yield. To address these issues, France used an average of 4.8 thousand g of crop protection chemicals per hectare of agricultural land in 2022.

Herbicides emerged as the primary chemical pesticide category, experiencing widespread use in the agricultural sector. The average herbicide consumption per hectare of agricultural land stood at 2.2 kg in 2022. However, the application rates and the employment of multiple herbicides increased due to the adoption of herbicide-resistant crops, including genetically modified varieties, and the need to manage weed growth and reduce yield losses.

Fungicides hold the second position in terms of pesticide consumption, as they are extensively used in the agricultural industry. The average consumption of fungicides per hectare of agricultural land in the country was 2 kg in 2022. Factors such as changing climatic circumstances have contributed to an escalated dependence on fungicides. The prevalence of fungal diseases presents a significant threat to diverse crop types, causing a substantial decline in yield and the compromised quality of harvested produce. As a result, farmers heavily depend on fungicides to control these diseases.

The increasing prevalence of insect infestations and the emergence of insect

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populations displaying resistance have spurred the need for insecticides to counter these escalating pest challenges. In 2022, the mean application rate in France stood at 0.2 kg per hectare.

Glyphosate is the most used pesticide in France, and it was priced at USD 1.15 thousand per metric ton in 2022

France is one of the highest pesticide-consuming countries in Europe and the third-largest exporter of insecticides globally. The country exports most of its insecticides to Belgium, the Netherlands, and Brazil.

Recently, France witnessed an escalation in the prices of active ingredients, particularly in the case of insecticides. Cypermethrin and emamectin benzoate were valued at USD 21.2 thousand per metric ton and USD 17.4 thousand per metric ton in 2022, respectively. These insecticides experienced a significant price increase of 21.5% between 2019 and 2022.

As of 2022, metalaxyl was priced at USD 4.5 thousand per metric ton. It is one of the most effective systemic fungicides against oomycetes. It is widely used as a soil or seed treatment to control Pythium and Phytophthora seed rot and damping-off. It also serves as a soil treatment for controlling Phytophthora stem rots and cankers in annuals and perennials and offers efficacy against certain downy mildews.

Glyphosate retains its position as the most extensively used pesticide in France. In 2023, the country banned the sale of two weedkillers containing glyphosate produced by Swiss chemical group Syngenta due to a lack of analysis on the chemical's potential harm to wildlife, as the company did not submit the mandatory risk assessment on the impacts on bees, other insects, soil, and water life.

Pendimethalin, a selective herbicide, is applied before emergence in cereals, maize, and rice and with shallow soil incorporation before seeding beans, cotton, soybeans, and groundnuts. In vegetable crops, it is applied before emergence or transplanting. Notably, the price of this herbicide saw a substantial increase of 37.8% to USD 3.3 thousand per metric ton in 2022 compared to 2019.

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France Crop Protection Chemicals Industry Overview

The France Crop Protection Chemicals Market is fairly consolidated, with the top five companies occupying 66.31%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Nufarm Ltd and Syngenta Group (sorted alphabetically).

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