

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

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Abstracts

The Germany Crop Protection Chemicals Market size is estimated at 3.31 billion USD in 2024, and is expected to reach 4.09 billion USD by 2029, growing at a CAGR of 4.34% during the forecast period (2024-2029).

The need to minimize the losses caused due to the attack of insects and pests may drive the market

Germany is the third-largest producer of agricultural goods in the European Union, following France and Italy.

Insecticides dominated the market and accounted for 63.3% of the German crop protection chemicals market in 2022. However, the prevalence of insect pests can vary over time and may change due to changing climate, agricultural practices, and pest management strategies. Some major insect pests known to cause crop losses in Germany include the Colorado potato beetle, cabbage white butterfly, western corn rootworm, aphids, European corn borer, and apple codling moth. Carbamates and pyrethroids are the most commonly used insecticide-active ingredients.

Herbicides accounted for 20.4% of the German crop protection chemicals market in 2022. Herbicides have two types, based on the time of application. Pre-plant herbicides are applied to the soil before planting to control the weeds before the crops are sown. These are typically selective and non-selective herbicides. The herbicide-treated land can then be used for agricultural purposes to grow crops. Pre-emergence herbicides

can be applied before the weed seedlings emerge from the soil. When applied, these herbicides control the weeds as they grow out of the soil. However, they do not affect the weeds that are already grown.

With the increasing demand for food in Germany, the country's pressure to produce sufficient food is increasing, which comes with the need to minimize the losses caused by the attack of insects and pests. The market is anticipated to register a CAGR of 3.7% during the forecast period.

Germany Crop Protection Chemicals Market Trends

Increasing pest proliferation is leading to higher application of pesticides

In 2022, there was a notable rise in pesticide consumption per hectare in Germany, showing a significant increase of 6.4 thousand g per hectare. This considerable uptick can be mainly attributed to the profound effects of climate variations, marked by increased instances of droughts, heatwaves, and other circumstances that encourage the spread of fungal infections, weeds, and insect pests.

In Germany, insects present a significant challenge to agriculture by affecting a range of crops, including wheat, rice, cotton, fruits, and vegetables. Their presence leads to considerable damage, resulting in lower yields and inferior quality production. This situation places farmers under financial strain and raises concerns about possible food scarcity. Insecticides take the forefront in terms of pesticide usage, with an average consumption of 2.4 thousand g per hectare in 2022. This trend reflects the necessity to counter insects and mitigate their detrimental effects on crop production.

Fungicides take the second spot in pesticide consumption in Germany. The year 2022 recorded an average application of 2.2 thousand g per hectare. The prevalence of fungicide use in German agriculture is attributed to the nation's strong dependence on agricultural methods and the necessity to shield crops from fungal infections. Fungicides are crucial in managing diseases that can harm crops and diminish yields.

In 2022, the rate of herbicide application per hectare averaged 1.8 thousand g. This phenomenon is a result of recognizing the advantageous and economically viable nature of using herbicides to improve crop yields in both quantity and quality. This approach effectively controls weed proliferation while also reducing labor costs.

The most commonly used herbicide glyphosate is expected to be banned by 2024 due to environmental concerns, as well as to preserve clean habitats for insects

Cypermethrin and emamectin benzoate are some of the major active ingredients that are witnessing an increase in prices. In 2022, cypermethrin was priced at USD 21.3 thousand per metric ton, reflecting a 14.6% increase from 2020. This synthetic pyrethroid exhibits both contact and stomach action, effectively controlling a broad spectrum of insects, including lepidoptera, coleoptera, diptera, and hemiptera. It is suitable for managing defoliating caterpillars and fruit borers.

Between 2019 and 2022, the price of emamectin benzoate rose by 6%. This active ingredient-based insecticide is used in vegetables, cotton, and tobacco to combat damaging lepidopteran pests like armyworms, pinworms, diamondback moths, fruit worms, and leafrollers.

Azoxystrobin, priced at USD 4.6 thousand per metric ton in 2022, serves as a broad-spectrum systemic fungicide widely utilized in agriculture, particularly in cereals. It provides protection against various diseases. Notably, Germany imports most of its azoxystrobin from India.

Germany predominantly exports metalaxyl to India, Vietnam, and Peru. It exhibits both protective and curative action, targeting diseases caused by *Pseudoperonospora humuli* in hops, *Phytophthora infestans* in potatoes and tomatoes, *Plasmopara viticola* in vines, *Bremia lactucae* in lettuce, and downy mildew in various vegetables.

Glyphosate, the most commonly used herbicide in Germany, was priced at USD 1.2 thousand per metric ton in 2022. In response to environmental concerns and to preserve clean habitats for insects, the German cabinet approved legislation to ban glyphosate from 2024. Farmers in Germany are expected to gradually reduce their usage of glyphosate and cease its use completely by 2024.

Germany Crop Protection Chemicals Industry Overview

The Germany Crop Protection Chemicals Market is fairly consolidated, with the top five

companies occupying 68.43%. The major players in this market are ADAMA Agricultural Solutions Ltd, BASF SE, Bayer AG, Syngenta Group and Wynca Group (Wynca Chemicals) (sorted alphabetically).

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