

India Fungicide - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The India Fungicide Market size is estimated at 219.00 million USD in 2024, and is expected to reach 266.50 million USD by 2029, growing at a CAGR of 4.00% during the forecast period (2024-2029).

The rising fungal diseases are driving the demand for fungicides in various application methods

Fungicides can be applied using a variety of methods, depending on the specific requirements and diseases. These methods include chemigation, foliar application, fumigation, and seed and soil treatments. These diverse application methods play a crucial role in effectively applying fungicides to various crops, depending on the conditions.

In 2022, foliar application dominated the fungicide application segment, which held the largest market share of 60.9%. This method was highly preferred as it provides efficient protection against foliar fungal diseases by directly targeting pathogens on leaves. The foliar application facilitates swift penetration and absorption of fungicides into the plant tissues, ensuring their effective action against fungal pathogens.

Fungicide seed treatments are extensively employed to combat fungal infections in the early stages of plant development. These treatments provide a protective barrier around the seeds, effectively preventing a range of diseases such as seed rots, seedling blights, damping off, and root rots. The fungicide seed treatments segment held a market share of 13.8% in the Indian fungicide market in 2022.

Grains and cereal crop growers are majorly adopting all the application methods in their cultivation based on the crop stage and insect pests as these crops are more susceptible to insect pests. Foliar insecticide application was majorly adopted by the farmers in these crops.

The selection of the application mode is influenced by various factors, including the specific target disease, crop type, disease stage, and the availability of equipment. The fungicide market is expected to register a CAGR of 3.9% during the forecast period.

India Fungicide Market Trends

The changing climate and rising disease pressure are expected to drive the consumption of fungicides

India is a significant consumer of crop protection chemicals, including fungicides. The country's agricultural sector is large, with diverse types of crops being cultivated, leading to a substantial demand for fungicides. Fungal diseases can significantly reduce agricultural output and quality, resulting in considerable crop losses. Fungicides are essential in the prevention and management of various diseases, maintaining the health and productivity of agricultural production. In 2022, the consumption of fungicides in India per hectare accounted for 101.5 g/ha.

India has a high crop diversity, ranging from staple food crops like rice and wheat to cash crops like cotton, fruits, and vegetables, creating a varied disease spectrum. Rust, blight, mildew, and rot are a few examples of the devastating effects of fungal diseases on these crops. To mitigate the risks and protect their crops, farmers in India rely on fungicides as an important tool in their disease management strategies.

Crop intensity is rising in India because of changing agricultural practices and increased food demand. Farmers frequently engage in repeated cropping or increase the number of crop cycles every year. This intensification leads to a higher risk of disease outbreaks, including fungal diseases, and, consequently, a greater need for fungicides. The consumption of fungicides in India per hectare increased by 5.0% from 2017 to 2022.

The Indian government has developed several plans and programs to encourage the

use of crop protection chemicals such as fungicides. The government has pushed farmers to utilize fungicides for disease management through subsidies, extension services, and training programs.

Climatic changes altering fungal survivability and infectivity as well as host susceptibility, leading to new disease outbreaks

Fungal diseases are a major threat to important crops. Fungal pathogens cause large yield losses in different crops in India. They are known to be yield-limiting factors in cereals. The fungal infections-related decline in crop yield in India is believed to be approximately 5.0 million tons per year.

Mancozeb is a broad-spectrum contact fungicide used to control fungal diseases like eyespot, ringspot, blast, scab, leaf mold, powdery mildew, stem boi, stem rot, brown rot, white stem rot, and black stem rot in corn, rice, wheat, vegetables, fruit, sugarcane, and tobacco crops. It was valued at USD 7.7 thousand per metric ton in 2022.

Propineb is a contact fungicide valued at USD 3.5 thousand per metric ton in 2022. It is used to control various diseases like scab early & late blight dieback, buckeye rot, downy mildew, fruit spots, and brown, narrow leaf spot diseases in apple, potato, chili, and tomato crops.

Ziram is a basic contact foliar fungicide priced at USD 3.2 thousand per metric ton in 2022. It mainly controls early & late blight of potatoes/tomatoes, downy mildew and black rot of vines and cucurbits, scab of apples, Sigatoka of bananas, and melanose of citrus.

Climatic changes can affect fungal survivability, infectivity, and host susceptibility, resulting in new disease outbreaks. For instance, the warming trend in climate along the Indian subcontinent's west coast, central, interior peninsula, and northeast regions creates favorable conditions for maize diseases like sorghum downy mildew (SDM) and turicum leaf blight (TLB). These factors are expected to influence the prices and demand for fungicides.

India Fungicide Industry Overview

The India Fungicide Market is moderately consolidated, with the top five companies occupying 51.31%. The major players in this market are Bayer AG, PI Industries, Rallis India Ltd, Syngenta Group and UPL Limited (sorted alphabetically).

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