

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

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Abstracts

The Indonesia Crop Protection Chemicals Market size is estimated at 159.90 million USD in 2024, and is expected to reach 195.91 million USD by 2029, growing at a CAGR of 4.15% during the forecast period (2024-2029).

Insecticides dominate the Indonesian crop protection chemicals market

Given its natural resources and the right climatic conditions, Indonesia is one of the most important agricultural markets in Asia. In particular, demand for crop protection chemicals has been stimulated by a greater emphasis on yield as the primary instrument of achieving food security. The Indonesian crop protection chemicals market grew steadily, increasing by USD 53.7 million in value during the historical period (2017-2022).

Crop protection chemicals have become increasingly common in this country due to the expansion of agricultural land and advancements in farming techniques. Indonesia is the largest producer of palm oil globally and ranks fourth in coffee production. The use of crop protection chemicals in rice production remains high.

Insecticides held the largest share of 73.36% by value in 2022. Farmers must have access to a diverse range of registered pesticide groups, which enables them to rotate among the groups in the field. Until February 2021, there were 1,059 insecticide brands registered in Indonesia, consisting of 80 different active ingredients. More than 90% of active ingredients registered in Indonesia consist of a combination of pyrethroids,

organophosphates, avermectins, and milbemycins.

The government is promoting the precision agriculture industry in Indonesia to boost its GDP, as agriculture plays a significant role in the economy. This move has had a positive impact on the crop protection chemicals market in the country. Owing to the increase in pest infestations and rise in awareness among farmers, coupled with the adoption of new farming practices and a demand to maintain food safety and quality, the crop protection chemicals market in the country is anticipated to record a CAGR of 4.1% during the forecast period (2023-2029).

Indonesia Crop Protection Chemicals Market Trends

Increased number of herbicide-resistant weed species has increased the herbicide consumption per hectare

Indonesia stands out as a prominent agricultural country, distinguished by its abundance of fertile land and tropical climate, both of which create advantageous conditions for cultivating a wide variety of crops. However, the agricultural sector in the country faces numerous challenges, including weed infestation, insect pests, and fungal diseases. To address these issues and bolster crop production, Indonesian farmers are heavily relying on pesticide products as a means of controlling crop losses.

The per hectare consumption of herbicides has witnessed a significant 2.7% increase during the historical period. This surge is primarily attributed to the escalating weed infestation observed in major crops. Disturbingly, these invasive weeds are causing substantial annual yield losses, ranging from 10% to a staggering 60%, depending on the specific crop and its associated environment. In order to combat these detrimental losses, farmers have increasingly turned to herbicides as their primary method of control. However, the continuous application of herbicides on crops has led the weeds to develop resistance against these chemical agents. This consequence has resulted in increased consumption of herbicides and an elevated application rate per hectare, exacerbating the challenge faced by Indonesian farmers.

The per hectare consumption of fungicides, insecticides, and other pesticide products remains relatively stable without any significant changes. However, the overall usage of pesticides per hectare in the country is increasing due to the expansion of agricultural activities. This upward trend can be attributed to a lack of regulations that set limits on

the maximum residual use of pesticides. As a result, the consumption of pesticides per hectare is on the rise.

Pesticide manufacturers may pass on the increase in active ingredient prices to consumers, resulting in higher pesticide prices

The price of active ingredients directly affects the cost of producing pesticides. When the price of active ingredients rises, pesticide manufacturers may pass on these increased costs to consumers, resulting in higher pesticide prices.

Cypermethrin was valued at USD 20.9 thousand per metric ton in 2022. It is a synthetic pyrethroid used as an insecticide in large-scale commercial agricultural applications and is very effective in controlling the insects immediately after application, even at lower doses. It is also effective in controlling diseases by insects such as spotted ball worms, pink ball worms, early spot borers, and hairy caterpillars. The availability of alternatives to cypermethrin can impact its pricing.

Atrazine witnessed a significant increase in its price, valued at USD 9.9 thousand per metric ton in 2022. It is used to stop pre- and post-emergence broadleaf and grassy weeds in crops, with the highest use on field corn, sweet corn, sorghum, and sugarcane. It is projected that atrazine can raise crop production by up to 6% by managing weeds. Due to these factors, the prices of this active ingredient may have gone up in recent years in line with the rising demand. Farmers' decisions on herbicide usage can be affected by active ingredient prices. Higher prices may lead farmers to explore alternative herbicide applications.

As of 2022, the price of mancozeb chemical fungicide was valued at approximately USD 7.7 thousand per metric ton. It is a contact fungicide that has the ability to provide protection for a wide range of crops, including fruits, vegetables, nuts, and field crops. It is also commonly utilized in professional turf management. Its versatility and effectiveness make it a valuable tool for farmers and other professionals to protect crops.

Indonesia Crop Protection Chemicals Industry Overview

The Indonesia Crop Protection Chemicals Market is moderately consolidated, with the top five companies occupying 62.16%. The major players in this market are ADAMA Agricultural Solutions Ltd, Bayer AG, FMC Corporation, Syngenta Group and UPL limited (sorted alphabetically).

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Contents

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Consumption Of Pesticide Per Hectare

4.2 Pricing Analysis For Active Ingredients

4.3 Regulatory Framework

4.3.1 Indonesia

4.4 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (INCLUDES MARKET SIZE IN VALUE IN USD AND VOLUME, FORECASTS UP TO 2029 AND ANALYSIS OF GROWTH PROSPECTS)

5.1 Function

5.1.1 Fungicide

5.1.2 Herbicide

5.1.3 Insecticide

5.1.4 Molluscicide

5.1.5 Nematicide

5.2 Application Mode

5.2.1 Chemigation

5.2.2 Foliar

5.2.3 Fumigation

5.2.4 Seed Treatment

5.2.5 Soil Treatment

5.3 Crop Type

5.3.1 Commercial Crops

5.3.2 Fruits & Vegetables

5.3.3 Grains & Cereals

- 5.3.4 Pulses & Oilseeds
- 5.3.5 Turf & Ornamental

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global level Overview, Market level overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and analysis of Recent Developments)
 - 6.4.1 ADAMA Agricultural Solutions Ltd
 - 6.4.2 BASF SE
 - 6.4.3 Bayer AG
 - 6.4.4 Corteva Agriscience
 - 6.4.5 FMC Corporation
 - 6.4.6 Nufarm Ltd
 - 6.4.7 PT Biotis Agrindo
 - 6.4.8 Syngenta Group
 - 6.4.9 UPL limited
 - 6.4.10 Wynca Group (Wynca Chemicals)

7 KEY STRATEGIC QUESTIONS FOR CROP PROTECTION CHEMICALS CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (DROs)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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