

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

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Abstracts

The Indonesia Fungicide Market size is estimated at 13.95 million USD in 2024, and is expected to reach 16.67 million USD by 2029, growing at a CAGR of 3.62% during the forecast period (2024-2029).

Growing fungal diseases damages major crops, like palm oil, coffee, rice, and maize, increasing the fungicide adoption rate

Indonesia's tropical climate provides an ideal environment for crop cultivation and the rapid proliferation of fungal diseases, posing significant challenges to the agricultural sector. In response, farmers in the country are employing various methods to combat these fungal diseases, with fungicides being an effective solution. Depending on the specific disease and crop stage, farmers are implementing different application modes to control and mitigate the impact of these diseases.

Farmers predominantly adopted the foliar application method, which represented a significant market share of 61.2% in 2022. This preference can be attributed to effective disease control and additional benefits to plant health, including improved growth efficiency and stress tolerance, resulting in enhanced productivity throughout the growing season.

Seed treatment fungicides are suitable to combat soil-borne diseases in crops like palm oil, coffee, rice, and maize. This proactive approach enables growers to effectively control diseases at the early crop stage, mitigating their impact on crop health and yield. In 2022, the consumption of seed treatment fungicides represented a share of 13.7%.

The chemigation application mode occupied the market value share of 12.2% in 2022, which is majorly attributed to the country's top priority on modernizing the irrigation systems, and 95% of the country's rice is produced from these irrigation systems. The rising adoption of modern irrigation systems further increases the adoption of chemigation modes for applying fungicides.

Farmers utilize other fumigation and soil treatment as alternative modes of applying fungicides to their crops, selecting the appropriate method based on the specific fungal disease and crop type.

Indonesia Fungicide Market Trends

Growing crop infestations due to fungal diseases in major crops like maize and need for increasing higher productivity may drive the market

Indonesia cultivates various high-value crops, such as fruits, vegetables, coffee, tea, and spices. These crops are often susceptible to fungal diseases that can directly impact their quality and marketability. Fungicides help protect these valuable crops and ensure their productivity and economic value.

With the aim of increasing productivity, many farmers have adopted intensive agricultural practices, such as high-yield crop varieties and greenhouse cultivation. These practices, while beneficial for increasing yields, can also create favorable conditions for the development and spread of fungal diseases. Fungicides are necessary to control and prevent these diseases in intensive production systems. Fungicide consumption in Indonesia has increased in recent years. Specifically, between 2017 and 2022, there was a significant growth of 28.7% in fungicide usage.

Fungi can evolve and develop resistance to pesticides over time. This has necessitated the use of new and more effective fungicides to combat resistant fungal strains and maintain effective disease control. For instance, in Indonesia, the output of maize is severely constrained by downy mildew brought on by *Peronosclerospora* spp. Susceptible varieties can have yield losses of around 90 to 100%. Downy mildew has developed resistance due to the continual usage of metalaxyl. As a result, it is essential to have other fungicides that may be used in place of metalaxyl.

Climate change has led to shifts in weather patterns, including changes in temperature, humidity, and rainfall. These changes can influence the prevalence and severity of fungal diseases. Fungicides are used to manage diseases that thrive under altered climatic conditions, helping farmers protect their crops from disease-related losses.

Government policies related to trade, agriculture, and chemical imports can impact the import process and may affect the prices of imported fungicides

Mancozeb, ziram, and propineb are widely used fungicides in Indonesia. These fungicides belong to the dithiocarbamate group and are known for their broad-spectrum control of fungal diseases in various crops.

Mancozeb is a contact fungicide that is used on a variety of crops, including fruits, vegetables, nuts, and field crops, and professional turf management. It is effective against many types of fungal diseases, such as potato blight, leaf spot, scab, and rust. Additionally, it can be used as a seed treatment for potatoes, corn, sorghum, tomatoes, and cereal grains. India is a major supplier of mancozeb to Indonesia. In 2022, the price was valued at USD 7.7 thousand per metric ton and significantly increased by 14.9% from 2019.

Propineb is a systemic and contact fungicide used to control fungal diseases in various crops, such as grapes, vegetables, and tree fruits. It is effective against diseases like downy mildew, gray mold, and powdery mildew. The price in 2022 accounted for USD 3.5 thousand per metric ton.

Ziram is another dithiocarbamate fungicide that was valued at USD 3.3 thousand per metric ton, and this fungicide is widely used for disease control in various crops, including citrus, apples, and potatoes. It is particularly effective against diseases caused by certain fungi, including early and late blight in potatoes.

The country is one of the major importers of fungicides, and most of its fungicides are imported from India, the United States, and China. Government policies related to trade, agriculture, and chemical imports can impact the import process and may affect the prices of imported fungicides.

Indonesia Fungicide Industry Overview

The Indonesia Fungicide Market is fairly consolidated, with the top five companies occupying 68.43%. 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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