

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

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Abstracts

The Indonesia Herbicide Market size is estimated at 27.74 million USD in 2024, and is expected to reach 38.07 million USD by 2029, growing at a CAGR of 6.53% during the forecast period (2024-2029).

Traditional method of applying herbicides through soil treatment mode and its effectiveness in controlling weeds in early growth stage may increase the adoption

The herbicide market in Indonesia is driven by several factors, such as increasing agricultural activities, the need for weed control in various crops, and the adoption of advanced agricultural practices.

The market is dominated by the soil treatment segment, which is expected to record a CAGR of 6.6%, by value, during the forecast period (2023-2029) as farmers recognize the benefits of soil treatment in weed management. Soil treatment offers effective weed control and lower weed competition, contributing to better crop establishment.

Foliar application is a commonly used method in Indonesia. The herbicide market is expected to increase by a value of USD 3.9 million during the forecast period (2023-2029). The need to obtain large yields and retain crop quality is the major driver for using herbicides by foliar application. Weed disturbance affects low crop yields, both quality and quantity, and farmers want to protect their investment through the use of herbicides in integrated pest management strategies to ensure a profitable harvest.

The chemigation method is anticipated to witness notable growth in the coming years

due to the increasing adoption of irrigation systems and the advantages of chemigation for precise and effective weed control.

The market share of fumigation in Indonesia's herbicide market is expected to record a CAGR of 5.8% during the forecast period (2023-2029). Farmers are looking for more efficient and effective ways to combat weeds and enhance crop yields. They are expected to continue the adoption of foliar as a preferred method in the coming years due to its benefits in achieving effective weed control.

Indonesia Herbicide Market Trends

Growing weed infestation in major crops like rice and extending cultivation areas under this crop may drive the market

Herbicide use in Indonesia has seen a notable increase in recent years. There has been a significant rise in herbicide consumption, indicating a growing demand for these products in agricultural practices and weed control. Between 2017 and 2022, herbicide consumption per hectare in Indonesia witnessed a significant growth of 30.7%. This increase can be attributed to farmers' heightened awareness of the benefits of herbicides and their desire to enhance the average agricultural output per hectare. The wide availability of a diverse range of herbicides in the market has contributed to the rise in herbicide usage.

In Indonesia, like in many other countries, the development of resistant weeds to herbicides is a concern in agricultural practices. Over time, repeated and exclusive use of certain herbicides can lead to the emergence of herbicide-resistant weed populations. These resistant weeds are able to survive and reproduce even when herbicides are applied, making weed control more challenging for farmers.

For instance, the most troublesome weed in rice fields is the Chinese sprangletop (*Leptochloa chinensis* (L.) Nees). Most lowland rice farmers in Indonesia habitually apply large dosages of herbicides repeatedly without rotation, resulting in increased resistance in Chinese sprangletop.

The cultivation of herbicide-tolerant crops allows farmers to employ herbicides with different modes of action, enabling effective weed management and reducing yield losses caused by weed competition. This, in turn, has led to higher application rates and

the use of multiple herbicides in order to achieve better weed control and maximize crop productivity.

The increasing demand for herbicides and import tariffs are majorly altering the active ingredient prices in the country

The price of atrazine in the Indonesian herbicide market has observed a noteworthy surge of 37.9% to USD 13.8 thousand per metric ton between 2020 and 2022. Atrazine is a herbicide that is utilized for controlling broadleaf and grassy weeds in various crops, with its highest usage in field corn, sweet corn, sorghum, and sugarcane. By effectively managing weeds, this herbicide can enhance crop production by up to 6%.

Paraquat is a herbicide that farmers widely use to save arduous labor, protect against invasive weeds, and produce agronomically important crops like soy, corn, and cotton, among others. Paraquat dichloride is a non-selective contact herbicide currently used by farmers in Indonesia to control weeds on plantations, such as palm oil, rubber, and cocoa.

Glyphosate was valued at USD 1.1 thousand per metric ton in 2022. It is a commonly used herbicide in Indonesia, and farmers heavily rely on it to manage and eradicate weeds and other unwanted plants in their crops. However, a lack of proper rotation of herbicide types has resulted in a heightened risk of resistant weed emergence. This poses a significant threat to crop production and may have negative consequences for the market demand for glyphosate, potentially impacting its pricing in the years to come.

The herbicide market in Indonesia heavily depends on imports from various countries. In particular, China, Malaysia, the United States, Germany, and India are the top importers of herbicides to Indonesia. These importing countries play a crucial role in meeting the herbicide demands of the country's agricultural sector.

Indonesia Herbicide Industry Overview

The Indonesia Herbicide Market is moderately consolidated, with the top five companies occupying 64.78%. The major players in this market are BASF SE, Bayer AG, FMC Corporation, Syngenta Group and UPL Limited (sorted alphabetically).

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