

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

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Abstracts

The Pakistan Crop Protection Chemicals Market size is estimated at 243.99 million USD in 2024, and is expected to reach 284.53 million USD by 2029, growing at a CAGR of 3.12% during the forecast period (2024-2029).

Insecticides dominate the Pakistani crop protection chemicals market

In Pakistan, the agricultural sector employs over 40.0% of the country's workforce and is a crucial driver of economic growth. Pakistan is among the top 10 producers of wheat, cotton, sugarcane, mango, dates, and Kinnow oranges, ranking 10th in rice production globally. Major crops (wheat, rice, cotton, and sugarcane) contribute around 4.9%, while other crops contribute 2.1% to the country's GDP.

Pakistan has two cropping seasons. Kharif is the first sowing season, starting in April, and sowing takes place till June. These crops are harvested from October to December. During this season, rice, sugarcane, cotton, maize, moong, mash, bajra, and jowar are the major crops grown. During rabi, the second season, sowing begins from October to December and is harvested from April to May. These crops comprise wheat, gram, lentil (masoor), tobacco, rapeseed, barley, and mustard.

Pink bollworm is a dominant pest in the Kharif season. Wheat aphids, fall armyworms, and white flies cause significant crop losses in the rabi season. As a result, insecticides dominate, accounting for a 54.9% share in the Pakistani crop protection chemicals market in 2022.

In Pakistan, 20-30% of crop losses are due to weed infestation. The primary weeds that cause yield losses include *Phalaris minor*, *Chenopodium album*, *Convolvulus arvensis*, barnyard grass, wild oats, and *Cyperus rotundus*. In 2022, herbicides represented a 22.2% share in the Pakistani crop protection chemicals market.

The increase in the need for food security, owing to the rapidly growing population in the country, coupled with farmers adopting integrated pest management techniques, will likely drive the crop protection chemicals market, resulting in an anticipated CAGR of 3.8% during the forecast period.

Pakistan Crop Protection Chemicals Market Trends

Growing infestations by fungal diseases in major crops like wheat, rice, and cotton increased the fungicide consumption per hectare in the country

Pakistan has a diverse range of agricultural practices and cultivates various crops across different regions. The country's climate and soil conditions support the cultivation of a wide variety of crops. Pests pose a significant threat to crop production, leading to reduced yields and potential crop failures. To combat these challenges, the country used an average of 0.4 kilograms of crop protection chemicals per hectare of agricultural land in 2022.

Fungal diseases pose a major threat to agriculture in Pakistan, impacting crops such as wheat, rice, cotton, fruits, and vegetables. These diseases result in substantial crop losses, reduced yields, and poor-quality produce. As a consequence, farmers experience financial hardships and potential food shortages. Fungicides hold the leading position in terms of pesticide consumption, with an average consumption of 165.3 grams per hectare in 2022. This trend reflects the need to combat fungal diseases and mitigate their detrimental effects on crop production.

Insecticides hold the second leading position in terms of pesticide consumption. In 2022, the average amount of insecticides applied per hectare was 155.3 grams. Insecticide usage in agriculture in Pakistan is prevalent due to the country's heavy reliance on agricultural practices and the need to protect crops from insect pests. Insecticides are used to control various pests that can cause damage to crops, reduce yields, and threaten food security.

The application rate of herbicides per hectare in 2022 was 100.9 grams per hectare. This can be attributed to the growing awareness of herbicide usage as a beneficial and cost-effective method for enhancing crop yields in terms of both quantity and quality by effectively managing weed growth and minimizing labor expenses.

Increased crop losses due to various pests and diseases and growing demand for pesticides for better management are boosting the prices of active ingredients

Cypermethrin takes the lead as the primary insecticide utilized in the country, being a synthetic pyrethroid effective against a wide range of insect pests, including whiteflies, aphid hoppers, bollworms, jassids, thrips, mites, cutworms, pod borers, leaf miners, and psylla. India and China are the primary exporters of cypermethrin to Pakistan. As of 2022, the price of this active ingredient surged to USD 21,137.1 per metric ton after witnessing an increasing trend Y-o-Y. This price surge is mainly driven by the rising demand for cypermethrin in crops like sugarcane, cotton, fruits, and vegetables and its limited production capacities in the country.

Atrazine holds a prominent position as a widely used herbicide in the country, belonging to the chlorinated herbicide of the triazine class. It serves as a pre-emergence herbicide, effectively controlling a wide range of annual grasses and some annual broadleaf weeds in crops such as maize, beans, sunflowers, and sugarcane. The active ingredient's price has consistently grown Y-o-Y due to its extensive application across different crops. As of the latest recording in 2022, the price stood at USD 13,816.0 per metric ton.

Glyphosate takes the second spot as the most widely used herbicide, with a price standing at USD 1,144.1 per metric ton. Many farmers prefer to use this active ingredient because it is the most affordable and cost-effective solution for weed control.

Mancozeb serves as both a curative and preventive fungicide and targets a broad spectrum of fungal diseases in cereal crops, fruits, vegetables, and pulses. With its current price standing at USD 7,767.0 per metric ton, Mancozeb ranks as one of the primary fungicide active ingredients widely employed in the country.

Pakistan Crop Protection Chemicals Industry Overview

The Pakistan Crop Protection Chemicals Market is fairly consolidated, with the top five companies occupying 74.40%. The major players in this market are BASF SE, Bayer AG, FMC Corporation, Pakistan Agro Chemicals Private Limited and UPL Limited (sorted alphabetically).

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