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

https://marketpublishers.com/r/UA33A20C73AFEN.html
Date: July 2024
Pages: 208
Price: US$ 4,750.00 (Single User License)
ID: UA33A20C73AFEN

Abstracts

The UK Crop Protection Chemicals Market size is estimated at 359.41 million USD in 2024, and is expected to reach 405.89 million USD by 2029, growing at a CAGR of 2.46% during the forecast period (2024-2029).

Increasing pests and disease infestations in the country are leading to severe yield losses and driving the market for different crop protection chemicals

The UK fungicide market was valued at USD 182.9 million in 2022. It was the most consumed among crop protection chemicals, with a market share of 53.2% in the same year.

The most extensively used fungicide formulations in the United Kingdom include chlorothalonil, epoxiconazole, prothioconazole, and tebuconazole. Septoria tritici is UK wheat's most damaging foliar disease, causing yield losses that range from 30% to 50% in high-pressure seasons. Many wheat growers have increased the use of fungicides in their crops to mitigate yield loss.

Weeds impact UK crops like cotton and winter wheat. They cause a 30% yield loss in cotton, the main fiber crop. Black grass (Alopecurus myosuroides), a native weed, frequently infests UK farms. Severe infestations force farmers to abandon winter wheat, the main cereal crop. Weeds compete for resources, hinder crop growth, and reduce yields, causing economic losses and leading to the adoption of herbicides. Herbicides accounted for 38.2% of the UK crop protection chemicals market in 2022.

The changing climate and rising temperatures are causing an increase in the population and feeding habits of insect pests. A study reveals that as heat stress on crops intensifies, cereal yields in the United Kingdom are projected to decline by approximately 10% with a 2 °C increase in temperature. Consequently, these circumstances are prompting farmers in the country to rely on insecticides to manage pest pressures.

Increasing pests and disease infestations in the country have led to severe yield losses, thus driving the market for different crop protection chemicals based on farmers' needs. The market is estimated to register a CAGR of 2.4% during the forecast period (2023-2029).

UK Crop Protection Chemicals Market Trends

The United Kingdom is experiencing a decline in the consumption of pesticides due to various factors, including the adoption of non-chemical alternatives by farmers

The United Kingdom is experiencing a decline in the consumption of pesticides. From 2017 to 2022, the consumption per hectare decreased by 243.8 thousand metric ton due to changes in the area of cultivation to livestock farming, withdrawal of certain active substances, the impact of the weather on pest and disease levels, and the adoption of non-chemical alternatives by farmers.

The rising pressure on the United Kingdom to reduce the use of pesticides could impact the consumption of pesticides in the coming years. The government is taking several initiatives to reduce the use of pesticides. For instance, in January 2018, the UK government launched "A Green Future: Our 25-Year Plan" to improve the environment and increase the uptake of integrated pest management (IPM) and sustainable crop protection.

In 2020, the use of glyphosate in UK farming grew by 16% over four years in terms of weight, the area treated, and application rate per hectare despite being linked to causing cancer and the government plans to reduce reliance on conventional chemicals due to rising pre-harvest desiccation (where crops are artificially dried using glyphosate) and/or an increase in no-till agriculture, which tends to rely upon glyphosate and other herbicides to deal with weeds without releasing carbon from the soil via plowing.

Similarly, the use of the fungicide imazalil increased by 53%, while the land area treated with the chemical rose by 63% to more than 81,000 ha during the same period.

Changing climate, pests and diseases, and harvest losses could drive the consumption of pesticides to protect crops and reduce pest yield losses, as plant diseases and pests can have a significant impact on agriculture production.

Regulatory changes and the government’s focus on reducing pesticides may influence the prices of crop protection chemicals

Cypermethrin and emmamectin benzoate are significant insecticide ingredients used on a large scale. In 2022, these ingredients were priced at USD 21.1 thousand per metric ton and USD 17.3 thousand per metric ton, respectively.

Metalaxyl, valued at USD 8.7 thousand per metric ton in 2022, is a systemic phenylamide fungicide known for its protective and curative mode of action. It works by suppressing sporangial formation, mycelial growth, and the establishment of new infections. It disrupts fungal nucleic acid synthesis - RNA polymerase 1. This fungicide is recommended for foliar spray on tropical and sub-tropical crops, as a soil treatment for controlling soil-borne pathogens, and as a seed treatment to manage downy mildew.

Glyphosate, widely used by farmers as a herbicide for weed control and as an alternative to plowing, has been observed to disrupt the soil ecosystem and release carbon. In the United Kingdom, its usage in farming witnessed a growth of 16% over four years till 2020, with regenerative farming practices encouraging reduced plowing. The area of land sprayed with pesticides expanded by 9% (230,000 ha). Wheat farms are notable users of glyphosate for crop desiccation before harvest. In 2022, the price of glyphosate experienced a 2.2% increase compared to the previous year.

Pendimethalin, a selective herbicide, belongs to the dinitroaniline herbicide family. It is used to control a broad range of weeds, including annual and perennial grasses, broadleaf species, and woody species in various horticultural crops, turf, and forestry. In 2022, pendimethalin was priced at USD 3.3 thousand per metric ton.

UK Crop Protection Chemicals Industry Overview

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The UK Crop Protection Chemicals Market is moderately consolidated, with the top five companies occupying 62.22%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Nufarm Ltd and Syngenta Group (sorted alphabetically).

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