

US Turf and Ornamental Protection - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The US Turf and Ornamental Protection Market size is estimated at 2.67 billion USD in 2024, and is expected to reach 3.33 billion USD by 2029, growing at a CAGR of 4.55% during the forecast period (2024-2029).

An increase in the number of floriculture producers drives the usage of crop protection chemicals

The turf and ornamental segment accounted for 13.1% of the total US crop protection chemicals market in 2022. This segment encompasses a wide range of spaces, including parks, gardens, sports fields, and landscaping. These areas commonly encounter difficulties related to pests that can impact their aesthetic appeal and overall health.

In 2021, 9,558 floriculture producers spread across 17 states in the United States. Within those 17 states, the number of producers witnessed an 8% rise from the previous year. The highest sales were recorded in annual bedding and garden plants, amounting to USD 2.3 billion. As cultivation and the number of producers continue to grow, there is a corresponding increase in the use of pesticides.

In 2022, herbicides dominated the market with a majority share of 53.3%. This is due to the prevalence of weed infestation. Turf and ornamental crops are commonly affected by various weeds, including crabgrass, goosegrass, barnyardgrass, and foxtail. As a result, the use of herbicides has increased to combat these challenges and maintain the

health and appearance of the crops.

Insecticides accounted for 37.5% of the market share in 2022. Northern and southern masked chafers, Asiatic Garden beetles, weevils, billbugs, Japanese beetles, oriental beetles, European chafers, cutworms, and other chinch bugs are common insect pests affecting the turf and ornamental sector.

The crop protection chemicals market in the turf and ornamental sector is projected to grow during the forecast period with an estimated CAGR of 4.5%, driven by the increasing problems with fungal disease, insects, and weeds.

US Turf and Ornamental Protection Market Trends

Growing adoption of turf & ornamental crops in various applications, extending cultivation area under these crops may drive the market

Neonicotinoids are the most commonly used in turf care as a preventive material for the control of white grubs. Turf and ornamental crops comprise about 4% of neonicotinoid usage in the United States. There is a rising demand for well-maintained turf and ornamental landscapes, such as in parks, golf courses, gardens, and public spaces, leading to higher pesticide usage to control pests and maintain the desired appearance.

The area under the turf and ornamental increased by 649.8 thousand hectares between 2017 and 2022 due to the rising demand for flowers in the United States. The increase in cultivation area and meeting the quality requirements led to the increase in the consumption of pesticides during the same period.

Homeowners, landscapers, and property managers are more aware of the importance of pest management to maintain the value and appeal of their landscapes, leading to higher adoption of pesticide products. Golf courses, sports fields, and public parks often require pest management to maintain their quality, contributing to the consumption of pesticides in the turf segment.

Additionally, an increase in pest pressures affecting turfs and ornamental areas, such as weeds, insects, or diseases, could lead to an increase in the consumption of pesticides for effective control during the coming years. As urban areas expand, green spaces become more concentrated, creating conducive environments for pests to

thrive, which could lead to a higher demand for pest management solutions.

Changing climate patterns can influence pest populations, which may drive the consumption of pesticides in the coming years.

Effectiveness in controlling various insects such as aphids, beetles, spotted ball worms, pink ball worms, early spot borers, hairy caterpillars, and limited availability in the country is increasing the price of it

In 2022, cypermethrin was priced at USD 21.2 thousand per metric ton. It has been widely adopted in turf & ornamental crops for its effectiveness in controlling various types of insects, including aphids, beetles, spotted ball worms, pink ball worms, early spot borers, and hairy caterpillars. Its effectiveness has made it popular for farmers seeking to protect their crops from pests and ensure a successful harvest.

Atrazine, a systemic herbicide belonging to the chlorinated triazine group, is utilized for targeted control of annual grasses and broadleaf weeds before their emergence. Pesticide formulations containing atrazine are approved for application on various turf & ornamental such as sports turf, golf course turf, and commercial and residential lawns, in addition to agricultural applications like corn, sweet corn, sorghum, sugarcane, wheat, macadamia nuts, and guava. Atrazine was priced at USD 13.8 thousand per metric ton in 2022.

Malathion is used to control a wide range of pests, including aphids, fleas, and other sucking pests on several valuable ornamental crops. Crops extensively grown in the United States and frequently use malathion are chrysanthemums, evergreens, roses, camellias, and azaleas. Malathion was priced at USD 12.6 thousand per metric ton in 2022.

Mancozeb is a broad-spectrum contact fungicide labeled for outdoor and greenhouse crops in the United States. It protects against a wide spectrum of fungal diseases, including leaf, stem, stripe rusts, botrytis blight, leaf spot, and Cercospora blight. It serves as a seed treatment for crops such as potatoes, corn, sorghum, tomatoes, and cereal grains. In 2022, its market value reached USD 7.8 thousand per metric ton.

US Turf and Ornamental Protection Industry Overview

The US Turf and Ornamental Protection Market is moderately consolidated, with the top five companies occupying 44.37%. The major players in this market are BASF SE, Corteva Agriscience, Environmental Science US LLC (Envu), FMC Corporation and Nufarm Ltd (sorted alphabetically).

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