

MCPP-P (CAS No. 66423-09-4) Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application

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Abstracts

MCPP-P (CAS No. 66423-09-4) Market Summary Introduction

MCPP-P (CAS No. 66423-09-4), also known as mecoprop-P, is a selective systemic herbicide widely utilized in agriculture and turf management, valued for its efficacy in controlling broadleaf weeds while leaving grasses largely unaffected. As a phenoxy herbicide, MCPP-P is absorbed through leaves and translocated within plants, disrupting growth processes in susceptible species. Its versatility, cost-effectiveness, and compatibility with various formulations distinguish it within the agrochemical sector, catering to both large-scale farming and specialized turf applications. The market is shaped by regulatory frameworks and evolving agricultural practices, with a focus on sustainable weed management solutions.

Regulatory developments play a significant role in its market dynamics. The Commission Implementing Regulation (EU) 2023/114 extended the approval period for active substances including mecoprop-P until January 31, 2024, while the Commission Implementing Regulation (EU) 2024/324 further extended MCPP-P's approval to May 15, 2025, ensuring its continued use in the European Union. Additionally, in 2024, China's 12th batch of proposed pesticide registrations included technical-grade MCPP-P from Ningxia Gerui Fine Chemical Co., Ltd. (for export to Panama) and Jiangxi Tianyu Chemical Co., Ltd. (for export to Cambodia), highlighting its relevance in international markets. Available as a formulated product, MCPP-P serves key applications in cereals and turf grass, where its precision and reliability are prized. The industry is trending toward integrated weed management, reduced environmental impact, and formulations that align with stringent safety standards, reflecting broader shifts in global agriculture.

Market Size and Growth Forecast



The global formulated MCPP-P market is anticipated to reach USD 350 million to USD 400 million in 2025. Looking ahead, it is expected to grow at a compound annual growth rate (CAGR) of 4% to 5.5% from 2025 to 2030, potentially expanding to USD 450 million to USD 525 million by the end of the decade. This growth is driven by steady demand in cereal production, turf maintenance, and ongoing regulatory support in key regions.

Regional Analysis

North America: Projected to grow at 3.5% to 5%, the U.S. dominates, fueled by extensive cereal farming and golf course maintenance. Trends favor sustainable herbicides, with Canada contributing through its focus on integrated pest management in agriculture.

Europe: Expected at 3% to 4.5%, Germany, France, and the UK lead, supported by extended EU approvals. The market emphasizes low-impact formulations, aligning with strict environmental regulations and organic farming growth.

Asia Pacific: Forecasted at 5% to 6.5%, China and India anchor demand, driven by cereal production and export-oriented manufacturing. Trends lean toward cost-effective herbicides, with Japan focusing on turf applications for sports facilities.

Middle East and Africa (MEA): Anticipated at 2.5% to 4%, South Africa and Turkey drive growth with cereal and landscaping needs. The market prioritizes affordable solutions, though adoption varies with agricultural investment.

South America: Expected at 4% to 5.5%, Brazil leads with its vast cereal fields. Trends focus on scalable weed control, with potential tied to export-driven agriculture.

Application Analysis

Cereals: Projected at 4.5% to 6%, this segment relies on MCPP-P to manage weeds in wheat, barley, and oats. Its selectivity and efficacy drive demand, with trends toward tank-mix formulations for broader weed control.

Turf Grass: Expected at 3.5% to 5%, MCPP-P maintains lawns, golf courses, and sports fields. Growth is steady, with trends favoring eco-friendly options and precision application to meet aesthetic and regulatory standards.

Key Market Players

Nufarm: A global agrochemical leader, Nufarm offers MCPP-P formulations tailored for cereals and turf, emphasizing reliability and innovation.

Loveland Products: A key player, Loveland provides MCPP-P solutions for agricultural and turf markets, focusing on performance and accessibility.

BASF: A chemical giant, BASF delivers MCPP-P products with a focus on sustainable weed management across diverse applications.



Bayer: Renowned for crop protection, Bayer crafts MCPP-P formulations for precision agriculture and turf care.

Corteva: A major agriscience firm, Corteva supplies MCPP-P for cereal farmers, blending efficacy with environmental stewardship.

FMC: A leader in pest control, FMC offers MCPP-P solutions for both cereals and turf, prioritizing advanced formulations.

Syngenta: A global innovator, Syngenta provides MCPP-P products for weed control, supporting large-scale farming and landscaping.

Adama: A versatile supplier, Adama delivers cost-effective MCPP-P options for global agricultural markets.

PBI Gordon: Specializing in turf and ornamental care, PBI Gordon offers MCPP-P for high-quality lawn maintenance.

Porter's Five Forces Analysis

Threat of New Entrants: Moderate, as the market requires significant expertise in herbicide formulation and regulatory compliance. Established brands dominate, though niche players with innovative solutions could emerge.

Threat of Substitutes: High, with alternative herbicides like glyphosate and 2,4-D competing. MCPP-P's selectivity and regulatory approval sustain its position, though substitution pressures persist.

Bargaining Power of Buyers: Medium to high, as large agricultural firms and turf managers demand cost-effective, compliant products. Specialized applications slightly offset buyer leverage.

Bargaining Power of Suppliers: Moderate, with dependence on raw chemical inputs giving suppliers influence, mitigated by diversified sourcing among major players. Competitive Rivalry: Intense, driven by innovation in formulations, pricing competition, and differentiation through sustainability and efficacy, heightening rivalry among global and regional firms.

Impact of Tariff Conflicts on Supply Chain Localization

Tariff conflicts have catalyzed a significant shift in the MCPP-P supply chain, prompting manufacturers to localize production to evade rising import duties and ensure steady access to raw materials like phenoxy intermediates. This strategic realignment reduces reliance on volatile international trade routes, fostering regional hubs in North America, Europe, and Asia Pacific. Companies are investing heavily in local facilities, positioning themselves closer to key markets such as the U.S. cereal belt and China's export zones, slashing transportation costs and enhancing delivery speed. This localization bolsters operational agility, enabling firms to adapt swiftly to regional regulations and customer demands while buffering against trade disruptions. However, the transition



demands substantial capital for new plants, workforce training, and compliance with diverse local standards, straining resources in the short term. Over the long haul, these localized supply chains promise enhanced resilience, empowering manufacturers to navigate geopolitical uncertainties, stabilize production, and strengthen their competitive foothold in a fragmented global trade landscape.

Market Opportunities and Challenges

Opportunities

Extended regulatory approvals, such as in the EU until May 2025, provide a stable window for MCPP-P market growth, particularly in cereals and turf. Rising cereal production in Asia and South America offers vast potential, driven by food security needs and export markets. Innovations in eco-friendly formulations align with sustainability trends, unlocking demand in environmentally conscious regions like Europe. Emerging markets, such as India and Africa, present growth avenues with affordable weed control solutions for expanding agriculture. Regulatory support for selective herbicides encourages adoption, spurring investment in advanced MCPP-P applications.

Challenges

Raw material price volatility squeezes margins and disrupts cost predictability, challenging smaller producers. Competition from broader-spectrum herbicides like glyphosate requires continuous differentiation through selectivity and safety. Stringent environmental regulations, especially in Europe, elevate compliance costs, slowing innovation and market entry. Supply chain risks, intensified by trade tensions and chemical shortages, threaten production continuity, demanding robust sourcing strategies. Shifting farmer preferences toward integrated weed management could reduce reliance on single-active herbicides like MCPP-P, pressuring market share.



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