

# **Agricultural Disinfectants Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2018-2028 Segmented By Type (Quaternary Ammonium Chloride Salts, Hydrogen Dioxide and Pyeroxyacetic Acid, Hypochlorites and Halogens, Other), By Application (Surface, Aerial, Water Sanitizing), By Form (Liquid, Powder), By Region, Competition**

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## **Abstracts**

Global Agricultural Disinfectants Market has valued at USD 2.09 billion in 2022 and is anticipated to project steady growth in the forecast period with a CAGR of 4.38% through 2028. The Global Agricultural Disinfectants Market is a dynamic and evolving sector that plays a crucial role in ensuring the health, productivity, and sustainability of agricultural practices worldwide. This market encompasses a wide range of disinfectant products and solutions designed to control and prevent the spread of diseases and pathogens in both crop and livestock farming.

### **Key Market Drivers**

#### **Increasing Awareness of Biosecurity Measures**

The Increasing Awareness of Biosecurity Measures serves as a pivotal driver propelling the growth of the Global Agricultural Disinfectants Market. This awareness is characterized by a heightened understanding among farmers, agricultural stakeholders, and industry participants about the critical role of biosecurity measures in maintaining the health and productivity of crops and livestock. Agricultural operations are vulnerable

to the outbreak of diseases and pathogens that can have severe economic consequences. The awareness of biosecurity measures underscores the importance of proactive steps to prevent and control the spread of diseases within farming environments. Agricultural disinfectants play a central role in this preventive approach, ensuring that farms maintain a hygienic and disease-free atmosphere.

Farmers are increasingly cognizant of the substantial economic impact of disease outbreaks on crop yields and livestock production. Diseases can lead to reduced crop quality, lower yields, increased mortality rates in livestock, and additional costs associated with disease management and treatment. This heightened awareness drives the adoption of agricultural disinfectants as a strategic investment to mitigate economic losses and safeguard the financial viability of farming operations. In an interconnected global market, adherence to biosecurity measures is not only a matter of local concern but also a necessity for participating in international trade. Many countries have stringent biosecurity regulations to ensure the safety of agricultural products. The awareness of these global standards encourages farmers to incorporate disinfection practices into their operations to meet compliance requirements, facilitating access to wider markets and boosting exports.

The increasing awareness of biosecurity measures aligns with advancements in technology, leading to the development of more effective and targeted disinfection solutions. Farmers are now more informed about innovative products and technologies that offer efficient disease control while minimizing environmental impact. This awareness drives the demand for advanced agricultural disinfectants, fostering innovation within the market. Agricultural extension services and educational initiatives play a crucial role in disseminating information about best practices in biosecurity. Governments, agricultural organizations, and industry players often conduct awareness campaigns, training sessions, and workshops to educate farmers about the benefits of biosecurity measures and the proper use of disinfectants. This educational outreach contributes to an informed and proactive farming community.

### Rising Global Population and Food Demand

The Rising Global Population and Food Demand represent a significant driver behind the growth of the Global Agricultural Disinfectants Market. This driver is intricately linked to the increasing need for efficient and sustainable agricultural practices to meet the growing demand for food worldwide.

The world's population is steadily increasing, leading to a surge in the demand for food.

This demographic trend exerts substantial pressure on the agricultural sector to enhance productivity and output. Agricultural disinfectants play a crucial role in maintaining the health and well-being of crops and livestock, ensuring optimal yields and meeting the escalating demand for food products. To meet the rising demand for food, there is a global trend towards the intensification of agricultural practices. This involves the cultivation of larger areas of land and the implementation of more intensive livestock farming methods. As agricultural operations become more concentrated, the risk of disease outbreaks increases. Agricultural disinfectants become indispensable in such intensified systems to prevent and control the spread of diseases among crops and livestock. With the increasing awareness and concern about food safety, consumers and regulatory authorities alike are placing greater emphasis on the quality of agricultural products. Agricultural disinfectants contribute to the assurance of food safety by preventing the contamination of crops and livestock with harmful pathogens. As a result, the use of disinfectants aligns with the broader goals of ensuring high-quality, safe, and wholesome food for the growing global population.

Meeting the food demands of a rising population requires a coordinated effort at the global level. Countries with surplus agricultural production often engage in international trade to address the food needs of regions facing shortages. To participate in global trade, adherence to quality and safety standards, including the use of agricultural disinfectants, becomes imperative. This, in turn, stimulates the demand for disinfectant products in the agricultural sector. The need to sustainably increase agricultural productivity has led to the adoption of advanced technologies. Agricultural disinfectants, as part of an integrated pest management strategy, contribute to sustainable agriculture by reducing the reliance on chemical pesticides and promoting a healthier agroecosystem. This alignment with sustainable practices further enhances the appeal of disinfectants in the context of rising global food demand. The increasing demand for food has spurred investments in agricultural innovation, including research and development of new and improved disinfectant products. Innovations in formulation, application methods, and the development of environmentally friendly disinfectants are driven by the need to address the challenges posed by a growing global population and the associated increase in food demand.

### Stringent Regulations on Food Safety and Animal Health

Stringent Regulations on Food Safety and Animal Health constitute a pivotal driver fueling the growth of the Global Agricultural Disinfectants Market. This driver reflects the increasing emphasis by regulatory bodies and governments worldwide on implementing measures to ensure the safety of agricultural products and the health of livestock

Stringent regulations are crafted with the primary objective of safeguarding consumer health and well-being. Contamination of agricultural products with pathogens or residues of harmful substances poses a direct risk to consumers. Agricultural disinfectants play a crucial role in preventing the transmission of diseases from animals to humans and in mitigating the presence of harmful microorganisms in crops, contributing to overall food safety. Regulatory frameworks often require the implementation of biosecurity measures on farms to prevent and control the outbreak of diseases. Agricultural disinfectants are integral to these measures, helping farmers maintain hygienic conditions and reduce the risk of disease transmission among livestock and crops. Compliance with these regulations encourages the widespread adoption of disinfectants in agricultural practices. In an era of globalized trade, adherence to stringent food safety and animal health regulations is critical for participating in international markets. Exporting countries must meet the standards set by importing nations to ensure the quality and safety of agricultural products. The use of agricultural disinfectants becomes a strategic imperative for farmers and agricultural businesses aiming to comply with international trade regulations, thereby boosting the demand for disinfectant products.

Stringent regulations often include provisions for traceability and transparency in the agricultural supply chain. This necessitates rigorous record-keeping and documentation of farming practices, including the use of disinfectants. Farmers may be required to demonstrate adherence to specific protocols, and the use of approved disinfectants forms a crucial component of these compliance measures. Regulations addressing animal health and welfare also contribute to the demand for agricultural disinfectants. As part of disease prevention and control, disinfectants are employed to create environments that promote the well-being of livestock. Compliance with animal welfare standards, which often include biosecurity measures, mandates the use of disinfectants to maintain sanitary conditions in livestock housing and farming facilities.

### Increasing Intensity of Livestock Farming and Commercial Agriculture

The Increasing Intensity of Livestock Farming and Commercial Agriculture serves as a significant driver propelling the growth of the Global Agricultural Disinfectants Market. This driver is closely tied to the trends of larger-scale and more concentrated agricultural operations.

The intensification of livestock farming involves raising a larger number of animals in a confined space. This concentration increases the risk of disease transmission among

animals, making disease prevention a critical aspect of modern livestock management. Agricultural disinfectants are essential tools in maintaining biosecurity on these farms by controlling the spread of pathogens, preventing disease outbreaks, and ensuring the overall health of the livestock. As commercial livestock farming operations expand in scale, the implementation of biosecurity measures becomes imperative. Biosecurity involves practices that minimize the risk of diseases entering or spreading within a farm. Agricultural disinfectants play a crucial role in biosecurity protocols, contributing to the prevention of diseases such as avian influenza, foot-and-mouth disease, and other contagious illnesses that can have devastating effects on livestock populations. In commercial agriculture, where large expanses of land are cultivated, the risk of disease outbreaks among crops also intensifies. Agricultural disinfectants are used to treat equipment, machinery, and facilities, preventing the spread of soil-borne pathogens, fungi, and other harmful microorganisms. This is particularly crucial in monoculture systems where a single crop dominates, creating conditions conducive to the rapid spread of specific diseases.

The intensification of agricultural practices is driven by the need to enhance efficiency and meet the demands of a growing population. Large-scale operations allow for economies of scale, but they also necessitate robust disease management strategies. Agricultural disinfectants contribute to the efficiency of farming operations by helping prevent disease-related losses, ensuring a consistent supply of agricultural products, and maintaining the overall health and productivity of livestock and crops. The trend towards vertical integration in agriculture, where a single entity controls multiple stages of the production chain, has become more prevalent. Integrated farming systems often involve both crop cultivation and livestock rearing. In such systems, the use of agricultural disinfectants becomes integral to managing the health risks associated with diverse farming activities under one umbrella. As commercial agriculture and livestock farming intensify, regulatory scrutiny also increases. Compliance with regulations and adherence to good agricultural practices are essential for ensuring market access and consumer trust. Agricultural disinfectants, as part of biosecurity measures, contribute to compliance with these standards, driving their adoption in intensified farming systems.

## Key Market Challenges

### Regulatory Complexity and Approval Processes

One significant challenge for the agricultural disinfectants market is the intricate regulatory landscape governing the approval, sale, and use of these products. Different countries and regions have varying regulations regarding the types of disinfectants that

can be used, permissible concentrations, and application methods. Obtaining regulatory approvals can be a time-consuming and resource-intensive process for manufacturers. Additionally, evolving regulatory standards and the need for constant compliance updates can create hurdles for market participants, potentially delaying product launches and market entry.

### Environmental Concerns and Sustainability Pressures

The agricultural sector is facing increasing scrutiny regarding its environmental impact, and agricultural disinfectants are not exempt from these concerns. Some disinfectants may contain chemicals that pose environmental risks, such as soil and water contamination. As sustainability becomes a central focus in agriculture, there is a growing demand for eco-friendly and biodegradable disinfectant solutions. Market players face the challenge of developing products that effectively control diseases while meeting stringent environmental standards. Striking the right balance between efficacy and environmental sustainability poses a significant challenge for the growth of the agricultural disinfectants market.

### Resistance Development in Pathogens

Prolonged and widespread use of certain disinfectants can contribute to the development of resistance in pathogens, rendering the disinfectants less effective over time. This challenge is particularly relevant in livestock farming, where the frequent use of disinfectants may lead to the emergence of resistant strains of bacteria or viruses. The evolution of resistant pathogens poses a dual challenge for the industry: first, in maintaining the effectiveness of existing disinfectants, and second, in developing new formulations that can combat emerging resistant strains. This challenge necessitates ongoing research and innovation to stay ahead of evolving resistance patterns.

### Key Market Trends

#### Rising Demand for Sustainable and Eco-Friendly Solutions

A significant trend in the agricultural disinfectants market is the increasing demand for sustainable and environmentally friendly solutions. As awareness of the environmental impact of agricultural practices grows, farmers and agribusinesses are seeking disinfectant products that are biodegradable, have lower toxicity levels, and do not contribute to soil or water pollution. Manufacturers are responding to this trend by developing innovative formulations that balance efficacy with eco-friendliness. Bio-



based disinfectants, such as those derived from natural sources, are gaining traction as sustainable alternatives in response to this market trend.

### Technological Advancements and Precision Farming Integration

Technological advancements are playing a pivotal role in the evolution of the agricultural disinfectants market. Integration with precision farming practices, which involve the use of technology to optimize inputs and maximize efficiency, is a notable trend. Automated disinfection systems, sensor-based monitoring, and data-driven decision-making are becoming more prevalent in modern agriculture. This trend not only enhances the precision and effectiveness of disinfection processes but also aligns with broader efforts to digitize and modernize farming practices.

### Focus on Multi-Functional and Specialty Disinfectants

The market is witnessing a shift towards the development and adoption of multi-functional and specialty disinfectants. These products offer a range of benefits beyond traditional pathogen control, such as promoting soil health, enhancing crop yield, and supporting overall plant or animal well-being. Specialty disinfectants may have additional properties, such as nutrient enrichment or stress tolerance improvement. This trend reflects a growing recognition that agricultural disinfectants can contribute to holistic farm management, addressing multiple challenges simultaneously.

### Segmental Insights

#### Type Insights

Based on the category of Type, the Quaternary Ammonium Chloride Salts segment emerged as the dominant player in the global market for Agricultural Disinfectants in 2022. The dominance of the Quaternary Ammonium Chloride Salts segment in the Global Agricultural Disinfectants Market can be attributed to several factors that highlight its efficacy, versatility, and widespread adoption in agricultural disinfection practices.

Quaternary Ammonium Chloride Salts, commonly known as QACs, are highly effective against a broad spectrum of pathogens, including bacteria, viruses, and fungi. This broad-spectrum activity is a crucial attribute in agricultural settings where diverse microorganisms can pose threats to crops and livestock. Farmers and agricultural professionals favor QACs for their ability to provide comprehensive protection against

various infectious agents, contributing to their dominance in the market.

Additionally, Quaternary Ammonium Chloride Salts exhibit versatility in terms of application. They can be used for disinfecting various surfaces, equipment, and facilities in both crop and livestock farming. The adaptability of QACs to different application methods, such as spray, dip, or fogging, makes them suitable for a wide range of agricultural environments. This versatility enhances their attractiveness to farmers and agricultural businesses seeking efficient and flexible disinfection solutions. These factors are expected to drive the growth of this segment.

### Application Insight

Based on the category of Application, the Surface segment emerged as the dominant player in the global market for Agricultural Disinfectants in 2022. Surface disinfection encompasses a diverse range of applications in agriculture. It involves the cleaning and disinfection of various surfaces, including equipment, tools, machinery, storage facilities, animal housing, and transportation vehicles. The versatility of surface disinfection makes it a critical aspect of overall farm hygiene, influencing the decision of farmers and agricultural professionals to prioritize this category. Surface disinfection is crucial for preventing the spread of pathogens within agricultural environments. Contaminated surfaces can serve as reservoirs for disease-causing microorganisms, leading to the transmission of infections among crops and livestock. Farmers recognize the importance of maintaining clean and disinfected surfaces to break the cycle of disease transmission and ensure the overall health of plants and animals. In livestock farming, the Surface application of disinfectants is a key component of biosecurity measures. Livestock facilities, including barns, pens, and equipment, are potential hotspots for disease transmission. Regular surface disinfection helps create a hygienic environment, minimizing the risk of infectious diseases. The emphasis on biosecurity in modern livestock management contributes significantly to the dominance of the Surface segment in the agricultural disinfectants market. Regulatory standards often mandate the use of disinfectants on various surfaces in agricultural settings. Compliance with these standards is essential for farmers to meet regulatory requirements and ensure the safety and quality of agricultural products. The Surface segment, which includes disinfection of equipment and facilities, aligns closely with these regulatory expectations, driving its dominance in the market.

### Form Insights

The Liquid segment is projected to experience rapid growth during the forecast period.



Physicians, dieticians, and other healthcare professionals are increasingly recommending Agricultural Disinfectants to their patients to enhance health and improve quality of life. Consequently, prescription medicines are predominantly available in pharmacies, which is expected to contribute to the growth of this segment. Moreover, the hypermarkets/supermarkets segment is anticipated to present favorable growth opportunities in the forecast period due to its wide acceptance among end-users. Factors such as organized product display panels, consumers' willingness to pay premium prices for specific products, and the strong relationship between sales executives and buyers facilitate a better understanding of consumer preferences for products and brands. These factors collectively contribute to the growth of this segment.

## Regional Insights

Asia Pacific emerged as the dominant player in the global Agricultural Disinfectants market in 2022, holding the largest market share in terms of value. The Asia-Pacific region is home to a significant and rapidly growing population. The increasing demand for food to meet the dietary needs of this population is a primary driver for the use of agricultural disinfectants. As the demand for food rises, farmers are adopting advanced agricultural practices to ensure high yields and food safety. Many countries in the Asia-Pacific region are experiencing a shift toward more industrialized and commercialized farming practices. This includes larger-scale operations, increased use of technology, and a focus on efficiency. In such settings, the importance of disease prevention through the use of agricultural disinfectants becomes paramount. Governments in several Asia-Pacific countries have recognized the importance of the agricultural sector and are implementing initiatives to support modernization and technology adoption in farming. Investments in infrastructure, research, and extension services contribute to the growth of the agricultural disinfectants market. There is an increasing awareness of biosecurity measures among farmers in the Asia-Pacific region. Biosecurity is seen as crucial for preventing the spread of diseases in both livestock and crops. As awareness grows, the demand for effective disinfection practices, including the use of agricultural disinfectants, is on the rise. The region is experiencing a shift toward more intensive livestock farming practices. Concentrated animal feeding operations (CAFOs) are becoming more common, increasing the risk of disease transmission. This trend fuels the demand for disinfectants to maintain biosecurity in such settings.

The Europe market is poised to be the fastest-growing market, offering lucrative growth opportunities for Agricultural Disinfectants players during the forecast period. Factors such as Europe places a strong emphasis on food safety and has stringent regulatory standards. The need to comply with these standards drives the demand for effective

agricultural disinfectants. As regulations evolve, farmers are likely to adopt advanced disinfection practices, contributing to market growth. Europe has been a leader in adopting sustainable and environmentally friendly agricultural practices. There is a growing demand for disinfectants that are not only effective but also environmentally sustainable. Manufacturers offering eco-friendly solutions may find increased acceptance in the European market. Europe has been at the forefront of adopting advanced agricultural technologies, including precision farming practices. The integration of technology into farming operations creates opportunities for the use of innovative disinfection solutions. Automated and precision application methods may see increased adoption in the European market. European consumers and regulators place a high value on animal welfare. This focus extends to farming practices, including disease prevention measures. The use of disinfectants to maintain a healthy environment for livestock aligns with European priorities, supporting market growth.

### Key Market Players

Lanxess AG

Neogen Corporation

Nufarm Limited

Stepan Company

Zoetis Services LLC

Ceva Sante Animale Group

Corteva Agri Science Inc.

Thymox Technology

Entaco NV

Bayer Cropscience AG

### Report Scope:

In this report, the Global Agricultural Disinfectants Market has been segmented into the

following categories, in addition to the industry trends which have also been detailed below:

Agricultural Disinfectants Market, By Type:

Quaternary Ammonium Chloride Salts

Hydrogen Dioxide and Pyeroxyacetic Acid

Hypochlorites and Halogens

Other

Agricultural Disinfectants Market, By Application:

Surface

Aerial

Water Sanitizing

Agricultural Disinfectants Market, By Form:

Liquid

Powder

Agricultural Disinfectants Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Agricultural Disinfectants Market.

### Available Customizations:

Global Agricultural Disinfectants market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

Detailed analysis and profiling of additional market players (up to five).

## Contents

**1. LANXESS AG**

**2. NEOGEN CORPORATION**

**3. NUFARM LIMITED**

**4. STEPAN COMPANY**

**5. ZOETIS SERVICES LLC**

**6. CEVA SANTE ANIMALE GROUP**

**7. CORTEVA AGRI SCIENCE INC.**

**8. THYMOX TECHNOLOGY**

**9. ENTACO NV**

**10. BAYER CROPSCIENCE AG**



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