

Agricultural Fumigants Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Product Type (Methyl Bromide, Phosphine, Chloropicrin, Metam Sodium, 1, 3-Dichloropropene and Others), By Crop Type (Cereals & Grains, Oilseeds & Pulses, Fruits & Vegetables and Others), By Form (Solid, Liquid and Gaseous), By Function (Nematicides, Insecticides, Fungicides, Herbicides), By Application (Soil and Warehouse), By Pest Control Method (Tarpaulin Fumigation, Non-Tarpaulin Fumigation by Injection, Structural Fumigation, Vacuum Chamber Fumigation and Others), By Region and Competition

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Abstracts

Global Agricultural Fumigants Market was valued at USD 2.45 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 4.81% through 2028. Agricultural fumigants are highly volatile and toxic substances that are utilized in the control of disease-causing fungi, nematodes, and weeds. These compounds are meticulously injected two feet into the soil and subsequently covered with an impermeable film before the planting of crops or trees takes place. Due to their classification as restricted materials, they pose significant health and safety risks to exposed agricultural workers and carry potential environmental hazards resulting from misapplication or accidents. As a result, only trained or certified applicators are authorized to apply these fumigants. Some of the commonly employed agricultural

fumigants include methyl bromide, dichloropropane, propylene oxide, dibromochloropropane, organophosphate insecticides, and chloropicrin. The precise and controlled use of these substances is paramount in ensuring the effective and safe management of agricultural practices.

Key Market Drivers

Increase in Agricultural Production

The global demand for agricultural fumigants is projected to experience significant growth due to the anticipated increase in agricultural production. As the world's population continues to rise, there is a consequent surge in the demand for food products, driving the necessity for heightened agricultural production. Fumigants play a crucial role in this process, as they help control pests and diseases that could potentially devastate crop yields. They ensure healthier crops and higher productivity, thereby ensuring the food security of the burgeoning global population. Moreover, the expansion of trade in agrarian commodities necessitates that products meet stringent quality standards. This further impels the need for effective fumigants to maintain crop quality during storage and transportation. Concurrently, technological advancements are facilitating the development of more efficient and environment-friendly fumigants, further boosting their demand in the global market. Hence, the increase in agricultural production is intrinsically linked to an escalating demand for agricultural fumigants globally.

Advancements in Farming Techniques & Equipment

Advancements in farming techniques and equipment are projected to stimulate the global demand for agricultural fumigants. The drive towards maximizing crop yields and food production has led to the implementation of sophisticated technologies and farming methods. Modern farming methods, such as precision agriculture, leverage advanced tools and equipment to apply targeted treatments—including fumigation—to fields, improving crop health while minimizing wastage. Precision fumigation significantly enhances the efficacy of pest control, reducing the quantity of fumigants required and curtailing the harmful environmental impact. In turn, this has increased the global reliance on agricultural fumigants. Furthermore, the advent of innovative farming equipment has simplified the process of fumigation, increasing its adoption among farmers worldwide. Automated fumigation systems, for instance, offer efficient and rapid application of fumigants, saving time and labor costs. Coinciding with the ongoing global population surge, the need for food security is paramount. This escalates the demand

for advanced and efficient farming techniques, propelling the use of agricultural fumigants. Therefore, modern farming techniques and equipment advancements are expected to significantly bolster the global agricultural fumigants market.

Rise Cases of Pest-Resistant Species

The escalating prevalence of pest-resistant species, a consequence of overuse and misuse of conventional pesticides, is anticipated to propel the global demand for agricultural fumigants. These chemical solutions have been recognized for their robust efficacy in managing resistive pests, diseases, and pathogens that hamper crop yield, thereby leading to significant economic losses. The increasing vulnerability of crops to resistive pests is inducing farmers to adopt fumigants, which are potent enough to permeate soil or enclosed space, ensuring the elimination of pests in all life stages. Furthermore, the progressive adoption of integrated pest management strategies, which integrate the use of fumigants with biological and mechanical pest control methods, is another contributing factor to the growing demand. Coupled with the pressure to meet the food demands of an ever-growing global population, the need for high crop yield and quality has never been more crucial. Hence, agricultural fumigants, offering a comprehensive pest management solution, are expected to witness a surge in demand, globally.

Innovation in Fumigant Products

The global agricultural sector is poised to experience increased demand for fumigants as a result of a surge in innovative fumigant products. These innovative solutions, designed with enhanced efficacy and safety characteristics, have the potential to revolutionize pest control and soil disinfestation methodologies. By providing increased yield and more efficient pest management, these fumigants stand as compelling tools for farmers around the globe. One of the key factors driving this innovation is the mounting demand for high-quality agricultural products. As population growth and changing dietary habits escalate the need for increased crop productivity, effective fumigants become critical to meeting these requirements. Additionally, innovations are significantly reducing the environmental impact of these products. Modern fumigants are being developed to minimize harmful emissions and residue, contributing to sustainable farming practices. Notably, regulatory bodies are encouraging the adoption of such eco-friendly alternatives, further fueling their demand. Moreover, advances in application technology, like precision fumigation, are making these products more user-friendly and cost-effective. In summary, the interplay between innovative product design, escalating global food demand, and sustainability trends is expected to propel the demand for

agricultural fumigants worldwide.

Key Market Challenges

Stringent Regulatory Procedures & Policies

Stringent regulatory procedures and policies around the globe are anticipated to hinder the demand for agricultural fumigants. Legislations pertaining to the use of these substances are becoming increasingly tight, driven by mounting concerns related to public health and environmental safety. Agricultural fumigants, while effective for crop protection, can pose serious environmental and health hazards when not handled properly. Many countries are now implementing policies that restrict their application, hence impacting their global demand. For instance, regulations such as the Pesticide Management Regulation in China and the Federal Insecticide, Fungicide, and Rodenticide Act (FIFRA) in the United States enforce strict application guidelines and impose penalties for non-compliance. Moreover, governmental agencies across the world, such as the European Food Safety Authority (EFSA) and the U.S. Environmental Protection Agency (EPA), mandate rigorous testing and approval procedures for fumigants before they can be commercially used. These additional hurdles in the process of gaining regulatory approval are expected to curb global agricultural fumigant use, thereby decreasing their demand. The trend is to shift towards more sustainable and less toxic alternatives, further diminishing the reliance on traditional agricultural fumigants.

High Cost of Fumigants

The agricultural sector is facing a significant challenge due to the high cost of fumigants, which are essential for the control of soil-borne pests and diseases. These fumigants play a crucial role in maintaining the quality and yield of crops. However, their escalating cost is expected to dampen the global demand. The high price tag attached to these chemicals is primarily due to the complexities involved in their production and regulatory requirements. Additionally, the growing emphasis on environmental sustainability and the consequent stricter regulations are driving up the costs further, as manufacturers are compelled to invest heavily in R&D to develop eco-friendly alternatives. Furthermore, the high cost restricts small and medium scale farmers, particularly in developing nations, from accessing these fumigants. This economic barrier imposes a substantial threat to farm productivity and food security in these regions. Thus, the combination of these factors will likely contribute to a decrease in the global demand for agricultural fumigants. In response, stakeholders in the agricultural sector are exploring

more affordable and sustainable pest management strategies, such as crop rotation, bio fumigation, and the use of resistant crop varieties.

Key Market Trends

Expansion of Farmlands into Pest-Prone Areas

The global demand for agricultural fumigants is poised for substantial growth, primarily driven by the expansion of farmlands into pest-prone areas. As the human population continues to rise, the need for increased agricultural productivity necessitates the cultivation of more land. Unfortunately, many of these new agricultural areas are located in regions with high pest populations. The use of fumigants becomes crucial in these circumstances to ensure the protection of crops and maintain optimum yield levels. Not only do these chemicals safeguard crops from pests, but they also contribute to soil sterilization, thereby enhancing its fertility. Therefore, as the global agricultural landscape expands into pest-ridden areas, the reliance on fumigants is expected to surge. Additionally, advancements in fumigant technology and an increased understanding of their application and benefits further stimulate this demand. Farmers around the world recognize the importance of these chemicals in not only protecting their produce but also in boosting overall agricultural output. Hence, the forecast for the global agricultural fumigants market looks promising, driven by the continuous expansion of farmlands into areas where pests proliferate.

Technological Advancements in Fumigation Methods

Technological advancements in fumigation methods are expected to fuel a surge in the global demand for agricultural fumigants. Agriculture, as an industry, is witnessing a digital revolution, reaping the benefits of technological innovation, particularly in pest control and crop protection. Contemporary fumigation techniques, infused with ground-breaking technology, are offering far more than disease and pest control. These advancements have made fumigation more efficient, cost-effective, and environmentally friendly, reducing the dependence on traditional, often harmful, chemical pesticides. Precision fumigation, for example, allows for accurate application targeted at high infestation zones, minimizing wastage and maximizing efficacy. Further, the advent of bio-fumigants, a sustainable alternative to chemical fumigants, is creating a paradigm shift in pest management practices. Bio-fumigants not only suppress pests but also enrich soil health, contributing to higher crop yields. Moreover, modern fumigation technology is aligning with the growing trend of smart farming, enabling remote operation and real-time monitoring of fumigation processes. This integration of

technology is projected to bolster agricultural productivity and food security, driving the global demand for advanced agricultural fumigants.

Segmental Insights

Product Type Insights

Based on the Product Type, Methyl Bromide continues to dominate the Global Agricultural Fumigants Market, thanks to its extensive usage in pest control across diverse agricultural sectors. Its effectiveness and relatively low cost contribute to this dominance. However, it is important to acknowledge that Methyl Bromide is being phased out due to environmental concerns. Despite this, it still holds the largest market share in the agricultural fumigants sector. Nevertheless, the market landscape is undergoing significant changes, and newer, more environmental friendly fumigants are expected to gain prominence in the coming years. The shift towards these alternatives is driven by the growing awareness of sustainability and the need to minimize environmental impact in agricultural practices. As regulations tighten and consumer preferences evolve, the demand for eco-friendly fumigants is likely to increase, opening up new opportunities for innovation and market growth in the agricultural fumigants industry.

Application Insights

Based on the Application, the soil application method is widely recognized as the more dominant approach when it comes to fumigation. This method holds a larger share in the market due to its extensive usage of fumigants for effective soil treatment against pests and weeds prior to sowing. By adopting this approach, farmers can ensure enhanced yield and productivity in their agricultural practices, leading to a more sustainable and profitable outcome.

However, it's worth noting that the warehouse fumigation method is steadily gaining traction in recent years. This is primarily driven by the increasing need for stored product protection as the demand for agricultural goods continues to rise. The warehouse method offers a targeted and controlled approach to fumigation, which plays a crucial role in safeguarding stored products from infestation and deterioration. By utilizing the warehouse fumigation method, farmers and distributors can implement comprehensive measures to protect their agricultural goods and commodities. This method provides an additional layer of protection and preservation, addressing the specific challenges associated with storing and preserving a wide range of agricultural

products. With its precise and focused application, the warehouse fumigation method contributes to the overall quality assurance and integrity of stored products, ensuring their long-term viability and marketability.

Regional Insights

North America holds the dominant position in the Global Agricultural Fumigants Market, due to its advanced farming practices, high adoption rate of modern agricultural techniques, and strong commitment to sustainable agriculture. The region's dedication to utilizing cutting-edge technology and innovative approaches has propelled it to the forefront of the market. With a significant number of agricultural fumigant companies operating in North America, it continues to solidify its leading status as a hub of agricultural innovation and excellence.

Key Market Players

BASF SE

ADAMA Ltd.

Dow Inc.

FMC Corporation

UPL Limited

Degesch GmbH

Nufarm Ltd.

American Vanguard Corporation

Nippon Chemical Industrial Co., Ltd.

Arkema SA

Report Scope:

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

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

Agricultural Fumigants Market, By Product Type:

Methyl Bromide

Phosphine

Chloropicrin

Metam Sodium

1, 3- Dichloropropene

Others

Agricultural Fumigants Market, By Crop Type:

Cereals & Grains

Oilseeds & Pulses

Fruits & Vegetables

Others

Agricultural Fumigants Market, By Form:

Solid

Liquid

Gaseous

Agricultural Fumigants Market, By Function:

Nematicides

Insecticides

Fungicides

Herbicides

Agricultural Fumigants Market, By Application:

Soil

Warehouse

Agricultural Fumigants Market, By Pest Control Method:

Tarpaulin Fumigation

Non-Tarpaulin Fumigation by Injection

Structural Fumigation

Vacuum Chamber Fumigation

Others

Agricultural Fumigants 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global

Agricultural Fumigants Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segm...

Agricultural Fumigants Market.

Available Customizations:

Global Agricultural Fumigants 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).

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