

# **Grain Protectants Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Control Method (Chemical, Physical, Biological), By Target Pest (Insects, Rodents, Others), By Grain Type (Corn, Wheat, Rice, Others), By Region and Competition, 2019-2029F**

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## **Abstracts**

Global Grain Protectants Market was valued at USD 678.49 Million in 2023 and anticipated to experience a steady growth in the forecast period at a CAGR of 5.47% through 2029. Grain protectants are substances or formulations applied to stored grains to safeguard them from damage caused by pests, insects, fungi, and other factors during storage. The primary purpose of using grain protectants is to preserve the quality and quantity of harvested grains, ensuring they remain suitable for consumption or other uses. These protective measures are especially crucial during the post-harvest period when stored grains are vulnerable to various threats. Traditional grain protectants often include chemical formulations such as insecticides, fungicides, and rodenticides. These substances are designed to control and eliminate pests, insects, and fungi that can damage stored grains. Derived from natural materials such as plants, bacteria, or fungi, biopesticides offer an environmentally friendly alternative. They target specific pests or pathogens and are often considered more sustainable compared to chemical protectants. Grain protectants control insect pests that can infest stored grains, including beetles, weevils, and moths. Fungal growth and mold can compromise the quality of grains. Fungicides in grain protectants help prevent the development of fungi and mold, reducing the risk of mycotoxin contamination.

With the growing global population, there is a continuous increase in agricultural production to meet the demand for food. This expansion in crop cultivation creates a

higher demand for grain protectants to safeguard harvested grains during storage. Climate change can influence the prevalence and behavior of pests. Shifts in temperature and precipitation patterns may lead to new pest challenges, making effective grain protectants crucial for adapting to these changes. Increasing regulatory scrutiny on food safety standards has led to a higher demand for grain protectants that meet these standards. Regulatory compliance is a key driver shaping the development and adoption of products in the market. The integration of advanced technologies in agriculture, such as precision farming and sensor-based monitoring systems, contributes to the demand for innovative grain protectants. These technologies enhance the efficiency and effectiveness of pest management practices. The development of resistance in pests to traditional grain protectants has created a need for new and innovative solutions. Products that address pest resistance and offer effective control are likely to drive market growth.

## Key Market Drivers

### Increasing Agricultural Production

As the global population grows, there is a continuous need to increase agricultural production to meet the demand for food. Agricultural practices focus on maximizing crop yields to ensure an adequate food supply. However, higher yields also mean larger quantities of harvested grains that need protection during storage. After crops are harvested, they are vulnerable to various threats such as pests, insects, fungi, and rodents during the storage period. Post-harvest losses can significantly impact the quantity and quality of the harvested grains. Grain protectants play a crucial role in preventing these losses by preserving the stored grains. Ensuring food security is a global priority. With the need to feed a growing population, protecting harvested grains becomes paramount. Grain protectants contribute to maintaining the quality and quantity of stored grains, supporting food security efforts globally. The globalization of food supply chains means that grains are transported over long distances, and they may be stored for extended periods before reaching consumers. Effective grain protection becomes essential to prevent spoilage, contamination, and losses during transportation and storage.

The expansion of agricultural activities, including the cultivation of new areas and the introduction of new crops, contributes to the overall increase in agricultural production. This expansion often leads to an increased demand for grain protectants to secure the harvested produce. Changing climate patterns can impact pest behavior and increase the risk of post-harvest losses. Unpredictable weather conditions

may create new challenges for stored grains, making the use of effective grain protectants even more critical. The adoption of advanced technologies in agriculture, such as precision farming and smart storage solutions, can increase overall agricultural production. These technologies often go hand in hand with the use of modern grain protectants for efficient and targeted pest management. Regulatory standards for food safety and quality necessitate the use of grain protectants to meet these standards. Compliance with regulations becomes crucial for agricultural producers, further driving the demand for effective grain protection. This factor will help in the development of the Global Grain Protectants Market.

### Advancements in Agricultural Technologies

Advancements in precision agriculture technologies enable farmers to apply inputs, including grain protectants, with precision and accuracy. This targeted approach optimizes the use of protectants, ensuring effective pest control while minimizing wastage. Integration of digital monitoring systems and sensors in agriculture allows for real-time tracking of environmental conditions, including temperature, humidity, and pest presence. This data-driven approach enhances the efficiency of grain protection measures by providing timely information for decision-making. The development of smart storage technologies allows for better control over storage conditions. Automated ventilation, temperature control, and monitoring systems help create an environment less conducive to pests and fungi, reducing the reliance on chemical interventions. Biotechnological advancements contribute to the development of crop varieties with inherent resistance to pests. This reduces the need for external protectants and enhances the overall resilience of crops during storage. The use of drones and remote sensing technologies enables farmers to survey large agricultural areas efficiently. This technology aids in the early detection of pest infestations, allowing for targeted application of grain protectants where and when they are most needed. The application of data analytics and machine learning in agriculture facilitates predictive modeling of pest outbreaks. Farmers and agricultural professionals can use these insights to proactively implement grain protection strategies, optimizing the use of protectants.

Mobile applications provide farmers with instant access to information and recommendations regarding grain protection. Connectivity allows for timely communication of best practices, weather alerts, and pest management strategies, contributing to effective grain protection. Advancements in automated application systems for agricultural inputs, including grain protectants, improve the precision and uniformity of application. This reduces human error and ensures that the protectants are

applied evenly across the stored grains. Increasing awareness of environmental concerns prompts the development of technologies that monitor the impact of agricultural practices on the environment. Sustainable grain protectants and eco-friendly formulations align with these environmental considerations. Agricultural technologies are often integrated into comprehensive farm management systems. This integration streamlines decision-making processes, allowing farmers to incorporate grain protection measures seamlessly into their overall farm strategies. This factor will pace up the demand of the Global Grain Protectants Market.

### Growing Consumer Awareness and Demand for Quality

Consumers are increasingly concerned about the quality of the food they consume. Grain protectants help maintain the quality of stored grains by preventing contamination, mold, and pest infestations. As consumers demand high-quality food products, there is a corresponding need for effective grain protection measures. Stringent food safety standards and regulations exist globally. Grain protectants contribute to compliance with these standards by ensuring that stored grains are free from harmful contaminants and pests. This aligns with consumer expectations for safe and quality food products. Some pests and fungi can produce toxins that contaminate grains, posing health risks to consumers. Grain protectants help prevent the development of these toxins, addressing consumer concerns about the safety of the food supply.

Effective grain protectants contribute to preserving the nutritional value of stored grains. Consumers are increasingly conscious of the nutritional content of the food they consume, and grain protectants play a role in maintaining the quality of grains over time. Grain protectants assist in minimizing post-harvest losses due to pests and spoilage. As consumers become more aware of the environmental impact of food waste, there is a growing demand for practices and products, such as grain protectants, that contribute to reducing waste in the food supply chain. Modern consumers are often interested in the transparency of the food supply chain. The use of grain protectants and adherence to quality standards contribute to a transparent and traceable supply chain, addressing consumer concerns about the origin and handling of food products. Some consumers prefer organic and natural food products. The demand for grain protectants that align with organic farming practices or have minimal environmental impact is driven by consumer preferences for sustainable and eco-friendly agriculture.

With increased access to information, consumers are more aware of global issues, including challenges in agriculture and food production. Consumer awareness of the importance of grain protectants in ensuring a stable and secure food supply contributes

market demand. Food producers and retailers are mindful of their brand reputation. Using effective grain protectants maintain the quality of stored grains contributes building consumer trust in the brand, which is crucial for long-term success in the market. Educated and informed consumers make choices based on knowledge about the production and processing of food. The demand for grain protectants is influenced by consumers understand the role of these products in ensuring food safety, quality, and sustainability. This factor will accelerate the demand of the Global Grain Protectants Market.

## Key Market Challenges

### Resistance Development

Over time, repeated use of the same grain protectants with the same mode of action can lead the development of resistance in target pests. As resistance emerges, the effectiveness of the protectants diminishes, making it challenging control pest populations. Resistance development can have severe economic consequences for farmers and the agricultural industry. When pests become resistant commonly used grain protectants, farmers may experience increased crop losses, reduced yields, and higher production costs due the need for more expensive or alternative pest control measures. Resistance narrows the range of effective chemical options available for pest control. As more pests develop resistance, farmers may face a limited selection of grain protectants, making it difficult manage pest infestations effectively. The ongoing need stay ahead of resistance development requires continuous innovation in the development of new grain protectants with different modes of action. This places a demand on research and development efforts within the industry create novel and effective formulations. To mitigate resistance, farmers are encouraged implement strategies such as rotating different classes of grain protectants and adopting integrated pest management practices. However, these strategies require careful planning and implementation. Resistance development is not always immediately apparent. It may take time for farmers detect resistance in the field, leading delayed responses and potentially greater challenges in managing resistant pest populations.

### Storage Infrastructure

Some regions have inadequate storage facilities, including silos, warehouses, and bins. Poorly designed or maintained storage structures can contribute increased risks of pest infestations and reduce the efficacy of grain protectants. Proper aeration and

ventilation are essential for maintaining optimal storage conditions. Inadequate airflow can create pockets of high humidity, providing a conducive environment for pests and fungi. Grain protectants may not be as effective in poorly ventilated spaces. Fluctuations in temperature and humidity levels within storage facilities can impact the performance of grain protectants. Inconsistent conditions may lead to challenges in maintaining the desired efficacy of the protectants over time. The absence of advanced monitoring systems, such as temperature and humidity sensors, can hinder the ability to detect changes in storage conditions promptly. Without real-time data, it becomes challenging to implement timely interventions and optimize the use of grain protectants. Aging storage structures or those with structural integrity issues may allow entry points for pests. Gaps, cracks, or other vulnerabilities can compromise the effectiveness of grain protectants by enabling pest entry and reducing the containment of treated grains.

## Key Market Trends

### Focus on Residue Management

Increasingly stringent regulations regarding pesticide residues in food products have prompted the grain protectants industry to emphasize residue management. Compliance with regulatory standards is essential for market access and maintaining consumer confidence. Consumers are becoming more conscious of the food they consume, and there is a growing demand for products with minimal chemical residues. As awareness increases, grain protectant manufacturers are adopting residue management strategies to address consumer concerns about the safety of food products. Many countries and trading blocs have established strict regulations on maximum residue limits (MRLs) for pesticides in imported food products. To meet these requirements and ensure access to international markets, grain protectant producers focus on residue management practices. The adoption of integrated pest management practices, which include a combination of biological control, cultural practices, and judicious use of pesticides, aligns with residue management objectives. IPM aims to minimize the environmental impact and residues associated with pest control. The broader trend towards sustainable agriculture has influenced the grain protectants market. Manufacturers are developing products and strategies that align with sustainability goals, including reducing chemical residues in the environment.

### Segmental Insights

### Control Method Insights

Based on control method, Chemical emerged as the dominating segment in the Global Grain Protectants Market during the forecast period. Chemical-based grain protectants are often valued for their effectiveness in providing broad-spectrum control against a wide range of pests, including insects, fungi, and rodents. This versatility in pest control can drive the demand for chemical formulations. Chemical grain protectants with a proven track record of success in protecting stored grains from pests may gain increased adoption. Farmers and storage facility operators may prefer chemical options that have demonstrated reliability over time. Some chemical grain protectants offer longer residual activity, providing extended protection during the storage period. This characteristic can be advantageous in preventing infestations over an extended time frame, contributing to the appeal of chemical solutions. Chemical grain protectants are often formulated for convenient and easy application. This ease of use can be attractive to farmers and storage operators, especially when compared to alternative methods that may require more complex application procedures. Chemical grain protectants that meet regulatory standards and have received necessary approvals for use in different regions can experience increased adoption. Compliance with regulatory requirements is crucial for market access and consumer acceptance.

### Target Pest Insights

Based on target pest, Insects segment is projected to experience rapid growth in the Global Grain Protectants Market during the forecast period. Insect pests pose a significant threat to stored grains, causing losses in quality and quantity. As global food production and storage capacities increase, the need for effective insect control becomes more critical, driving the demand for insect-specific grain protectants. With growing awareness of environmental sustainability and consumer preferences for eco-friendly products, there is an increasing demand for grain protectants that specifically target insects without causing harm to non-target organisms or the environment. Biopesticides and insect-specific formulations may align with this trend. In some regions, there has been a resurgence of pest populations with resistance to traditional insecticides. This resistance can lead to a greater demand for innovative insect-specific grain protectants with different modes of action. Insects can contribute to the contamination of stored grains, affecting food safety and quality. The food industry's emphasis on delivering safe and high-quality products may drive the adoption of effective insect control measures in grain storage.

### Regional Insights

Based on region, North America emerged as the dominant region in the Global Grain Protectants Market in 2023. North America, particularly the United States and Canada, has a significant agricultural sector with extensive crop production. The demand for grain protectants is higher in regions with large-scale agriculture due to the need for effective pest control in grain storage. North America often adopts and invests in advanced agricultural technologies. The use of innovative grain protectants, precision agriculture, and integrated pest management practices could contribute to the region's dominance in the market. North America tends to have strict regulatory standards for food safety and agricultural products. This could drive the demand for high-quality grain protectants that meet these standards, giving a competitive advantage to manufacturers in the region. The presence of research and development facilities focused on agricultural solutions and crop protection in North America may contribute to the development and introduction of advanced grain protectants.

### Key Market Players

BASF SE

Bayer AG

Syngenta Crop Protection AG

Sumitomo Chemical Co., Ltd.

FMC Corporation

UPL Ltd.

Central Garden & Pet Company

### Report Scope:

In this report, the Global Grain Protectants Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Grain Protectants Market, By Control Method:



Chemical

Physical

Biological

Grain Protectants Market, By Target Pest:

Insects

Rodents

Others

Grain Protectants Market, By Grain Type:

Corn

Wheat

Rice

Others

Grain Protectants Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia Pacific

China

Japan

India

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 presents in the Global

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Grain Protectants Market.

Available Customizations:

Global Grain Protectants Market report with the given market data, TechSci 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. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, and Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL GRAIN PROTECTANTS MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Control Method (Chemical, Physical, Biological)
  - 5.2.2. By Target Pest (Insects, Rodents, Others)
  - 5.2.3. By Grain Type (Corn, Wheat, Rice, Others)
  - 5.2.4. By Region

- 5.2.5. By Company (2023)
- 5.3. Market Map

## **6. NORTH AMERICA GRAIN PROTECTANTS MARKET OUTLOOK**

- 6.1. Market Size & Forecast
  - 6.1.1. By Value
- 6.2. Market Share & Forecast
  - 6.2.1. By Control Method
  - 6.2.2. By Target Pest
  - 6.2.3. By Grain Type
  - 6.2.4. By Country
- 6.3. North America: Country Analysis
  - 6.3.1. United States Grain Protectants Market Outlook
    - 6.3.1.1. Market Size & Forecast
      - 6.3.1.1.1. By Value
    - 6.3.1.2. Market Share & Forecast
      - 6.3.1.2.1. By Control Method
      - 6.3.1.2.2. By Target Pest
      - 6.3.1.2.3. By Grain Type
  - 6.3.2. Canada Grain Protectants Market Outlook
    - 6.3.2.1. Market Size & Forecast
      - 6.3.2.1.1. By Value
    - 6.3.2.2. Market Share & Forecast
      - 6.3.2.2.1. By Control Method
      - 6.3.2.2.2. By Target Pest
      - 6.3.2.2.3. By Grain Type
  - 6.3.3. Mexico Grain Protectants Market Outlook
    - 6.3.3.1. Market Size & Forecast
      - 6.3.3.1.1. By Value
    - 6.3.3.2. Market Share & Forecast
      - 6.3.3.2.1. By Control Method
      - 6.3.3.2.2. By Target Pest
      - 6.3.3.2.3. By Grain Type

## **7. EUROPE GRAIN PROTECTANTS MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value

- 7.2. Market Share & Forecast
  - 7.2.1. By Control Method
  - 7.2.2. By Target Pest
  - 7.2.3. By Grain Type
  - 7.2.4. By Country
- 7.3. Europe: Country Analysis
  - 7.3.1. Germany Grain Protectants Market Outlook
    - 7.3.1.1. Market Size & Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share & Forecast
      - 7.3.1.2.1. By Control Method
      - 7.3.1.2.2. By Target Pest
      - 7.3.1.2.3. By Grain Type
  - 7.3.2. United Kingdom Grain Protectants Market Outlook
    - 7.3.2.1. Market Size & Forecast
      - 7.3.2.1.1. By Value
    - 7.3.2.2. Market Share & Forecast
      - 7.3.2.2.1. By Control Method
      - 7.3.2.2.2. By Target Pest
      - 7.3.2.2.3. By Grain Type
  - 7.3.3. Italy Grain Protectants Market Outlook
    - 7.3.3.1. Market Size & Forecast
      - 7.3.3.1.1. By Value
    - 7.3.3.2. Market Share & Forecast
      - 7.3.3.2.1. By Control Method
      - 7.3.3.2.2. By Target Pest
      - 7.3.3.2.3. By Grain Type
  - 7.3.4. France Grain Protectants Market Outlook
    - 7.3.4.1. Market Size & Forecast
      - 7.3.4.1.1. By Value
    - 7.3.4.2. Market Share & Forecast
      - 7.3.4.2.1. By Control Method
      - 7.3.4.2.2. By Target Pest
      - 7.3.4.2.3. By Grain Type
  - 7.3.5. Spain Grain Protectants Market Outlook
    - 7.3.5.1. Market Size & Forecast
      - 7.3.5.1.1. By Value
    - 7.3.5.2. Market Share & Forecast
      - 7.3.5.2.1. By Control Method

- 7.3.5.2.2. By Target Pest
- 7.3.5.2.3. By Grain Type

## **8. ASIA PACIFIC GRAIN PROTECTANTS MARKET OUTLOOK**

### 8.1. Market Size & Forecast

- 8.1.1. By Value

### 8.2. Market Share & Forecast

- 8.2.1. By Control Method
- 8.2.2. By Target Pest
- 8.2.3. By Grain Type
- 8.2.4. By Country

### 8.3. Asia Pacific: Country Analysis

#### 8.3.1. China Grain Protectants Market Outlook

- 8.3.1.1. Market Size & Forecast
  - 8.3.1.1.1. By Value
- 8.3.1.2. Market Share & Forecast
  - 8.3.1.2.1. By Control Method
  - 8.3.1.2.2. By Target Pest
  - 8.3.1.2.3. By Grain Type

#### 8.3.2. India Grain Protectants Market Outlook

- 8.3.2.1. Market Size & Forecast
  - 8.3.2.1.1. By Value
- 8.3.2.2. Market Share & Forecast
  - 8.3.2.2.1. By Control Method
  - 8.3.2.2.2. By Target Pest
  - 8.3.2.2.3. By Grain Type

#### 8.3.3. Japan Grain Protectants Market Outlook

- 8.3.3.1. Market Size & Forecast
  - 8.3.3.1.1. By Value
- 8.3.3.2. Market Share & Forecast
  - 8.3.3.2.1. By Control Method
  - 8.3.3.2.2. By Target Pest
  - 8.3.3.2.3. By Grain Type

#### 8.3.4. South Korea Grain Protectants Market Outlook

- 8.3.4.1. Market Size & Forecast
  - 8.3.4.1.1. By Value
- 8.3.4.2. Market Share & Forecast
  - 8.3.4.2.1. By Control Method

- 8.3.4.2.2. By Target Pest
- 8.3.4.2.3. By Grain Type
- 8.3.5. Australia Grain Protectants Market Outlook
  - 8.3.5.1. Market Size & Forecast
    - 8.3.5.1.1. By Value
  - 8.3.5.2. Market Share & Forecast
    - 8.3.5.2.1. By Control Method
    - 8.3.5.2.2. By Target Pest
    - 8.3.5.2.3. By Grain Type

## **9. SOUTH AMERICA GRAIN PROTECTANTS MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Control Method
  - 9.2.2. By Target Pest
  - 9.2.3. By Grain Type
  - 9.2.4. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Grain Protectants Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Control Method
      - 9.3.1.2.2. By Target Pest
      - 9.3.1.2.3. By Grain Type
  - 9.3.2. Argentina Grain Protectants Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Control Method
      - 9.3.2.2.2. By Target Pest
      - 9.3.2.2.3. By Grain Type
  - 9.3.3. Colombia Grain Protectants Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Control Method



9.3.3.2.2. By Target Pest

9.3.3.2.3. By Grain Type

## **10. MIDDLE EAST AND AFRICA GRAIN PROTECTANTS MARKET OUTLOOK**

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Control Method

10.2.2. By Target Pest

10.2.3. By Grain Type

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Grain Protectants Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Control Method

10.3.1.2.2. By Target Pest

10.3.1.2.3. By Grain Type

10.3.2. Saudi Arabia Grain Protectants Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Control Method

10.3.2.2.2. By Target Pest

10.3.2.2.3. By Grain Type

10.3.3. UAE Grain Protectants Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Control Method

10.3.3.2.2. By Target Pest

10.3.3.2.3. By Grain Type

## **11. MARKET DYNAMICS**

11.1. Drivers

11.2. Challenges

## **12. MARKET TRENDS & DEVELOPMENTS**

- 12.1. Merger & Acquisition (If Any)
- 12.2. Product Launches (If Any)
- 12.3. Recent Developments

## **13. PORTERS FIVE FORCES ANALYSIS**

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

## **14. COMPETITIVE LANDSCAPE**

- 14.1. BASF SE
  - 14.1.1. Business Overview
  - 14.1.2. Company Snapshot
  - 14.1.3. Products & Services
  - 14.1.4. Financials (As Reported)
  - 14.1.5. Recent Developments
  - 14.1.6. Key Personnel Details
  - 14.1.7. SWOT Analysis
- 14.2. Bayer AG
- 14.3. Syngenta Crop Protection AG
- 14.4. Sumitomo Chemical Co., Ltd.
- 14.5. FMC Corporation.
- 14.6. UPL Ltd.
- 14.7. Central Garden & Pet Company

## **15. STRATEGIC RECOMMENDATIONS**

## **16. ABOUT US & DISCLAIMER**

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