

# **Insecticide Seed Treatment Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Synthetic Chemicals and Biological), By Crop Type (Cereals & Oilseeds, Fruits & Vegetables and Others), By Form (Liquid and Powder), By Application Method (Seed Dressing, Seed Coating and Seed Pelleting), By Region and Competition**

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## **Abstracts**

Global Insecticide Seed Treatment Market has valued at USD 5.85 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.36% through 2028. Insecticide seed treatment, a widely adopted practice in modern agriculture, involves the meticulous process of coating seeds with specific insecticides before planting. This crucial step serves as a protective shield, safeguarding both seeds and emerging seedlings from a diverse range of pests that pose a threat to crops during their vulnerable early stages of growth. By creating a fortified barrier, the insecticide treatment ensures that crops receive a healthier start, significantly reducing the risk of damage and potentially leading to higher yields. As a staple strategy, particularly in large-scale farming operations, insecticide seed treatment plays a pivotal role in promoting crop resilience and overall agricultural productivity.

### **Key Market Drivers**

#### **Increasing Demand for Crop Yield & Efficiency**

The global demand for insecticide seed treatment is anticipated to rise significantly,

spurred by an increasing need for crop yield and efficiency. As the world's population continues to surge, the ability to maximize food production has become a global imperative. Seed treatment with insecticides is a crucial element in this quest, providing an effective first line of defense against pest infestation and disease, thereby securing crop quality and improving yield. Moreover, with the intensification of farming practices, crop rotation frequency has seen a rise, leading to an increase in pest-related concerns. Insecticide seed treatments tackle these problems upfront, curbing potential losses and ensuring healthier crops. Sustainable agricultural practices with a focus on efficiency also drive this demand. Producers are turning to insecticide seed treatments as they use lesser quantities than traditional spray applications, reducing environmental impact while maintaining efficacy. The pressure to increase agricultural output, coupled with the need for environmentally conscious solutions, is expected to influence the growth of the insecticide seed treatment market globally.

### Rise in the Global Population Leading to Higher Food Demand

The rapidly increasing global population is significantly driving the demand for food supply worldwide, consequently escalating the need for insecticide seed treatments. As the world attempts to meet the escalating food demand, agricultural production must increase substantially. This demand creates an immense pressure on the agricultural sector to maximize yield per unit of land. Insecticide seed treatments come into play here, as they provide an effective measure to protect crops from harmful pests, thereby ensuring optimum yield. The use of these treatments has been recognized as an economical and eco-friendly approach towards pest management. They are applied directly to the seed, lessening the possible environmental impact. As the global population continues to rise, it is anticipated that the reliance on such advanced agricultural practices will also grow. This makes the insecticide seed treatment industry a critical component in the global quest against hunger. Therefore, the expanding global populace is not only heightening the demand for food but is also indirectly propelling the demand for insecticide seed treatments on a global scale.

### Advancements in Agricultural Technologies

Advancements in agricultural technologies are set to propel the demand for insecticide seed treatments on a global scale. The integration of innovative technologies such as precision farming, which includes GPS and remote sensing, allows for enhanced efficiency in insecticide application. This technology not only improves the accuracy of seed treatment but also reduces wastage, thereby creating a sustainable farming practice. Additionally, the advent of advanced bioinformatics tools promises a new era

in seed genetics, potentially leading to the production of seeds inherently resistant to pests, but simultaneously increasing the demand for specialized insecticide treatments. The burgeoning population, coupled with the escalating demand for food security, further fuels the need for insecticide seed treatments to maximize crop yield. Furthermore, an increasing awareness of environmental preservation and the stringent regulations imposed on harmful pesticides have steered the focus towards safer, more effective insecticides. This shift promotes the development and adoption of insecticide seed treatments as a viable, eco-friendly alternative to conventional pesticides. As a result, we anticipate a strong surge in the demand for insecticide seed treatment at a global level.

### Higher Adoption Rate of GM Seeds

The adoption rate of genetically modified (GM) seeds is seeing a significant surge globally. This shift is largely driven by the need to enhance agricultural productivity and sustainability, amidst growing population and environmental changes. With the use of GM seeds, crops become more resistant to diseases and pests, effectively increasing yield. However, this doesn't completely eliminate the need for seed treatment with insecticides. In fact, the demand for insecticide seed treatment is anticipated to rise alongside the increasing adoption of GM seeds. The rationale is that GM seeds, though pest-resistant, are not entirely immune to pest attacks. Insecticide seed treatment acts as an additional layer of protection, ensuring the seed's survival during the crucial germination period. Furthermore, certain pests have shown an ability to adapt and become resistant to the inherent defenses of GM seeds, necessitating the use of insecticides. Therefore, with the rising global adoption of GM seeds, we can expect a corresponding increase in the demand for insecticide seed treatments, affirming their role as a vital cog in the global agricultural machinery.

### Key Market Challenges

#### Increasing Cases of Insecticides Resistance

The escalating prevalence of insecticide resistance is anticipated to dampen global demand for insecticide seed treatments. Insecticide resistance occurs when target pests evolve and develop immunity to the chemicals designed to eradicate them. This evolutionary adaptation diminishes the efficacy of insecticides, rendering them increasingly ineffective over time. Continuous and repeated use of the same insecticides not only encourages the development of resistant strains but may also inflict harm on non-target organisms and the greater ecological system. Consequently,

this rising trend of resistance is casting doubt on the long-term viability of insecticide seed treatments as a sustainable pest management strategy. Furthermore, there are burgeoning concerns about the environmental and health implications of persistent insecticide use, which in turn, is fueling a shift towards alternative, eco-friendly pest management solutions. These include biological control methods, organic pesticides, and genetically modified (GM) crops with in-built resistance to pests. As more and more farmers and agricultural enterprises gravitate towards these innovative, sustainable alternatives, global demand for traditional insecticide seed treatments is likely to see a significant decline.

### High Costs Associated with Research & Development

The high costs associated with Research and Development (R&D) are expected to have a significant impact on the global demand for insecticide seed treatment. The process of developing new insecticide formulas that are effective, safe, and compliant with regulatory standards demands extensive investment in terms of time, resources, and capital. These costs, which include laboratory experiments, field trials, and regulatory approvals, are typically passed onto the end-users, leading to a rise in the price of insecticide seed treatments.

Furthermore, the ongoing pursuit of sustainable and environmentally friendly agricultural practices is encouraging the development of alternative pest control methods, such as biological seed treatments. These natural solutions aim to minimize the use of chemical insecticides and promote a more balanced and eco-friendly approach to pest management. While these alternative methods may offer benefits in terms of reduced environmental impact and enhanced biodiversity, they also pose a challenge to the traditional insecticide seed treatment market. The combination of high R&D costs and shifting agricultural trends is thus expected to depress global demand for insecticide seed treatments. However, it also presents opportunities for innovation and the development of more sustainable and cost-effective solutions to pest control in agriculture.

### Key Market Trends

#### Increasing Prevalence of Crop Diseases

The global agricultural industry is facing a growing challenge in the form of increasing prevalence of crop diseases. This issue not only threatens the yield and quality of crops, but also poses a significant risk to food security worldwide. In order to mitigate these

challenges, farmers and agricultural scientists alike are turning to innovative solutions such as insecticide seed treatments. These treatments are expected to see a significant rise in demand as they offer a proactive and effective approach to disease management in crops. By treating seed with insecticides prior to planting, farmers are able to protect their crops from the very onset, significantly reducing the chances of disease outbreaks. Furthermore, these treatments also offer protection against a wide range of pests, adding another layer of defense for crops. As the prevalence of crop diseases continues to rise, it is anticipated that these insecticide seed treatments will become an increasingly vital tool in global agricultural practices, driving significant demand and growth in the market. This approach not only ensures healthier crop yield but also contributes to sustainable farming practices by reducing the need for post-planting pesticide application.

### Development of Low-Cost & Efficient Insecticides

The global demand for Insecticide Seed Treatment (IST) is anticipated to rise significantly due to the development of low-cost and efficient insecticides. This surge can largely be attributed to the need for higher agricultural productivity to feed the rising global population, coupled with the constant threat posed by pests to crop yields. Low-cost insecticides make IST a cost-effective solution for farmers, especially those in developing regions where financial resources may be constrained. Efficient ISTs ensure maximum crop protection, reducing the risk of yield loss and offering a high return on investment. Furthermore, they contribute to sustainable farming by reducing the need for blanket application of insecticides, thus lessening environmental impact. The availability of these affordable and effective ISTs is likely to stimulate adoption by farmers globally, thereby driving market expansion. By providing a dual benefit of cost saving and enhanced crop yield, the development of low-cost & efficient insecticides is indeed becoming a key factor in the growing demand for Insecticide Seed Treatment worldwide.

### Segmental Insights

#### Type Insights

Based on the type, Synthetic chemicals currently dominate the market, holding a larger share compared to biologicals. These chemicals are favoured for their high efficiency and wide-ranging pest control capabilities, making them extensively used across different regions. However, there is a gradual shift towards biologicals, driven by the growing concerns for the environment and the implementation of stricter regulations on

chemical pesticides. As awareness about the potential negative impacts of synthetic chemicals increases, there is a rising demand for environmentally friendly and sustainable alternatives like biologicals. These biological solutions offer targeted pest control methods, minimizing harm to beneficial organisms and reducing the accumulation of harmful residues in the environment. The adoption of biologicals not only aligns with sustainable agricultural practices but also promotes the preservation of biodiversity and the long-term health of ecosystems.

In addition to their eco-friendly nature, biologicals provide unique advantages in terms of specificity and long-term effectiveness. By using naturally occurring substances and organisms, biologicals can offer a highly targeted approach to pest control, minimizing the impact on non-target organisms and reducing the risk of resistance development. Moreover, the use of biologicals can contribute to the overall health of the soil and enhance the natural balance within agricultural ecosystems. Furthermore, the adoption of biologicals can bring economic benefits to farmers and agricultural communities. While initially, the cost of transitioning to biologicals may be higher due to the need for research, development, and production, in the long run, the reduced reliance on synthetic chemicals can lead to cost savings. Additionally, the growing market demand for organic and sustainable products can create new opportunities for farmers who embrace biological solutions.

### Crop Type Insights

Based on the Crop Type, the Global Insecticide Seed Treatment Market is currently dominated by the 'Cereals & Oilseeds' segment. This is primarily due to the substantial demand for cereals and oilseeds worldwide. These crops play a crucial role in providing sustenance and raw materials for various industries, ranging from food and beverage to biofuels and pharmaceuticals. Insecticide seed treatments have emerged as a critical solution in safeguarding these valuable crops from destructive pests. By protecting the seeds right from their inception, these treatments ensure optimal yield and high-quality produce. Moreover, they contribute to sustainable agriculture practices by minimizing the need for additional pesticide applications throughout the crop growth cycle.

The significance of insecticide seed treatments extends beyond crop protection. They also play a vital role in ensuring global food security. With the ever-increasing global population, the demand for food continues to rise. Insecticide seed treatments contribute to meeting this demand by reducing crop losses caused by pests, ultimately supporting a more stable food supply. The dominance of the 'Cereals & Oilseeds' segment in the Global Insecticide Seed Treatment Market is a testament to the crucial

role of these crops in various industries. Insecticide seed treatments not only protect crops from pests but also contribute to sustainable agriculture and food security worldwide.

## Regional Insights

The Asia Pacific region is currently dominating the global Insecticide Seed Treatment Market, and this can be attributed to a combination of several key factors. Firstly, the region boasts an expansive agricultural sector, with a large number of smallholder farmers who play a crucial role in driving the demand for insecticide seed treatments. Moreover, there has been a significant increase in awareness about the numerous benefits of these treatments in terms of crop yield and quality, thus leading to a higher adoption rate. Furthermore, the Asia Pacific region is home to a diverse array of crop pests, which further emphasizes the importance of effective insecticide treatments. Lastly, the presence of favorable government policies and subsidies in countries like China and India has played a pivotal role in promoting and encouraging the widespread use of these treatments, thereby consolidating the Asia Pacific region's leading position in the market. With these factors in play, it is evident that the Asia Pacific region is well-positioned to maintain its dominance in the Insecticide Seed Treatment Market.

## Key Market Players

Syngenta International AG

Bayer CropScience AG

BASF SE

DuPont de Nemours, Inc.

ADAMA Agricultural Solutions Ltd

BioWorks Inc.

Germaines Seed Technology

Incotec Group BV

Nufarm Ltd

Valent Biosciences Corporation

Report Scope:

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

Insecticide Seed Treatment Market, By Type:

Synthetic Chemicals

Biological

Insecticide Seed Treatment Market, By Crop Type:

Cereals & Oilseeds

Fruits & Vegetables

Others

Insecticide Seed Treatment Market, By Form:

Liquid

Powder

Insecticide Seed Treatment Market, By Application Method:

Seed Dressing

Seed Coating

Seed Pelleting

Insecticide Seed Treatment 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 Insecticide Seed Treatment Market.

## Available Customizations:

Global Insecticide Seed Treatment 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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