

Pesticides Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Herbicides, Fungicides, Insecticides, Others), By Product (Synthetic Pesticides & Bio Pesticides), By Application (Cereal, Fruits, Plantation Crops, Vegetables & Others), By Formulation (Dry & Liquid), By Region and Competition

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Abstracts

Global Pesticides Market has valued at USD 1.45 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 9.67% through 2028. Pesticides are chemical substances used primarily in agriculture to control pests that damage or hinder the growth of crops. These pests can include insects, weeds, fungi, rodents, and other organisms, posing significant threats to crop yield and quality. Pesticides function by deterring, incapacitating, killing, or otherwise discouraging pests, ensuring the overall health and productivity of agricultural systems.

However, it is important to note that the use of pesticides must be carefully managed and regulated. Overuse or improper application of pesticides can have detrimental effects on the environment and human health. Pesticides can contaminate soil, water sources, and the air, posing risks to ecosystems and non-target organisms. Additionally, exposure to certain pesticides can have adverse effects on human health, including acute and chronic toxicity.

To mitigate these potential risks, it is crucial to adopt sustainable and integrated pest management practices. This approach aims to minimize pesticide use through the

implementation of alternative pest control strategies, such as biological control, crop rotation, and use of resistant crop varieties. Furthermore, education and awareness programs can help farmers and agricultural workers understand the proper handling, application, and disposal of pesticides, ensuring their safe and effective use.

Key Market Drivers

Increasing Crop Loss Due to Pests & Diseases

The escalating issue of crop loss due to pests and diseases is a significant concern for agriculture worldwide and is expected to vigorously drive the global demand for pesticides. As per recent studies, approximately 20-40% of global crop yields are lost annually due to the adverse effects of pests and diseases, a situation exacerbated by climate change and monoculture agricultural practices. These losses not only result in devastating economic consequences for farmers but also pose a threat to global food security, as increasing population rates necessitate higher crop yields. To combat these challenges, farmers are turning to pesticides as a primary line of defense. Pesticides, when used properly, can dramatically reduce crop losses by effectively controlling a broad spectrum of agricultural pests and diseases. Consequently, the pesticide market is expected to witness substantial growth as the global agricultural sector seeks high-quality, efficient solutions to safeguard crop health and boost productivity. However, it's pertinent to also focus on integrated pest management practices that balance pesticide use with environmental sustainability and public health considerations.

Advancements in Integrated Pest Management Solutions

Advancements in Integrated Pest Management (IPM) solutions are poised to significantly boost the global demand for pesticides. IPM is a progressive, eco-friendly approach that emphasizes the sustainable use of pest-control methods, reducing reliance on chemical pesticides, and minimizing environmental impact. However, even within this framework, pesticides continue to play a critical role. The advances in IPM now often integrate biopesticides and other safer pesticide options, leading to a new wave of demand. The increasing global burden of crop diseases and pests, coupled with the need for higher agricultural yields, is also driving this trend. Furthermore, the advent of precision agriculture technologies, which involves the use of GPS, remote sensing, and Internet of Things (IoT) devices, is enabling more targeted and efficient use of pesticides. These technologies ensure that pesticides are deployed only when and where they are most needed, thereby saving costs, increasing crop yields, and reducing environmental impact. As such, the advancements in IPM do not eliminate the

need for pesticides, but rather they transform it, linking it with sustainable practices and innovative technologies, and thereby fueling its global demand.

Growing Demand for Bio-Pesticides

The global demand for pesticides is anticipated to escalate, largely driven by the increasing preference for bio-pesticides. As the world becomes more environmentally conscious, the agricultural sector is progressively shifting from synthetic to biological pesticides. Bio-pesticides, derived from natural materials such as animals, bacteria, minerals, and plants, offer a sustainable and eco-friendly solution to pest control. They not only minimize harmful environmental impacts but also pose fewer risks to human health. The rise in organic farming, coupled with stringent regulations on chemical pesticide usage, further propels the demand for bio-pesticides. Additionally, bio-pesticides are effective in pest resistance management, adding to their attractiveness. The growing public awareness and government initiatives promoting the use of organic and environmentally-friendly products are further expected to stimulate the global pesticide market, prominently augmenting the demand for bio-pesticides. Thus, the surging preference for these green alternatives is set to impact the overall pesticide industry positively, driving its growth on a global scale.

High Adoption Rates of GM Crops

The global adoption of genetically modified (GM) crops is predicted to trigger a surge in the demand for pesticides. GM crops, engineered for traits such as pest resistance and higher yield, ironically, might escalate the need for pesticide usage on a global scale. The reason behind this paradox is the potential development of 'super pests' or pesticide-resistant pests. Over time, pests exposed to GM crops could develop resistance to the built-in pesticides, necessitating the use of stronger, more potent chemical pesticides. Additionally, the anticipated increase in agricultural production due to the proliferation of GM crops will inevitably demand more pesticide use to protect these expanded crop areas. Furthermore, the shift towards GM crops might diminish the implementation of alternative, sustainable farming practices such as organic farming or integrated pest management, which typically use fewer or no chemical pesticides. This shift might lead to an increased dependency on pesticides in agriculture. Therefore, while GM crops promise benefits such as improved crop yields and pest resistance, their high adoption rates could inadvertently drive up the global demand for pesticides.

Key Market Challenges

Emergence of Pest Resistance

Pest resistance is a growing issue that has significant ramifications on the global demand for pesticides. Pests, by evolving and adapting to resist chemical pesticides, have necessitated the need for alternative pest management strategies. These evolved pests are not deterred by standard chemical treatments, rendering these pesticides less effective, thereby reducing their global demand. The increasing prevalence of pest resistance highlights an urgent need for sustainable, biological pest control methods. Such alternatives include biopesticides, which utilize organisms or their byproducts to suppress pests, and integrated pest management, a holistic approach focusing on long-term pest prevention through a combination of techniques such as biological control, habitat manipulation, and modification of cultural practices. These practices not only reduce reliance on chemical pesticides but also pose less environmental harm. Additionally, they are deemed as the future of pest control due to their sustainable and eco-friendly nature. These developments collectively contribute to the decrease in pesticide demand globally, as more farmers and agricultural industries shift towards these resilient, green solutions in response to the emergence of pest resistance.

Counterfeit Pesticide

The global pesticide industry is currently grappling with the growing issue of counterfeit pesticides. Counterfeit pesticides, which are typically substandard or falsely labelled versions of authentic products, pose significant threats not only to consumer health and safety but also to the environment. Furthermore, the infiltration of counterfeit pesticides in the market is anticipated to negatively impact the demand for legitimate pesticides on a global scale. This phenomenon can be attributed to several factors. Counterfeit pesticides often retail at lower prices, which may entice cost-conscious consumers, especially in developing markets where regulatory oversight is lacking. The usage of counterfeit pesticides, being less effective or potentially harmful, can lead to crop failures or environmental damage. These adverse results can, in turn, erode confidence in pesticide products overall, leading to reduced demand. Finally, the rise of counterfeit pesticides could discourage innovation in the legitimate pesticide industry. As counterfeiters free-ride on the research and development investments of authentic manufacturers, the latter may become less incentivised to create new, more efficient and environmentally friendly products. This situation can further decrease the demand for legitimate pesticides. Therefore, concerted global efforts are required to combat the menace of counterfeit pesticides and safeguard the integrity of the global pesticide market.

Key Market Trends

Expansion of Arable Land in Emerging Economies

The expansion of arable land in emerging economies is poised to drive a surge in the global demand for pesticides. As these developing nations ramp up their agricultural production to meet both domestic and international demand, the need for cost-effective, efficient farming practices becomes imperative. Pesticides play a significant role in this context, helping to maximize crop yields by controlling pests, diseases, and weeds that could otherwise devastate entire harvests. The increase in arable land coupled with the growing need for high crop productivity may lead to an increased dependency on pesticides. Further, the adoption of modern farming techniques and government support in these economies often entails using pesticides, thus fueling their demand. On a broader scale, this trend could also be motivated by global food security concerns, as the world population continues to grow, elevating the need for enhanced agricultural production. However, this increased demand for pesticides must be balanced with sustainable practices to minimize potential environmental and health impacts. Therefore, the future will likely see an emphasis on the development and use of environmentally friendly, bio-based pesticides in these emerging economies.

Rise in Research & Development Activities In Agrochemicals

The global demand for pesticides is poised to rise significantly, primarily driven by the surge in research and development activities in the agrochemicals sector. As the global population continues to grow, the pressure on the agricultural sector to increase productivity has never been higher. One key strategy to meet this demand is through the application of advanced agrochemicals, including performance-optimized pesticides, to enhance crop yield and protect against pests. Consequently, substantial investments are being funneled into R&D initiatives by agrochemical companies, focusing on the creation of innovative, efficient, and environmentally-friendly pesticides. A key area of research includes the development of bio-pesticides, which are derived from naturally occurring substances and organisms, to replace traditional chemical pesticides. Another focus is on formulating pesticides that target specific pests, reducing the impact on non-target species and the environment. This focus on innovative, targeted, and sustainable products is resulting in a new generation of pesticides, which in turn is expected to propel global demand. The rise in R&D activities in this sector is therefore a primary driver for the increased demand and use of pesticides worldwide, facilitating enhanced agricultural productivity to meet the needs of a growing global population.

Segmental Insights

Type Insights

Based on the type, the global pesticides market is primarily driven by herbicides, which hold a significant portion of the overall market share. Herbicides, known for their effectiveness in eliminating unwanted plants and weeds, are extensively utilized in both agricultural and non-agricultural settings, making them an indispensable component of modern landscape management practices. Their widespread usage is further facilitated by the rising adoption of herbicide-resistant crop varieties by farmers worldwide. These crop varieties not only provide enhanced control over weeds but also contribute to improved crop yields. As agricultural practices continue to evolve and become more efficient, the demand for herbicides is expected to witness continuous growth, solidifying their dominant position in the global pesticides market.

Product Insights

Based on the Product, in the global pesticides market, synthetic pesticides have long held a significant market share due to their proven effectiveness and cost-efficiency. However, the growing concerns for the environment and increasing awareness about the detrimental impact of synthetic pesticides on human health have prompted a shift towards biopesticides. These biopesticides, derived from natural sources, offer a safer and more sustainable alternative.

Despite the current dominance of synthetic pesticides in the market, it is worth noting that the biopesticides sector is projected to experience substantial growth in the coming years. This growth can be attributed to the increasing demand for eco-friendly and health-conscious pest control solutions. As consumers become more conscious of the potential risks associated with synthetic pesticides, the market is likely to witness a gradual shift towards biopesticides, potentially altering the landscape of market dominance in the future.

Regional Insights

North America is currently dominating the global pesticides market, primarily attributed to the high adoption rates of advanced farming practices and technologies, including pesticides, in the region. The United States, in particular, represents a significant share of the North American market. The favorable climate conditions, extensive agricultural land, and robust regulatory framework further contribute to the region's dominance.

However, the Asia-Pacific region is expected to witness the fastest growth in the coming years. This growth can be attributed to several factors, including the increasing demand for food production to support the growing population and the rising awareness of efficient farming practices. Additionally, the Asia-Pacific region is experiencing rapid urbanization, leading to the conversion of agricultural lands and the need for higher crop yields. As a result, there is a growing demand for pesticides and other agricultural inputs to ensure sustainable food production in the region. While North America currently holds a dominant position in the global pesticides market, the Asia-Pacific region is poised to experience significant growth. The combination of increasing food demand, rising awareness of efficient farming practices, and urbanization-driven agricultural challenges presents immense opportunities for the pesticides market in this region.

Key Market Players

Bayer CropScience

Corteva Agriscience

Syngenta AG

BASF SE

China National Chemical Corporation (ChemChina)

BioWorks Inc.

Marrone Bio Innovations, Inc.

Adama Agricultural Solutions Ltd.

Certis USA L.L.C.

Dow Inc.

Report Scope:

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

Pesticides Market, By Type:

Herbicides

Fungicides

Insecticides

Others

Pesticides Market, By Product:

Synthetic Pesticides

Bio Pesticides

Pesticides Market, By Application:

Cereal

Fruits

Plantation Crops

Vegetables

Others

Pesticides Market, By Formulation:

Dry

Liquid

Pesticides 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 Pesticides Market.

Available Customizations:

Global Pesticides 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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