

Post-Harvesting Treatment Market – Global Industry Size, Share, Trends, Opportunity, & Forecast 2018-2028 Segmented By Type (Coating, Ethylene Blockers, Cleaners, Fungicides, Sprout Inhibitors, Sanitizers, Other), By Crop Type (Fruits, Vegetables, Flowers & Ornamentals), By Origin (Natural, Synthetic), By Region, Competition

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Abstracts

Global Post-Harvesting Treatment Market was valued at USD 2.02 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 7.59% through 2028. The Global Post-Harvest Treatment Market plays a crucial role in ensuring the quality, safety, and longevity of agricultural produce from the point of harvest to consumption. This market encompasses a diverse range of treatments and technologies designed to minimize post-harvest losses, control pests and diseases, and enhance the shelf life of crops.

The Global Post-Harvest Treatment Market is dynamic, driven by a combination of factors ranging from technological advancements to global market dynamics. Understanding these dynamics and trends is crucial for stakeholders aiming to navigate challenges and capitalize on emerging opportunities in this vital sector of the agricultural industry.

Key Market Drivers

Increasing Global Population and Food Demand

The surge in global population inherently correlates with an augmented need for food

resources. This heightened demand necessitates a robust and efficient post-harvest treatment infrastructure to preserve the quality and extend the shelf life of harvested crops. Farmers and stakeholders in the agricultural value chain are increasingly turning to advanced post-harvest treatments to mitigate losses, enhance storage capabilities, and ultimately contribute to global food security.

The expanding global population not only amplifies the demand for food but also creates opportunities for market expansion in the post-harvest treatment sector. With a burgeoning consumer base, there is a parallel need for increased agricultural productivity and efficiency. This dynamic offers a fertile ground for the growth of post-harvest treatment solutions, ranging from crop protection chemicals to advanced storage technologies. Meeting the demands of a growing population necessitates a focus on enhancing agricultural yields. Post-harvest treatments play a crucial role in this context by minimizing post-harvest losses, reducing spoilage, and ensuring that a larger proportion of the harvested produce reaches the market in optimal condition. This emphasis on yield enhancement aligns with the broader goal of achieving food sufficiency and economic sustainability.

The interplay between the increasing global population and food demand extends beyond national borders, shaping the dynamics of the global food supply chain. Post-harvest treatments become integral components in this intricate web, facilitating the smooth movement of agricultural products across regions. To meet international quality standards and consumer expectations, stakeholders in the supply chain are compelled to invest in advanced post-harvest treatments that ensure product integrity during transportation and storage. The pressing need to address the challenges posed by a growing population has spurred increased investments in research and development within the post-harvest treatment sector. Stakeholders are actively exploring innovative solutions, such as bio-based preservatives, smart packaging technologies, and precision application methods, to optimize post-harvest processes and meet the evolving demands of a larger, more discerning consumer base.

Stringent Food Safety Regulations

Stringent food safety regulations serve as a primary motivator for the adoption of post-harvest treatments. These regulations, often designed to safeguard public health, necessitate measures to mitigate risks associated with contamination, spoilage, and the spread of diseases in agricultural produce. Post-harvest treatments, including the use of pesticides, fungicides, and sanitization methods, become integral components of risk management strategies, ensuring that the final products reaching consumers meet

rigorous safety standards.

Globalization has interconnected food supply chains, making adherence to international food safety standards imperative for both domestic and export markets. Post-harvest treatments play a pivotal role in ensuring compliance with these standards. Businesses engaged in cross-border trade are compelled to implement effective treatments to meet the expectations of regulatory bodies such as the FDA in the United States, the European Food Safety Authority (EFSA), or the Food Safety and Standards Authority of India (FSSAI), among others. Stringent food safety regulations contribute to building and maintaining consumer confidence. In an era where consumers are increasingly conscious of the safety and quality of the products they consume, adherence to regulatory standards becomes a significant factor in brand reputation. Companies investing in robust post-harvest treatment processes can not only meet regulatory requirements but also convey a commitment to consumer well-being, thereby enhancing brand trust and loyalty.

Stringent regulations often mandate traceability throughout the food supply chain. Post-harvest treatments that ensure traceability and transparency in production and distribution processes become essential for compliance. Technologies such as blockchain, which enable real-time tracking of food products, are increasingly integrated into post-harvest treatment strategies to meet these regulatory demands and provide consumers with verifiable information about the origin and safety of their food. Meeting stringent food safety regulations is a prerequisite for accessing international markets. Countries and regions with rigorous regulatory frameworks become gatekeepers for businesses seeking to export agricultural products. Effective post-harvest treatments not only facilitate market access but also open doors to export opportunities, positioning businesses favorably in the global marketplace.

Advancements in Post-Harvest Technologies

Advancements in post-harvest technologies include the implementation of precision agriculture techniques. This involves the use of technologies such as drones, sensors, and automated equipment for precise application of post-harvest treatments. Precision methods optimize the use of resources, reduce waste, and enhance the targeted delivery of treatments, contributing to increased efficiency in post-harvest processes.

The integration of smart packaging technologies and innovative storage solutions represents a significant advancement in post-harvest treatment. Smart packaging incorporates features such as temperature control, humidity monitoring, and gas

regulation to extend the shelf life of agricultural products. These technologies minimize post-harvest losses and enhance the overall quality of produce during storage and transportation. Cold chain management is a critical aspect of post-harvest technologies, particularly in the preservation of perishable goods. Advances in refrigeration, transportation, and cold storage technologies contribute to the development of efficient cold chains. This ensures that temperature-sensitive products, such as fruits and vegetables, are maintained at optimal conditions throughout the supply chain, reducing spoilage and preserving nutritional value.

A notable trend in post-harvest technologies involves the development and adoption of bio-based preservatives. As sustainability gains prominence, there is a shift towards eco-friendly treatments that minimize environmental impact. Bio-based preservatives, derived from natural sources, offer effective alternatives to traditional chemical treatments, aligning with consumer preferences for sustainable and environmentally responsible practices. Automation and robotics play a significant role in post-harvest processing, offering solutions for tasks such as sorting, grading, and packaging. The integration of robotic systems enhances the speed and accuracy of post-harvest operations, reducing labor costs and improving overall efficiency. These technological advancements contribute to streamlined processes and increased productivity in the post-harvest phase.

Globalization of Food Supply Chains

The globalization of food supply chains has led to a substantial increase in cross-border trade of agricultural products. As products traverse international boundaries, they encounter diverse climates, transportation conditions, and regulatory frameworks. Post-harvest treatments become essential in ensuring that agricultural produce remains viable and compliant with international standards throughout this intricate journey, thereby facilitating the expansion of cross-border trade.

International markets often demand adherence to stringent quality standards. Post-harvest treatments play a crucial role in standardizing the quality of agricultural products for export. To meet the requirements of diverse markets and regulatory frameworks, stakeholders must implement effective treatments that address specific challenges related to pests, diseases, and storage conditions. Standardization becomes a key driver for the adoption of advanced post-harvest treatment practices. The globalization of food supply chains exposes them to a myriad of risks, including logistical challenges, geopolitical uncertainties, and environmental factors. Post-harvest treatments contribute to supply chain resilience by mitigating risks associated with spoilage, contamination,

and losses during transportation. As stakeholders seek to navigate the complexities of global supply chains, the role of effective post-harvest treatments in risk management becomes increasingly pronounced.

Access to international markets is contingent upon meeting the quality and safety expectations of diverse consumers. Post-harvest treatments enhance the competitiveness of agricultural products by ensuring they meet or exceed international standards. As markets become more competitive, stakeholders are driven to invest in advanced treatment methods to differentiate their products and gain a competitive edge in the global marketplace. The globalization of food supply chains brings with it the influence of global consumer preferences and trends. Consumers worldwide are increasingly demanding high-quality, safe, and sustainably produced food. Post-harvest treatments that address these concerns, such as eco-friendly preservatives and smart packaging, align with evolving consumer expectations. Stakeholders adapt their post-harvest strategies to meet these global trends and cater to a discerning and diverse consumer base.

Key Market Challenges

Regulatory Compliance and Harmonization

The diversity of international regulations governing post-harvest treatments poses a substantial challenge for businesses operating across borders. Harmonizing treatment practices to align with varied regulatory frameworks demands significant efforts in research, development, and adaptation.

The lack of standardized regulations can lead to increased compliance costs and complexities. Businesses may face delays in market entry due to the need for regulatory approvals in multiple regions. Achieving harmonization is an ongoing challenge, hindering the seamless global adoption of post-harvest treatments.

Consumer Perception and Acceptance

Consumer perceptions and acceptance of post-harvest treatments, especially chemical-based solutions, pose a significant hurdle. Negative perceptions regarding residues, environmental impact, or health concerns can influence consumer choices and affect market demand.

Reluctance among consumers to embrace treated products may limit market growth.

Despite the benefits of post-harvest treatments in preserving quality and safety, overcoming consumer skepticism and fostering awareness about the necessity and safety of these treatments is a persistent challenge.

Technological Adoption and Accessibility

The effective adoption of advanced post-harvest technologies, such as precision agriculture methods and smart packaging, requires substantial investments. Small and medium-sized enterprises (SMEs), in particular, may face challenges in accessing and implementing these technologies due to financial constraints or limited technical expertise.

Uneven technological adoption across the industry can create disparities in efficiency and competitiveness. Smaller players may struggle to keep pace with larger counterparts, potentially limiting their market share. Bridging the technological gap and ensuring accessibility to innovative solutions is essential for comprehensive market growth.

Key Market Trends

Rise of Sustainable and Eco-Friendly Solutions

There is a growing emphasis on sustainability within the post-harvest treatment market, driven by consumer demand for eco-friendly practices. This trend is manifested in the development and adoption of sustainable solutions, including bio-based preservatives, organic treatments, and environmentally conscious packaging materials.

Companies prioritizing sustainability align with global efforts to reduce the environmental impact of agriculture. Sustainable post-harvest treatments not only appeal to eco-conscious consumers but also position businesses favorably in markets where sustainable practices are becoming a decisive factor in purchasing decisions.

Integration of Digital Technologies and Data Analytics

Digital technologies, such as IoT (Internet of Things), blockchain, and data analytics, are increasingly integrated into post-harvest treatment processes. These technologies enable real-time monitoring of storage conditions, traceability of products throughout the supply chain, and data-driven decision-making for optimized treatment strategies.

The adoption of digital technologies enhances transparency, efficiency, and traceability in post-harvest operations. Data analytics provide valuable insights into supply chain dynamics, allowing stakeholders to make informed decisions, reduce losses, and improve overall process efficiency.

Focus on Precision Post-Harvest Treatments

Precision agriculture principles are extending into post-harvest treatments, emphasizing targeted and efficient application methods. This trend involves the use of drones, sensors, and automated systems for precise and controlled delivery of treatments, reducing wastage and optimizing the effectiveness of post-harvest interventions.

Precision post-harvest treatments contribute to resource efficiency, cost-effectiveness, and reduced environmental impact. By minimizing overuse of chemicals and optimizing application methods, stakeholders can achieve better outcomes in terms of pest control, disease prevention, and overall product quality.

Segmental Insights

Type Insights

Based on the category of Type, the Coating segment emerged as the dominant player in the global market for Post-Harvesting Treatment in 2022. Coatings are applied to fruits and vegetables during the packaging process to extend their shelf life and reduce quality and quantity losses. The introduction of coatings has made it easier to preserve the product's softness, color, odor, and flavor.

The global demand for fresh fruits and vegetables is increasing due to rising awareness of the health benefits of consuming fresh produce. This is driving the demand for post-harvesting treatment solutions, such as coatings, which can help to extend the shelf life of fresh produce. Food safety regulations are becoming increasingly stringent around the world. This is leading to an increased focus on post-harvesting treatment solutions that can help to prevent foodborne illness. There have been significant technological advancements in the field of coatings in recent years. This has led to the development of new and innovative coatings that are more effective and durable. These factors are expected to drive the growth of this segment.

Crop Type

Based on the category of Crop, the Fruits segment emerged as the dominant player in the global market for Post-Harvesting Treatment in 2022. Fruits are highly perishable products, and post-harvesting treatment solutions can help to extend their shelf life and reduce quality and quantity losses.

The global demand for fresh fruits is increasing due to rising awareness of the health benefits of consuming fresh produce. This is driving the demand for post-harvesting treatment solutions for fruits. Fruits are highly perishable products and can lose their quality and quantity quickly after harvest. Post-harvesting treatment solutions can help to extend the shelf life of fruits and reduce these losses. There is a wide range of post-harvesting treatment solutions available for fruits, including coatings, ethylene blockers, cleaners, fungicides, sprout inhibitors, and sanitizers. This gives farmers and other stakeholders in the food supply chain a variety of options to choose from, depending on their specific needs. These factors are expected to drive the growth of this segment.

Origin Insights

The Synthetic segment is projected to experience rapid growth during the forecast period. Synthetic post-harvesting treatments are typically more effective and durable than natural treatments, and they are also more affordable.

The global demand for convenience foods is increasing. Convenience foods are often processed and have a long shelf life. This is driving the demand for synthetic post-harvesting treatments, as they are more effective at preserving the quality and safety of processed foods than natural treatments. Food safety regulations are becoming increasingly stringent around the world. This is leading to an increased focus on synthetic post-harvesting treatments, as they are more effective at preventing foodborne illness than natural treatments. There have been significant technological advancements in the field of synthetic post-harvesting treatments in recent years. This has led to the development of new and innovative synthetic treatments that are more effective and durable. These factors collectively contribute to the growth of this segment.

Regional Insights

Asia-Pacific emerged as the dominant player in the global Post-Harvesting Treatment market in 2022, holding the largest market share in terms of value. The Asia Pacific region is home to a large and growing population with a rising disposable income, which is leading to an increased demand for fresh produce. This increased demand is putting

pressure on food producers to minimize post-harvest losses and extend the shelf life of their products. Food producers in the Asia Pacific region are increasingly adopting post-harvest technologies to improve the quality and shelf life of their products. This is being driven by advancements in technology and a growing awareness of the benefits of post-harvest treatment. Governments in the Asia Pacific region is providing support to the post-harvest treatment industry through various initiatives, such as subsidies and tax breaks. This support is helping to encourage the adoption of post-harvest technologies and is contributing to the growth of the market.

The MEA market is poised to be the fastest-growing market, offering lucrative growth opportunities for Post-Harvesting Treatment players during the forecast period. Factors such The MEA region is experiencing rapid urbanization, which is leading to a growing demand for fresh produce in urban areas. This demand is putting pressure on food producers to improve their post-harvest practices. Governments and private investors in the MEA region are investing in post-harvest infrastructure, such as cold storage facilities and transportation networks. This investment is helping to reduce post-harvest losses and is creating new opportunities for the post-harvest treatment industry. Consumers in the MEA region is becoming increasingly aware of the importance of food safety. This is driving demand for post-harvest treatments that can help to prevent foodborne illnesses.

Key Market Players

Syngenta Crop Protection AG

Nufarm Ltd.

Agrofresh Inc.

Bayer AG

BASF SE

Citrosol SA

Hazel Technologies Inc.

Lytone Enterprises Inc.

Shandong Aoweite Biotechnology Co. Ltd.

Fine Chemicals Inc.

Report Scope:

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

Post-Harvesting Treatment Market, By Type:

Coating

Ethylene Blockers

Cleaners

Fungicides

Sprout Inhibitors

Sanitizers

Other

Post-Harvesting Treatment Market, By Crop Type:

Fruits

Vegetables

Flowers & Ornamentals

Post-Harvesting Treatment Market, By Origin:

Natural

Synthetic

Post-Harvesting 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

Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Post-Harvesting Treatment Market.

Available Customizations:

Global Post-Harvesting 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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