

## **Crop Protection Chemicals Market - Growth, Trends, and Forecast (2023 - 2028)**

Market Report | 2023-01-23 | 155 pages | Mordor Intelligence

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### **Report description:**

The crop protection chemicals market is projected to register a CAGR of 4.2% during the forecast period.

#### Key Highlights

Crop protection products are used to decrease crop output losses caused by pests and diseases and maintain healthy crops. These are mainly classified into pesticides, insecticides, and herbicides and can be formed by both synthetic and biological compounds. Currently, numerous pesticides are available to prevent crops from being harmed by pests such as bacteria, rodents, insects, and birds. For instance, according to the Royal Society of chemicals, around 800 chemically active compounds are reportedly approved for crop protection treatments globally.

The crop protection chemical industry has been transforming over the years, with robust growth and changing crop mix trends and environmental regulations. Over the long term, growing population, declining arable land, food security, and the need for augmented agricultural productivity are the significant factors driving the demand for higher agricultural output, thus boosting the growth of the crop protection industry globally. Moreover, the increased organic farming across the globe is also anticipated to drive the market for bio-based pesticides during the forecast period. On the other hand, bans and government regulations toward the use of pesticides in certain regions and high input costs are the major factors restraining market growth.

#### Crop Protection Chemicals Market Trends

##### Increased area under organic farmland

The global organic food industry has recorded exponential double-digit growth rates in response to the growing need to meet food sufficiency and the importance of safe farming practices. Over the last three decades, organic food and farming have continued to grow across the globe. Since biopesticides are chemical-free, they are used on a large scale in organic farming. Hence, the market demand for biopesticides is increasing with the growing popularity of organic food and beverage products globally.

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Biopesticides are emerging as a lucrative replacement for synthetic pesticides in regions such as Europe due to the increasingly stringent regulations on chemical use and chemical residue limit. In June 2022, the European Union's executive arm proposed setting legally binding targets to reduce the use of chemical pesticides by 50% by 2030. Similarly, On May 20, 2020, the European Commission proposed a plan to reduce 505 chemical pesticide uses and increase the percentage of organic farming. To achieve these goals, the EU claimed that it would strengthen the risk assessment of pesticides, facilitate biopesticide approvals and improve the approval process by member states. Several European countries have initiated programs to promote the use of Biopesticides. Bio-based agrochemical products not only improve yield but also positively affect harvest grade and sizing in specialty crops, along with shelf life and nutritional quality are gaining interest. Additionally, the lower residual toxicity levels of biopesticides against synthetic crop protection chemicals make them ideal inputs to be used in organic agriculture, owing to the escalating demand for soil and environmental safety, food safety, and quality. Additionally, the relatively low R&D Costs associated with bio-based agrochemicals account for the market's growth.

The increasing demand for organic products has resulted in farmers turning their farmlands towards organic cultivation practices, which require biopesticides. Therefore, a rapid adoption rate of organic farming has boosted the demand for and production of biopesticides.

### Asia-Pacific Dominates the Global Market

Asia-Pacific is the major consumer of crop protection chemical products, owing to its large agricultural base. China, Japan, India, and Australia accounted for more than 80.0% share of the crop protection chemicals market in Asia-Pacific in 2020. For instance, according to the Ministry of Chemicals & Fertilizers, in the fiscal year 2021, the pesticide production volume in India amounted to 255 thousand metric tons across India, with an increase of 63 thousand metric tons compared to 2020 with 192 thousand metric tons. However, with rising awareness regarding the impact of chemical insecticides on the health of humans, the gradual shift toward the usage of eco-friendly, natural insecticides and bioinsecticides by farmers has been observed in the region. Therefore, biopesticide growth has impacted the synthetic insecticides market, particularly in developing countries like India and China. The growth in China is driven by an increasing emphasis on the importance of organic products among the younger generation and a rise in demand for organic baby food due to the growing number of mothers in the workforce and the increasing adoption of the health and wellness trend.

In India, synthetic pesticides have been extensively used to alleviate crop loss due to the high incidence of pests and diseases. Major factors driving the Indian crop protection chemicals market include higher demand for food grains, limited availability of arable land, elevating exports, growth in horticulture and floriculture, and increasing public awareness regarding pesticides and biopesticides. However, in Japan, companies are highly focused on conducting R&D activities, which is the backbone of introducing new and advanced pesticide products, boosting the demand for the crop protection chemicals market in Asia. Moreover, the Japanese government has come up with various policies concerning the protection of soil, water, biodiversity, rural landscape, and food security to create a sustainable farming environment in the region. Hence, Asia-Pacific has many opportunities for market players regarding both conventional and biopesticides.

### Crop Protection Chemicals Market Competitor Analysis

The crop protection chemical market is highly consolidated, with major players accounting for the major share of the market. Bayer Crop Science, Syngenta International AG, BASF SE, Corteva AgriScience, and Sumitomo Chemical Co. Ltd are the leading players in the market. New product launches, mergers and acquisitions, and partnerships are the major strategies the leading companies adopt. These companies also focus on investing in innovations, collaborations, and expansions to increase their market share.

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