SCOTTS INTERNATIONAL

Africa Agrochemicals Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The African agrochemicals market is projected to register a CAGR of 4.6% during the forecast period 2022-2027.

The ongoing COVID-19 pandemic compelled companies to rethink their strategies in the process of manufacturing agrochemical products. However, decreased manufacturing capacity, restrictions and logistic disruptions, imbalance in demand and supply, and the threat of new outbreaks and lockdowns impacted the industry in the country.

A trend of increased pesticide usage in the region was observed during drought conditions to control pests such as aphids, compared to seasons with normal rainfall patterns. Farmers tend to use higher amounts of pesticides against climate variability to continue and maintain production. Farmers in the region lack access to agricultural inputs such as fertilizers, pesticides, fungicides, etc., for crop production. However, the government is pushing the agricultural section through various initiatives. For instance, a featured element of the Angolan government's National Development Plan for 2018-2022 includes agricultural development to diversify the economy and build domestic food production capacity that will decrease the country's dependence on imported food. This focus on domestic production would essentially also create demand for agrochemicals.? Further, several hectares of farmland were adversely affected by worms in countries like Zimbabwe and Namibia. For instance, in 2020, the Ministry of Agriculture in Namibia issued a public notice to farmers about the fall armyworm outbreak that hit the Zambezi region. The outbreak in 2019 had a devastating effect on regional agriculture. The ministry also cautioned against the threat of African armyworms in the Oshana, Oshikoto, and Omusati regions.? Due to the growing demand for food safety and quality, biopesticides are also gaining increasing popularity over their synthetic counterparts.? Therefore, the increasing concern over food production, coupled with the emergence of new pests and diseases due to erratic climatic conditions, is expected to boost the usage of agrochemicals. That is likely to reflect a positive trend for the market during the forecast period.

Africa Agrochemicals Market Trends

Growing Food Demand Due to High Population Growth

African smallholder farmers produce 80% of the continent's food. With growing pressure on them to produce more, farmers are increasingly using pesticides and other agrochemicals to feed the growing population on the continent. The food consumption rate in Africa is rising almost ten times faster than the local production. The demand for food is growing in most African countries, despite the slowdown induced by the decline in commodity prices. Africa's urban population and incomes are growing, in turn, boosting demand in the cities.

Africa's demand for food is projected to more than double by 2050, driven by population growth, rising incomes, rapid urbanization, and changes in regional diets toward greater consumption of higher-value fresh and processed foods. That, in turn, is creating new opportunities for Africa's farmers and propelling the growth of pesticides in agriculture. Many initiatives are coming up to address the food security issue in the region, including the G8's New Alliance for Food Security and Nutrition in Africa and the Alliance for a Green Revolution in Africa (AGRA). The increasing need for food security within an expanding population and greater demand from a rising middle class for food variety are necessitating the need for boosting crop yields, thus, driving the demand for agrochemicals among African farmers. Many African governments have put agriculture on the top of their development agenda. National budgets for the sector are increasing, and private companies have started investing in Africa's agriculture value chains. This agricultural transformation process gaining momentum can boost the agricultural inputs market. The agrochemicals market can potentially gain from this trend.

Fertilizer Segment Dominates the Market

The African population increased by 1.2% in 2020. This increasing population demands increased food production to feed the population, which in turn increases agriculture production. The percentage of agricultural land to the total land in the country was constant for 2017 and 2018. Agricultural land decreased by 0.11% in 2019. To increase productivity from the limited land, the efficient use of inputs is mandatory, driving the fertilizers market in the country as fertilizers are an important input in crop production. According to the FAO, NPK fertilizer agricultural use increased by 3.02% in 2018-2019. Nitrogen was the most used fertilizer in 2019, accounting for 417 thousand ton. Nitrogen fertilizers are the most consumed fertilizer in Africa. According to the International Fertilizers Association, the total NPK consumption in 2019 accounted for 6,605 thousand ton. However, usage remains well below the global average and significantly beneath the targets set by regional governments and intergovernmental organizations, despite recent growth in both sales and production.

According to the Africa Fertilizers Organization report, a total of 14 fertilizer manufacturing plants were mapped in 2020. There were 151 fertilizer plants in Africa in 2020, including 87 processing plants, 15 organic plants, and 35 new facilities apart from the manufacturing plants. Malawi accounts for only two fertilizer processing plants, and Zambia has four, whereas Mozambique possesses five processing plants, with one being established during the historic period in 2020. However, Congo does not possess any fertilizer plants in the country. Though there has been a decline in consumption and sales in 2018, with the increased crop production, the fertilizer market has grown and is anticipated to grow further, with an increased preference for organic fertilizers for sustainable development.

Africa Agrochemicals Market Competitor Analysis

The African agrochemicals market is a fairly consolidated market, and the major players accounted for a significant share in 2021. In terms of market share, Sasol Limited, Yara International, and BASF SE are some of the key players dominating the market.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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