

## **Nematicides Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)**

Market Report | 2023-01-23 | 188 pages | Mordor Intelligence

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### **Report description:**

The Nematicides Market is projected to register a CAGR of 5.8% during the forecast period (2022-2027).

The COVID-19 pandemic had a significant impact on the nematicides market. The imposition of lockdown restrictions around the world resulted in supply chain disruptions, which in turn disturbed the stakeholders involved in the supply of products to the destined locations. Factors such as shortage of labor and limited supply of raw materials due to restriction of movements have led to a decrease in production efficiency.

During the study period, it was found that although the advent of bio-based nematicides is registering a high growth rate in terms of development and adoption, the chemical nematicides segment still occupies the largest share in the overall market. The rate of application of halogen compounds and other fumigants outpaces that of organophosphate and carbamate, as soil fumigation is intensively practiced for controlling root-knot nematodes in vegetable crops across the world. However, liquid nematicides that are non-fumigant in nature are being increasingly adopted by farmers as a result of the rising concerns about the effects on the environment and human health. Fluensulfone, a recently developed active ingredient, reportedly decreased potato cyst nematode infection by 43% and increased potato yield by 62% in the United States, as revealed by a study conducted in 2019. North America was the largest region for registered nematicide use in 2021. Several agricultural service companies have also been trying to capitalize on the emerging demand for bio-nematicides in South America through extensive R&D activities. For instance, in 2019, Corteva Agriscience and Stoller planned to distribute their bionematicide products for sugarcane. In Europe, multiple nematodes (roundworms), such as root-knot, cyst, sting, and lance, prevalent on a wide range of crops grown organically in the region, are further expected to push the demand for nematicides in the coming years. Therefore, the increase in demand for bio-based nematicides globally and the increasing infestation of nematodes in the crops is anticipated to drive the market during the forecast period.

Nematicides Market Trends

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## Increasing Demand for Bio-based Nematicides

Although synthetic or chemical nematicides continue to witness a positive trajectory in demand. Emerging preference for biological nematicides has also been observed in recent years, primarily due to the rapid adoption of integrated pest management (IPM) techniques and sustainable agricultural practices globally. Empirical observations have revealed that bio-nematicides act synergistically with other agricultural inputs as an important component under environment-friendly IPM programs. For instance, as per an article published in the Journal of the International Organization for Biological Control in 2017, there had been numerous developments in the commercialization of bio-nematicides in the United States in the past few years. Extensive research has been conducted in developing *Pasteuria* spp. and *Purpureocillium lilacinus* as potential nematicides. In developing countries like India, the usage of bio-nematicides is growing in recent years. For instance, under the scheme Strengthening & Modernization of Pest Management Approach (SMPMA), the overall use of bio-pesticides, including bio-nematicides, in India increased from 123.0 metric tons from 1994 to 1995 to 7,682.0 metric tons during 2018-2019. Integrated pest management has been a compulsory regulation in the European Union as part of its strategy toward achieving sustainability in agriculture and reduction of pesticide risks. The area under organic farmland in Europe rose drastically from 13.4 million hectares in 2018 to 14.7 million hectares in 2020. Several agricultural service companies have also been trying to capitalize on the emerging demand for bio-nematicides through extensive Research and Development (R&D) activities. For instance, in 2019, Marrone Bio Innovations revealed the results of trials conducted for its *Burkholderia rinojensis*-based product, which resulted in higher yields and cost-effective control of nematodes when compared to its proprietary bio-nematicide, Majestene. Therefore, the increasing demand for biological nematicides is anticipated to drive the overall nematicide market during the forecast period.

## North America Dominates the Global Market

Due to the presence of various nematode species attacking a wide range of economically important crops, as well as awareness of farmers regarding the application of chemical nematicides, the region has garnered the highest market share. In 2018, by chemical type, the fumigants segment dominated the market. Soil fumigation is the most widely accepted practice for crop treatment against nematodes. In North America, *Meloidogyne*, *Heterodera*, *Tylenchulus*, *Rotylenchulus*, and *Prototylenchulus* are the common agricultural pest nematodes. Due to their high volatility, chemical fumigants are used in enclosed spaces, like greenhouses, warehouses, etc. In terms of crops, vegetables, corn, and cotton are majorly affected by nematodes in the United States. The most common nematode species affecting cotton in the United States are southern root-knot (*Meloidogyne incognita*), reniform (*Rotylenchulus reniformis*), Columbia lance (*Hoplolaimus columbus*), and sting (*Belonolaimus longicaudatus*). Velum Prime is one of the largest nematicide brands sold in Canada. Players in the market are bringing up new technological solutions for agriculture use. For instance, Bayer's Velum prime was positioned as the first non-fumigant nematicide for potatoes with a secondary benefit of fungicidal activity on early blight in 2017. As per the Environmental Protection Agency (EPA), the product is registered for application in 6-12-inch rosette stag via overhead chemigation. The increase in the number of nematicide products based on the aforementioned nematodes is estimated to drive the market during the forecast period.

## Nematicides Market Competitor Analysis

The Nematicides Market is a consolidated market, with the major players occupying a large share. The major players are American Vanguard Corporation, Bayer AG, Syngenta International AG, Corteva Agriscience, and UPL Limited in the market. The other prominent players active in the nematicides market include Sumitomo Chemical Co. Ltd, Nufarm Ltd, ADAMA LTD, and Marrone Bio Innovations Inc. These major players are investing in new products and improvisation of products, expansions, and acquisitions for business expansions. Another major area of investment is the focus on R&D to launch new products at lower prices.

## Additional Benefits:

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