

Agricultural Fumigants Market - Growth, Trends, Covid-19 Impact, and Forecasts (2023 - 2028)

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Report description:

The agricultural fumigants market is projected to record a CAGR of 5.6% during the forecast period 2022-2027.

The COVID-19 pandemic disrupted the operations of the crop protection chemicals market, including fumigants. The pandemic affected supply chain networks, resulting in losses for companies and farmers. In terms of supply, a short-term shortage of migrant laborers amid distribution bottlenecks created a wide gap between the number of workers required for production. Some other restraints included customs clearances, export permits, import permits, and phytosanitary certificates.

The agricultural fumigants market is driven by factors, like rapid technological advancements in the agricultural sector, growing concerns over post-harvest losses, and a shift in the advanced farming practices, which have led to increased yields. The use of fumigants during storage helps in the reduction of storage loss. Thus, the demand for fumigants is expected to increase as the use of fumigants is an effective and economical method to reduce post-harvest losses.

A widely used fumigant for storing agricultural commodities while offering protection against insects and rodents, phosphine-based fumigants have emerged as the largest segment among all types of global fumigants. North America dominates the market. With rapid investments in technology and R&D, many new varieties of products are being developed with less toxicity and more efficiency. The growth of the agricultural fumigants market can be attributed to several factors, such as the increased inclination of consumers for improving the quality of agricultural output, changing farming practices, and advanced storage technology. However, fumigants cause several problems, including possible phytotoxicity, depending on the type of crop and its variety, seasonal conditions, humidity, temperature, fumigant concentration, and duration of treatment. Therefore, it is recommended to be used by professional fumigators only due to its high toxicity as a respiratory poison.

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Agricultural Fumigants Market Trends

Growing Agricultural Production

In line with increasing agricultural production, the demand for fumigants has been witnessing an upward trend over the years. The use of fumigation has increased at all levels of the grain and oilseeds supply chain, emerging as the main insect management option at the farm level. For farm-level storage and in silos, fumigation is among the most preferred methods to prevent the build-up of insect infestations while avoiding pest resistance. However, the available active substances are constrained to a limited number of fumigants and storage insecticides due to legislative restrictions. Methyl bromide (MB) fumigation is an effective treatment to ensure that products pose a minimal phytosanitary risk. While the European Union has banned the use of MB, Canada still requires it as the only approved treatment for the quarantine and pre-shipment applications of some products.

The Food and Agriculture Organization (FAO) of the United Nations has predicted that agricultural productivity is likely to increase by 70% by 2050 in order to meet the growing demand for food. The demand for agricultural crops is expected to rise to around 6,759 million ton by 2050. Global cereal production increased from 2906.5 million ton in 2018 to 2996.1 million ton in 2020. Thus, the demand for agricultural warehouses, storage technologies, and associated products, like fumigants, is anticipated to grow in the long run. In warehouses, pests damage most crops, and the use of fumigants decrease the loss of agricultural products. Therefore, this is expected to boost demand for the agricultural fumigants market across the world.

North America Leading the Global Market

North America is the largest market for agricultural fumigants, with over 250 authorized products available in its major countries. Management of stored product insects is a major concern and widely researched topic in the food and grain processing and storage industry.

The major commodities consuming fumigants for both storage and soil applications in the region are corn, rice, barley, potato, tomato, wheat, strawberry, cabbage, etc. In North America, the United States is the largest market, accounting for more than half of the regional market's share. The major fumigants in the US market include chloropicrin, sulfuryl fluoride, aluminum phosphide, ethylene oxide, etc. Over 90 fumigant-based products are registered in Canada, manufactured by 25 companies. A few key players are AMVAC Chemicals, Degesch America Inc., Syngenta Canada Inc., United Phosphorus Inc., etc.

Agricultural Fumigants Market Competitor Analysis

The global agricultural fumigants market is consolidated, with a few companies occupying the largest market share. The markets in North America and Europe are highly consolidated, with a few major players occupying large market shares and having a high level of competition. Diversification of portfolios through R&D, which is the backbone of the introduction of new products, is one of the prominent strategies being applied to the matured markets for further intensification.

Additional Benefits:

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

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