

United States Crop Protection Chemicals Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The United States crop protection chemicals market is projected to register a CAGR of 3.9% over the forecast period.

The growing demand for food constantly increases the need for agricultural productivity, which accelerates the demand and need for crop protection chemicals. The improved scientific and technological trends in the crop protection chemicals market are likely to be major factors positively impacting the market during the forecast period.

According to the US Department of Agriculture (USDA) report in the year 2020, soybean recorded the highest rate of fertilizer and pesticide usage as well as pest management practices for higher production. NASS surveyed the 19 states that accounted for 96.32% of the 83.08 million acres planted with soybeans in the United States in 2020. These 19 states included Arkansas, Illinois, Indiana, Iowa, Kansas, Kentucky, Louisiana, Michigan, and Minnesota. Herbicides were used most extensively and were applied to 98% of planted acres. Fungicides were applied to 22% of planted acres, and insecticides were applied to 20% of the same.

Based on origin, the synthetic segment occupies the largest share; however, bio-based is rapidly evolving owing to concerns over the impact of synthetic chemical residues. In 2021, farmers in Minnesota primarily use neonicotinoids and chlorpyrifos as insecticides. However, due to growing concerns about the harmful effects of synthetic insecticides, the state government restricted the use of neonicotinoids, primarily to ensure permissible use of the bee-harming insecticide.

US Crop Protection Chemicals Market Trends

Increased Focus Toward Sustainable Crop Production

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Growing concerns about personal health have led consumers to invest in organic products. The health implications associated with organic foods have become more important than ever as people have become extremely concerned about overall wellness. With the growing demand for food safety and quality, biopesticides are gaining increasing popularity in sustainable agriculture. The biopesticide sector has been driven by a growing awareness of sustainable food production, farmers' concerns about excessive chemical usage, and the rising expense of chemical crop protection.

According to the US Environmental Protection Agency (EPA), seven new active ingredients under biopesticides were registered in the United States at the end of 2020. The large number of microbial pesticides registered in the country indicates a huge demand for these products. Biopesticides tend to pose fewer risks than chemical pesticides, and the leading players in the market are focused on providing sustainable solutions. For instance, in 2021, FMC Corporation partnered with Novozymes, the world leader in biological solutions, to research, co-develop, and commercialize biological enzyme-based crop protection solutions for growers across the world. This partnership has been focused on developing enzyme-based biocontrol technology for the United States and global fungicide and insecticide markets.

Therefore, due to a surge in health consciousness and an interest in sustainable crop production, the demand for biopesticides is expected to rise during the forecast period, in turn aiding the crop protection chemicals market.

Herbicides Dominate the Market

The herbicides segment continues to dominate the US crop protection chemicals market. The adoption rate of herbicides has been growing in the past few years in the country, owing to the lower prices and availability of different types of herbicides as compared to other crop protection chemicals. The growth of herbicides is driven significantly by the increment in hard-to-control and resistant weeds that are likely to infest more than 80 million acres of farmland.

Glyphosate, 2,4-D, atrazine, glufosinate-ammonium, paraquat, pendimethalin, dicamba, fluroxypyr, and metolachlor are the commonly used synthetic herbicides. However, glyphosate is the primary driver of market growth. Glyphosate, sold under the brand name Roundup by Bayer, is the most widely used herbicide. It is a broad-spectrum, non-selective, systemic herbicide that accounts for 60% of the global market for non-selective herbicides.

The Agricultural Chemical Use Program of USDA's National Agricultural Statistics Service (NASS) conducted a survey in 19 states that accounted for 92.1% of the 93.4 million acres of land planted with corn in the United States in 2021, in which atrazine was the most widely used active ingredient (applied to 65% of planted acres), followed by mesotrione (47%) and glyphosate isopropylamine salt (41%).

Thus, the growing need to increase crop yield and quality, control crop yield losses due to weeds, the rising demand for organic food, and stringent government regulations toward chemical herbicides in the country are the major factors driving the herbicides market, especially bioherbicides.

US Crop Protection Chemicals Market Competitor Analysis

The US crop protection chemicals market is highly consolidated, with major players occupying large market shares and competing fiercely with local players and private labels. The major players in the market include Bayer AG, BASF SE, Syngenta AG, Corteva Agriscience LLC, and FMC Corporation.

These prominent players in the market have extended their product portfolio and broadened their businesses to maintain their positions in the market. In addition, these players are strengthening their position through partnerships and expanding their operations in the US market.

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