

Brazil Crop Protection Chemical Market - Growth, Trends, and Forecasts (2023 - 2028)

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Report description:

The Brazilian crop protection chemical market is expected to register a CAGR of 6.9% over the forecast period.

Key Highlights

Brazil is one of the world's leading countries in agricultural productivity and production. Brazil has the largest and one of the fastest-growing markets for crop protection chemicals among the South American countries. It has developed from a net food importer to a major exporter, mostly by improving productivity through technology adoption and crop protection chemicals. Crop protection chemicals are widely utilized in Brazil's agriculture as an effective and economical solution to enhance crop yield by protecting crops from harmful pests and weeds, and this ensures food security for the growing populations in Brazil. According to the Food and Agriculture Organization (FAO), Brazil is the major consumer of these protection products. One of the primary causes of rising crop yields in this country is the widespread use of pesticides.

In Brazil, the crop protection chemical industry has been transforming over the years, with robust growth coupled with changing crop mix trends and environmental regulations. Growing population, declining arable land, food security, and the need for increased agricultural productivity are the major factors driving the demand for increased agricultural output, thereby boosting crop protection industry growth.

Furthermore, several key players are registering new crop protection products, which are fueling the market over the forecast period. For instance, in May 2022, Sumitomo Chemical received registration approval in Brazil for its soybean fungicide EXCALIA MAX, which contains the novel active ingredient INDIFLIN.

Brazil Crop Protection Chemical Market Trends

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Decrease in Per Capita Arable Land

With the increasing per capita income and growing population in the country, the demand for food is also estimated to grow. Many factors, including climate change, pest outbreaks, a lack of investment, and limited agricultural land, make it difficult to produce enough food to ensure food security.

Due to the increasing population, Brazil's food production needs to increase to meet the growing food demand in the country. Hence, to meet the increasing food demand in the country, the production of crops, such as cereals and pulses, needs to increase despite the limited availability of arable land.

According to the World Bank, the per capita arable land area in Brazil has decreased from 0.27 hectares in 2017 to 0.26 hectares in 2020. At the same time, the Brazilian population is expected to reach 228.9 million by 2050. This implies that the demand for food per capita is increasing and the area for food production per capita is decreasing considerably. Thus, crop protection chemicals are critical for increasing yields and meeting food demand.

Farmers are focusing on increasing production by reducing the damage caused by pests with proper pest management and the use of crop protection products, such as insecticides, fungicides, and nematicides. As a result, the market for crop protection chemicals is expected to grow in the country.

Furthermore, commodities like cotton, which are of great importance to Brazil's economy, Brazil is the second largest exporter of cotton, but the constantly decreasing arable land can be a threat to its rank as a top exporter. For this reason, several players are launching crop protection products to increase yields. For instance, in September 2022, BASF launched Belyan fungicide in Brazil. The product is recognized for the control of cotton diseases, including ramularia, which is considered the main one.

Increasing Area Under Organic Farming

People's growing concerns about the food products they consume, as well as the effects those products have on their health and the environment, are pushing market players to shift from synthetic to bio-based chemicals.

Farmers using bio-based chemicals in their agricultural produce lessen the chances of toxicity in the food chain. Additionally, simple residue management techniques and low R&D investments in developing new bio-based chemicals are driving the bio-based sub-segment of the market.

Furthermore, in response to the growing need to meet food sufficiency and the importance of safe farming practices, the Brazilian organic food industry has recorded exponential double-digit growth rates. Over the past few years, organic food and farming have continued to grow across the country. For instance, the organic farming area in Brazil in 2017 was 1,136,857 hectares, which increased by 16.1% and reached 1,319,454 hectares in 2020. Since bio-based crop protection chemicals are used on a large scale in organic farming, Hence, the market demand for bio-based crop protection chemicals is increasing with the growing popularity of organic food and beverage products across the country.

Furthermore, due to increasingly stringent regulations on the use of synthetic origin crop protection chemicals in the region, bio-based is emerging as a profitable replacement for synthetic origin crop protection chemicals. The country's government has taken initiatives to promote the use of biopesticides. For instance, in April 2022, Brazil's Ministry of Agriculture published the registration of two new biological pesticides. One is based on garlic extract, which can be used to control nematodes (pests of small soil worms that attack plant roots), and the other is a mite that controls whitefly, a pest that attacks potatoes, tomatoes, and beans, among other crops.

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Brazil Crop Protection Chemical Market Competitor Analysis

The Brazil Crop Protection Chemicals Market is a highly consolidated market with few major players such as Bayer CropScience, BASF SE, Syngenta AG, UPL, and Corteva agriscience. These major players are strengthening their presence across the country through various activities such as mergers & acquisitions, expansion of their production units, warehouses, and distribution channels, investment in R&D, and new product developments.

Additional Benefits:

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

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