

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

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Report description:

The Indonesian crop protection chemicals market is projected to register a CAGR of 4.1% during the forecast period.

Key Highlights

The main factor responsible for the growth of the crop protection chemicals market in Indonesia is an increase in demand due to high population growth, growing domestic demand for food safety and quality, and the adoption of new farming practices. The prevalence of the application of chemical- or synthetic-based agrochemicals on agricultural land is expected to continue. Insecticides are the main product used in the country, which occupies a 43.5% share of the market.

The majority of the farmers in the country are small-scale operators with areas of less than 2 hectares. Most of these small-holding farmers receive subsidies from the government. The government's goals in offering fertilizer subsidies are to boost farmers' income, provide reasonably priced fertilizers, and increase output per hectare.

The Indonesian government has developed a national policy declaring that the main source of food for consumption should be domestic production to ensure sustainable food production and nutrition security. As a result, it is supplying farmers with fertilizers at discounted prices. Due to farmers' encouragement to use fertilizers heavily and increase production, the market has grown rapidly.

Indonesia Crop Protection Chemicals Market Trends

Increasing Food Demand and Need For Increasing Agricultural Productivity

The growing population, along with the improved disposable income of consumers, has accelerated the food demand in the

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country. This has increased the demand for agricultural productivity and expanded the agricultural land area. According to the results of a research study by the Food and Agriculture Organization, future food demand in Indonesia is determined by existing demand, income, price and composition, and various other factors that affect the behavior and trends of consumption. The per capita rice consumption projection was forecasted to increase by 1.5% to 99.08 kilograms per capita per year by 2025 and increase by 2% to 99.55 kilograms per capita by 2045. This increased demand is giving rise to imports on a large scale. For instance, according to the ITC trade map, in 2021, the imports of apples reached 189,363 metric tons, which increased from 153,681 metric tons in 2017.

The application of pesticides on fruits and vegetables was observed to gain the highest growth rate by 2026, as per Mordor Analysis. The shift in consumer preferences towards healthy food products has enhanced the market's demand for fruits and vegetables. The need for high productivity to satiate the growing demands will also accelerate the application of crop protection chemicals. As per world bank statistics, the agricultural land area in Indonesia has increased from 60.2 million ha in 2016 to 62.3 million ha in 2018. This is anticipated to drive the market for crop protection chemicals in the country as well.

As the government is planning to transform in-kind food assistance to non-cash subsidies, the implementation of such targeted subsidies could be adjusted in line with the latest development of infrastructure, usage of high-quality inputs and the technology in agriculture. This will drive the sales of crop protection chemicals, which act as an important ingredient in cultivation of food crops.

Insecticides Dominates the Market

In Indonesia, insecticides are the largest crop protection chemicals segment in the region, followed by herbicides and fungicides. Insecticides ensure crop protection from the widespread attack of pests on food crops, especially rice. For instance, the major insects attacking rice plants are the green leaf hopper, stem borer, gall midge, whorl maggot, leaf folder, white-backed plant hopper, and brown plant hopper. The aim is to use productivity by killing unwanted herbs and weeds on the plantation. Hence, an increase in demand for high agricultural productivity to meet global food demands majorly drives the growth of the insecticide market. A surge in population and a rise in disposable income increase the demand for food, pushing Indonesian farmers to use pesticides to increase the productivity of crops.

In the past few years, the number of pesticides registered in the country increased drastically. In 2022, PT Agricon Indonesia launched its new Brofreya 53 SC products. It is a patent product that helps in the eradication of lepidopteran caterpillars. Therefore, increasing demand for insecticides among people and showing effective insect pest management can support the market's growth in the coming years.

Indonesia Crop Protection Chemicals Market Competitor Analysis

The Indonesian crop protection chemical market is highly consolidated with new product launches, partnerships, and mergers and acquisitions are a few major strategies followed by the key players in the Indonesian crop protection chemicals market. Major companies supplying pesticide solutions in Indonesia are PT. BASF Indonesia, Syngenta Indonesia PT, Corteva Agriscience, Biotis Agrindo, and PT. Agricon Indonesia.

Additional Benefits:

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

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