

Germany Crop Protection Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Germany Crop Protection Chemicals Market size is estimated at USD 2.10 billion in 2024, and is expected to reach USD 2.48 billion by 2029, growing at a CAGR of 3.40% during the forecast period (2024-2029).

Key Highlights

- The growing demand for food safety and quality, increasing consumer demand for organic products, and favorable government policies promoting biocontrol products are some factors driving biopesticides' market growth. Germany is one of the pioneers of biopesticide regulations in Europe and hence implemented several measures to support the commercialization of biopesticide products in the country.
- According to the FAO, the total agricultural usage for insecticides accounted for 20,966 metric ton followed by herbicides with 14,618 metric ton, and fungicides and bactericides with 9,483 metric ton during the year 2020. The group 'fungicides and bactericides' was one of the most consumed pesticides in the country during the year 2020. According to Eurostat, Germany occupied 47,973,969 kilograms of pesticides produced during the year 2020 which is higher than 45,181,227 kilograms from the previous year.
- With the increasing demand for food in Germany, the country's pressure to produce sufficient food is increasing. This comes with the need to minimize the losses caused due to the attack of insects and pests. As per FAO, the total cereal production of wheat, barley, and oats accounted for 21,459.2 thousand metric ton followed by 10,411.1 thousand metric ton, and 766.5 thousand metric ton. Septoria tritici is German wheat's most damaging foliar disease, causing yield losses ranging from around 30% to 50% in high-pressure seasons. To mitigate the yield loss, many wheat growers have increased the usage of fungicides in their crops. Chlorothalonil, a fungicide that prevents mildew and molds on crops, is one of the most used pesticides in Germany.

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Rise in Adoption of Bio-Pesticides

There is an increasing demand for organic food and farming in the country over the last few years. According to the statistics of the Research Institute of Organic Agriculture (FiBL), the area under organic cultivation increased from 1.61 in 2019 to 1.70 in 2020. As biopesticides are chemical-free, they are found to be used in large-scale farming in the region.

Considering the environmental damage caused by the chemical pesticide products coupled with the consumers awareness related to the organic products, the country is promoting the usage of biopesticide to protect the environmental damage.

For instance, with the same objective, the country also plans to ban the use of chemical pesticides such as weed killer glyphosate by 2023 because it wipes out insect populations crucial for ecosystems and pollination of food crops. The government is also planning to restrict its use in species-rich areas such as grasslands and orchard meadows. This move is anticipated to boost the demand for biopesticides in the country.

In this regard, Biopesticides are found to be safer alternatives for farmers due to their consistently proven effectiveness. Hence, companies, such as BASF SE and Bayer CropScience AG, which are based in Germany are expanding their product line of biopesticides to have a competitive edge over other players in the region.

Moreover the companies are also expanding their biopesticide production and innovation capacities to cater the rising demand. For instance, recently in January 2023, SGS Germany GmbH expanded its biopesticide testing laboratory. Thus, the rising demand in biopesticide segment is anticipated to drive the market during the forecast period.

Insecticides Segment is Dominating the Market

Germany is one of the largest contributors to the sales of insecticide products in the country. The sales of active ingredients of insecticide in the country reached a record high of 25,344 metric ton, accounting for around 32.7% of the market share in 2021.

Carbamates and pyrethroids are the most commonly used insecticide active ingredients in the country. The rising incidences of environmental damage, coupled with organic farming, are favoring the growth of bioinsecticide products over conventional pesticide products in the German market. For instance, in 2021, the sales of biologically-derived active substances garnered a 5.9% share in the sales of the insecticide active ingredient in the country.

Owing to the high consumption of insecticide in the market, the major players are engaged in developing innovative products in this segment. For instance, in 2021, Syngenta Crop Protection launched an innovative insecticide product called PLINAZOLIN in 40 countries around the world including Germany. According to the company, this new product will provide unprecedented insect control on variety of insects such as on stinkbugs, mites, thrips, caterpillars, flies, and beetles.

However, concerns over environmental impact of chemical pesticides and awareness about the organic food products among the consumers is limiting factor for the growth of the market. To address this challenge, the companies are continuously engaged in research and development activities to come up with the innovative solutions which can mitigate the challenge.

For instance, BASF SE has developed a new product called "Axalion", which has an active ingredient with novel mode of action and high compatibility with beneficial insects, including pollinators, moreover this active ingredient is more environmental friendly compared to its competitor ingredients. According to the company's official statement, this new product is planned to introduce in the German market by 2026.

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Thus, the product innovation by the major pesticide companies in Germany is anticipated to further boost the insecticide segment of the market.

Germany Crop Protection Chemicals Industry Overview

The German crop protection chemicals market is highly competitive, with the presence of a number of international crop protection chemical companies in the region. BASF SE, Bayer CropScience AG, Syngenta AG, Corteva Agriscience, and Adama Agricultural Solutions, are some of the major players who are operating in this market. These players are investing heavily in R&D activities and are launching crop protection chemical products that cater to the needs of the farmers in this region.

Additional Benefits:

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

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