

Rodenticides - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Rodenticides Market size is estimated at USD 2.18 billion in 2024, and is expected to reach USD 2.60 billion by 2029, growing at a CAGR of 3.5% during the forecast period (2024-2029).

Key Highlights

- Asia-Pacific led the market in terms of rate of growth in 2019, owing to a higher demand for rodenticides witnessed in countries such as India and Japan, resulting from rat infestations in agricultural fields, warehouses, and markets.
- However, rigid regulations against the use of second-generation anticoagulant rodenticides in developed countries and regions such as the United States and Europe, are expected to restrain the growth of the overall market.
- The market for rodenticides is fragmented with both international players and regional companies vying for a higher market share in the industry. Some of the major players in the market are BASF SE, Bayer AG, Syngenta, Liphatech Inc., PelGar International, JT Eaton, Neogen Corporation, and Rentokil Initial plc, among others.

Rodenticides Market Trends

Stringent Regulations and Government Ban Restraining the Market

Several stringent regulations and subsequent recommendations for a ban on rodenticides have impacted the overall market in recent years. Empirical studies have proven that anticoagulants are the leading cause of deaths of birds of prey and other scavenger species when they eat their poisoned carcasses. Moreover, humans are also posed with intoxication risks due to rodenticide exposure. The United States Environment Protection Agency (EPA) restricted the sale of the second-generation

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long-acting anticoagulant (LAA) rodenticides such as Brodifacoum and Bromadiolone, in 2013. The AB 1788 Bill was also supposed to ban the second-generation anticoagulant rodenticides (SGARs) in California on account of non-target wildlife poisoning but was pulled away from the Senate Appropriations Committee in August 2019. Moreover, the Biocidal Products Regulation (BPR) of the European Union affects most rodenticides across the region which has further given rise to the Rodenticides Stewardship Regime to be followed by the rodenticide companies and pest controllers. According to the Office for National Statistics (UK) and HM Revenue and Customs, the total export value of rodenticides and molluscicides from EU and non-EU markets in the United Kingdom fell significantly from USD 43.6 million in 2013 to USD 4.7 million in 2018. As such, these factors are expected to affect the demand-supply ratio and prices of rodenticides for agricultural purposes, thus, restraining the growth of the market, during the forecast period.

Asia-Pacific - The Fastest Growing Market

Asia-Pacific registered the fastest growth in the rodenticide market, globally. The frequency of rodent attacks on agricultural fields has been immense in developing countries across the region. According to the International Rice Research Institute (IRRI), rats and mice are estimated to damage 3%-5% of the total cereal crops in developing countries. In 2015, entomologists revealed that up to 54% of the paddy crops were being lost due to rat infestation in Chellampatti and its neighboring areas in Tamil Nadu, one of the largest rice-producing states in India. Moreover, according to a report by the Indian Ministry of Consumer Affairs, about 57,676 metric tons of foodgrains stored in Food Corporation of India (FCI) godowns were damaged due to pest and rodent attacks, leakage of godowns, and exposure to rain and floods, among other reasons. In 2018, Tokyo's Tsukiji fish market with 480 kinds of seafood and 270 types of fruit and vegetable businesses closed down and relocated due to massive rat infestation. As such, the demand for rodenticides in the region is expected to grow during the forecast period.

Rodenticides Industry Overview

The market for global rodenticides is fragmented with the presence of a few international players and numerous emerging players competing to gain a fair share in the rodenticides market, globally. Some of the most active players are BASF SE, Bayer AG, Syngenta, Liphatech Inc., PelGar International, JT Eaton, Neogen Corporation, and Rentokil Initial plc, among others. These companies are targeting countries for business expansion, either by introducing a new product range upon researching, developing and field-testing the product or by acquiring a production unit. For instance, in 2018, BASF launched Selontra rodent bait that provides an efficient and effective rodent control solution through its patented formulation using the active ingredient 'cholecalciferol'.

Additional Benefits:

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

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