

Crop Protection Market Assessment, By Product [Herbicides, Insecticides, Fungicides, Others], By Form [Solid, Liquid], By Source [Natural, Synthetic], By Application [Soil Treatment, Foliar Treatment, Seed Treatment, Others], By Crop Type [Cash Crop, Fruits and Vegetables, Turf and Ornamentals], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global crop protection market is projected to witness a CAGR of 5.41% during the forecast period 2024-2031, growing from USD 71.82 billion in 2023 to USD 109.47 billion in 2031. One of the driving factors for the market is the increasing need for increase in agricultural produce and plants safety from weeds, pests, and diseases.

The market is characterized by major products such as herbicides, insecticides, fungicides, and other solutions. Herbicides hold the largest share of the market since they are largely used to control weeds, whereas fungicides and insecticides are crucial in preventing diseases or pests that would greatly affect yields. In November 2023, FMC Corporation launched Ethos Elite LFR insecticide/bio fungicide, a premix product for crop protection. For a broad range of protection against early-season illnesses and soilborne pests, the solution combines two FMC-proprietary biological strains, Bacillus velezensis strain RTI301 and Bacillus subtilis strain RTI477, with the pyrethroid insecticide, bifenthrin.

Another crucial factor for the market demand of crop protection products is related to the source of products as most of them are made of synthetic chemicals, although there is an increasing trend of natural or organic solutions that are environmentally friendly and comply with stricter regulations.

The efficiency of such substances is dependent on the mode of application, which could be soil treatment, foliar treatment, or seed treatment. The direct contact with the surface of plants makes foliar treatment a preferred mode of application as it delivers faster results. Various crops, such as cash crops, fruits and vegetables, turf, and ornamentals utilize crop protection products. The major part is occupied by cash crops as they are vulnerable to losses.

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In Asia-Pacific, there is an immense growth due to increasing population and food needs. Meanwhile, across North America and Europe, the sector is being transformed by technological progressions and adoption of sustainable farming methods.

Growing Trend of Regenerative Agriculture Catalyze Market Expansion

An increase in demand for environmentally friendly and bio-based crop protection products has resulted from regenerative agriculture approach which emphasizes reducing chemical inputs and enhancing the natural resilience of crops. Regenerative agriculture focuses on enhancing soil fertility, diversification of plant species and maintaining an ecosystem balance through ecologically sound agricultural practices. This is mainly driving the growth of crop protection market due to its growing acceptance rate among farmers globally.

As biopesticides and bioherbicides promote soil health and minimize harm to non-target organisms, farmers are turning to biological alternatives that support regenerative practices. These products are perceived to be crucial in maintaining crop productivity while practicing eco-friendly farming methods.

Furthermore, the focus of regenerative agriculture on enhancing soil fertility and promoting carbon sequestration aligns with global efforts to combat climate change, hence advancing the application of sustainable crop protection strategies. Moreover, through the approval of the U.S. EPA (Environmental Protection Agency), using environment preserving and sustainable crop protection products that improve soil health and promote biodiversity, are made possible, which further fosters regenerative agriculture.

For instance, recently in March 2024, Sym-Agro, Inc. received U.S. EPA approval for extended crop uses of Instill bactericide and fungicide. The approval allowed the use of Instill on potato, coffee, sugar beet, and hazelnut for disease management. As an MRL exempt and locally systemic FRAC M01 fungicide, Instill helps high-value export crops growers to comply with demanding regulations.

New Products Launches to Fuel Market Growth

Driven by product launches, the crop protection market is seeing rapid growth. Manufacturers are developing advanced and reliable means of controlling crops due to shifting agriculture patterns such as pest resistance, climate change, and stringent regulations. This contemporary product range is focused on targeted pests, weeds, and diseases and on keeping with the currently accepted sustainability goals, hence contributing to diminishing environmental pollution.

An instance of such an area of innovation is the production of insecticides that are bio-based and environmentally friendly, thus attracting a huge interest from farmers and states. Synthetic chemicals are being replaced by natural products offered to meet the need for organic farming and regenerative agriculture.

In addition, they include technological progress in formulations such as time-release pesticides or precision application devices that continue improving product performance and ease of application. Farmers are getting better yields with this wave of innovations, which in turn, expands the crop protection market growth with more latest and targeted options.

In September 2023, Croda International Plc launched a delivery system, Atlox BS-50. The product is a ready-to-use spore-forming microbe powder delivery system. Its components have been meticulously optimized to yield optimal performance and have passed viability testing to verify their compatibility with common bacteria, hence offering variety in its application.

Herbicides to Hold a Substantial Market Share

Herbicides account for a significant portion of the market for crop protection as they are crucial in controlling weed growth that could greatly affect the yields of crops. Also, their prevalence, especially in large-scale commercial farming, has made them dominant in this market.

Furthermore, herbicides are popular for their ability to be used on varied crops, including oil seeds, fruits, vegetables, and cash crops. Farmers have multiple choices when it comes to controlling specific kinds of weeds without harming crops as herbicides exist in selective and non-selective forms.

By indicating declines in toxicity and improvements in effectiveness, the development of new formulations of herbicides has improved their market position. Moreover, the introduction of genetically modified (GM) crops that are tolerant to herbicides has increased the demand, permitting farmers to use them without compromising plantations.

In February 2024, Corteva Agriscience launched its latest herbicide, Enversa, for use on soybeans, corn, cotton, sorghum, sugar beets, and peanuts. Enversa herbicide offers a simple approach to handling and tank-mix compatibility. It works excellently with Enlist One herbicide that is used for Enlist E3 soybean and Enlist cotton.

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Asia-Pacific to Hold the Dominating Market Share

Due to agriculture being a crucial sector in the region and food security concerns, Asia-Pacific leads the global crop protection market. Countries such as China, India, and Indonesia are major players in this regard. The demand for crop protection products across the region has risen due to high levels of pests and diseases and the need for increasing crop yields on limited arable land. Swift growth of intensive farming techniques and the rising knowledge of advanced approaches to protecting crops have contributed to the development of the market. Farmers in the region are increasingly turning to herbicides, insecticides, fungicides, and bio-based substitutes to improve productivity and minimize crop losses. In addition, government initiatives aimed at fostering sustainable agriculture and promoting safe and potent pest control solutions are accelerating the market growth. Through the participation of prominent manufacturers and increasing attention paid to investigating and improving new, environment-friendly crop security products, Asia-Pacific's supremacy is intensified to the region's unique farming challenges. In June 2024, the latest rice fungicide, Cevya, was launched by BASF Agricultural Solutions in China. This was the first and only isopropanol triazole fungicide which can provide effective prevention and control of rice false smut.

Future Market Scenario (2024 - 2031F)

- With more people caring about the environment, and governments placing stricter environmental regulations, a trend of shifting from synthetic to organic pesticides, is expected to be witnessed by growing sectors in agricultural production.

- The movement towards precision farming will necessitate the need for unique, technology-enabled solutions for crop protection.

- The necessity for proficient farming techniques will stimulate the application of crop protection products owing to increased food demand. It is anticipated that governments will remain supportive of agriculture, thus enhancing the growth of the market.

Key Players Landscape and Outlook

The crop protection market is highly competitive, with several key players dominating due to their extensive product portfolios, global reach, and continuous investment in research and development. Leading companies are focused on developing innovative and sustainable solutions to tackle agricultural challenges such as pest resistance, evolving environmental regulations, and the need for higher productivity. Their ability to offer a wide range of products, including herbicides, insecticides, fungicides, and bio-based alternatives, has cemented their strong market position.

For instance, in July 2024, Sumitomo Chemical Co., Ltd. launched Empera, a herbicide originated at 5.5% as an emulsifiable concentrate, in Argentina. The solution is adaptable and can be used up to a few days before the seeding of different crops, including fallow seasons. In addition to providing excellent control over *Amaranthus* sp., a weed that causes problems in Argentina, the company formulated Rapidicil that can manage a variety of annual summer and winter grasses.

Regional companies and emerging start-ups specializing in bio-based crop protection products are gaining popularity. This growth is fueled by the increasing demand for natural and eco-friendly alternatives to synthetic chemicals. Strategic collaborations, mergers, and acquisitions are common in the industry as companies seek to expand their market presence and enhance their technological capabilities.

The market is expected to maintain robust growth, with a strong emphasis on sustainability and precision agriculture. As the demand for organic produce and sustainable farming practices rises, the development of environmentally friendly, bio-based, and advanced crop protection solutions will become increasingly important in shaping the future of the industry.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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