

Insect Repellent Market Assessment, By Product Type [Sprays, Creams and Lotions, Coils, Aerosols, Others], By Insect Type [Mosquitoes, Flies, Bugs, Others], By Raw Material Type [Natural, Synthetic], By Application [Residential, Commercial], By Distribution Channel [Online, Offline], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global insect repellent market is projected to witness a CAGR of 6.88% during the forecast period 2024-2031, growing from USD 5.39 billion in 2023 to USD 9.18 billion in 2031. The market worldwide is developing rapidly due to a number of factors, such as the rise in the incidences of vector-borne diseases such as malaria, dengue fever, and Zika virus. The growing concerns about health and safety among consumers have increased the sales of insect repellents as consumers are looking for the most efficient options. In March 2024, Syngenta Crop Protection AG introduced a cockroach gel bait, Advion Trio, to stop cockroaches at any life cycle stage. The product contains three active ingredients that work in distinct ways, including two insect growth regulators (IGRs). IGRs are included in the form of pyriproxyfen and novaluron, which prevent the development of first and late instars of nymphs into adults. The active ingredient indoxacarb aims to target the already-mature cockroach population. Moreover, apart from individual consumption, the agricultural domain is rapidly becoming an important aspect of the market for insect repellents. As a result, more farmers are using insect repellents to shield crops from insects, which could otherwise cause severe financial losses. For instance, in May 2024, BASF SE launched its latest insecticide, Efficon, to help farmers fight bugs that penetrate and suck crops. Farmers can use Efficon to protect a variety of crops from insect pests, including cotton and vegetables. In addition, the market is evolving towards the use of more natural and organic formulations because consumers are opting for eco-friendly products. This trend leads to the enhancement of repellent technologies, enhancing the efficacy and safety of different formulation types.

The increasing shift towards outdoor recreational activities, especially in tropical and subtropical zones, is further adding to

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market growth since many people have started to use insect repellents due to activities such as camping, hiking, and other outdoor activities. Hence, the global insect repellent market is set for sustained growth, driven by health factors, agricultural uses, and shifts in consumer behavior.

Rising Crop Protection Awareness Among Farmers Catalyzes Market Expansion

The use of insect repellents in agriculture is gradually becoming more important in present-day farming, especially for pest control measures. Crop insect repellents are used by farmers to protect crops from a number of pests, such as aphids, locusts, and beetles, which can be detrimental if they remain unchecked. Farmers, are therefore, able to expand the yields of various crops and enhance the quality of crops produced by preventing destructive pests from infesting the crops.

Additionally, integrating insect repellents into agriculture is in agreement with the current inclination to incorporate sustainable means of food production, as it helps minimize the application of harmful substances such as chemical pesticides, which are known to do more harm than good to the environment and beneficial insects. Plant-based constituents are safe and organic, which makes natural and organic insect repellents more popular among farmers. For instance, in May 2024, BASF SE introduced Cimegra, an insecticide specifically aimed at the Australian farming community. This solution contains the active ingredient Broflanilide, which targets the most stubborn pests, such as the Diamondback moth. It is appropriate for application on brassica vegetables. Moreover, the rising preference of people for organic fruits and vegetables has made it necessary for farmers to use organic certified insect repellents.

Preference for Natural Products Influence Market Growth

The global market for insect repellants is vastly influenced by growing consumers' preference for natural and safe insect repellents. Health awareness is a driving factor, as many people are wary of the effects of artificial chemicals on themselves and their surroundings. Organic insect repellent products, which are made from substances such as citronella, eucalyptus, neem, and other such components, are endorsed by the factors as safe for everybody and everything, including pets and children.

Furthermore, the increasing preference for organic and sustainably sourced items is encouraging manufacturers to find ways to create more effective and safe natural compositions for their products. These natural insect-repelling solutions protect us from insect intrusion and meet the demand of health-conscious consumers looking for healthier alternatives. For instance, in March 2024, Starbar, owned by Central Garden & Pet Company, launched Starbar Aviator Fly Bait Aerosol, which controls labeled flies where traditional baits are unable to reach. Offering multiple tiers of fly population management for house flies, fruit flies, and vinegar flies, the company helps to make sure that the environment is clean and productive. The product is used on non-porous surfaces that are shielded from rain and direct sunlight for effective residual control of up to 30 days.

Mosquito Repellents to Hold a Significant Market Share

In the global insect repellent industry, mosquito repellents have a higher share, driven by the rise in cases of diseases such as malaria, dengue fever, and Zika virus, which are transmitted by mosquitoes. They create a huge health risk, therefore, people tend to be more concerned with measures aimed at preventing mosquito bites. Utilization of mosquito repellent is heightened by seasonal variations and an increase in outdoor activities, especially in places with a lot of mosquitoes.

This section is mainly occupied by products with active ingredients, such as DEET and picaridin, and natural components, such as citronella and lemon eucalyptus oil. People accustomed to the use of mosquito repellents are compelling the manufacturers to create more advanced versions. Moreover, the increasing inclination towards outdoor activities, such as camping and trekking, further enhances the consistent need for these mosquito protection products. With the rise in awareness regarding health issues due to mosquito bites, it is anticipated that the market share of mosquito repellent will continue to be significant, propelling continuous expansion of the global insect repellent market.

In March 2023, The Procter & Gamble Company's pest control brand, Zevo, launched its latest mosquito and tick repellent, Zevo On-Body Mosquito + Tick Repellents. The product offers an eight-hour non-sticky and odorless protection from mosquitoes and ticks. It uses the active ingredient IR3535, which can easily be used on the face and body.

Asia-Pacific to Dominate Market Share

The insect repellent market worldwide is greatly fueled by Asia-Pacific due to several demographic and geographical factors, such as a higher population disposition, the presence of warm climates that enable insects to breed, and the outbreak of mosquito-borne diseases, such as malaria and dengue fever. Thus, places such as India, China, and Indonesia, which have these health concerns, have a high demand for insect repellents. In fact, in June 2024, researchers from Kao Corporation found that the

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effects of silicone oil or low viscosity polydimethylsiloxane (L-PDMS) are on the sensory abilities of mosquitos. The addition of silicone oil to repellents enhances the adhesiveness of repellents to mosquito legs and reduces the bites on the skin of humans. Also, silicone oil improves the effectiveness of active ingredients as the latter prevents the tracking of objects and encourages mosquitoes to shun the odors applied to it.

Besides the individual application, the agricultural sector in the region is increasingly incorporating the use of insect repellents for the protection of crops from pests, hence ensuring food security and improving yield. Pesticides are used by farmers, together with natural deterrents, for the protection of their produce from common agricultural pests as there is a shift towards organic and better farming methods.

Future Market Scenario (2024 - 2031F)

-□With the shift toward organic and more eco-friendly products, consumers will seek natural, plant-based, and safer insect repellents, which are considered to be less harmful to the environment, leading to overall market growth.

-□With the trend towards sustainable pest management measures among farmers in this sector, the agricultural sector will experience a notable increase in the use of insect repellents, resulting in higher adoption rates of natural repellents in accordance with organic farming practices.

-□In view of the rising global incidents of insect-borne diseases, health bodies, and governments are expected to conduct more campaigns on the dangers associated with these diseases, thus increasing the urge for effective insect repellents among consumers and encouraging them to take precautionary measures.

Key Players Landscape and Outlook

The key players in the global insect repellent market comprise a diverse range of companies specializing in personal care, agricultural products, and pest management solutions. These companies are actively innovating to develop effective formulations that cater to evolving consumer preferences for safety and environmental sustainability. For instance, in February 2023, Dr. Killigan's, Inc. launched a completely natural moth repellent, Cedar Planks, for protecting carpets, clothes, bedding, and other such items from moth larvae. Each box of Dr. Killigan's Cedar Planks includes ten handcrafted planks and ten metal hangers for clothing rods. Cedar Planks can be used in drawers and other areas as a first line of defense against clothes moths.

A significant trend among market leaders is the increasing investment in research and development to enhance the efficacy of chemical and natural insect repellents. Collaboration with agricultural experts and health organizations is common, aiming to create products that address specific regional pest challenges and health concerns.

Additionally, the emphasis on sustainable practices is prompting many players to adopt eco-friendly packaging and natural ingredients, aligning their offerings with consumer demand for green products. As the market continues to grow, companies that prioritize innovation, safety, and sustainability are expected to maintain a competitive edge, positioning themselves favorably for future expansion in the insect repellent market.

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