

South Africa Agrochemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The South Africa Agrochemicals Market size is estimated at USD 1.32 billion in 2025, and is expected to reach USD 1.60 billion by 2030, at a CAGR of 3.9% during the forecast period (2025-2030).

Key Highlights

- As Africa's largest crop protection market, South Africa caters to a diverse range of farmers. These farmers operate across multiple sectors, including row crops, horticulture, citrus, nuts, and vines, spanning deciduous, subtropical, and forestry markets. Data from South Africa's Ministry of Agriculture, Land Reform, and Rural Development indicates that gross income from agricultural products hit USD 23 billion in 2022, a rise from USD 20.2 billion in 2021, translating to a 15.2% growth. This surge was largely driven by a 27.8% increase in income from field crops and a 5.8% rise in horticultural products. Such robust growth in the agricultural industry is significantly bolstering the agrochemicals market in South Africa.
- Over the past two decades, South Africa has witnessed a decline in the land area utilized for agriculture despite its expansive territory. This trend has intensified the push for enhanced production efficiency, subsequently driving up the demand for agrochemicals. With the economy on the rise, farmers are increasingly recognizing the crucial role of agrochemicals. The potential embrace of integrated farming practices stands to amplify this market. Consequently, the quest for efficiency, underscored by agrochemicals, remains a dominant force propelling market demand.
- Fertilizer prices across Africa diverge significantly from global rates, underscoring supply chain challenges intensified by the Russia-Ukraine conflict. South Africa's reliance on Russia for ammonium nitrate, a key ingredient in fertilizer production, poses challenges. The ongoing conflict is also affecting South Africa's fruit exports, notably citrus shipments to Russia. As growers seek alternative markets, this dynamic presents a constraint on the growth of the fertilizer segment.

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South Africa Agrochemicals Market Trends

Increasing Demand for Bio-based Agrochemicals

- South Africa's export portfolio prominently features citrus fruits, including oranges, lemons, acid limes, grapefruits, and, to a lesser extent, tangerines. Data from The Research Institute of Organic Agriculture FiBL reveals that in 2022, organic cereals occupied 2.2 thousand hectares, while citrus fruits were cultivated on 1.1 thousand hectares. As a major supplier of fresh fruit to the European Union, South Africa set a record by shipping 18,863 metric tons of citrus fruits. With the country's robust export potential in organic produce targeting international markets, a notable increase in the consumption of bio-based agrochemicals is on a surge.
- South Africa has a burgeoning opportunity for bio-based crop protection products, especially those without residues. This is of paramount importance for export markets. The scope encompasses traditional crop protection solutions, biological products, and bio-stimulants. Notably, crop protection companies are channeling investments into these biological products. The biological products outperform conventional chemical products, especially in the export crop arena. Also, tightening environmental regulations are poised to influence the herbicide and insecticide markets. Producers increasingly prioritize sustainable pest control, adopting integrated pest management systems and programs, which bodes well for market growth.
- As chemical fertilizer prices continue to surge, more individual farmers are pivoting toward biofertilizers. In 2023, a farmer from Tsolo in the Eastern Cape crafted an economical biofertilizer, targeting local farmers struggling with high fertilizer expenses. This innovative biofertilizer is formulated using a mix of four native mycorrhizal fungi species. The key ingredient, mycorrhizal fungi, combines activated carbon from biochar, serving as its carrier. This potent duo boosts the plant's ability to absorb and make the most of soil nutrients and water. Such advancements are poised to introduce novel products in the fertilizer segment.

Rising Exports of Fruits and Vegetables to Drive Production

- In 2023, South Africa's agricultural industry achieved remarkable export milestones. According to Trade Map data, exports of fruits and vegetables surged to a record USD 4.55 billion, with fruits constituting over 99% of the total. Dominant exports included citrus, maize, apples, pears, nuts, grapes, berries, and avocados. Both increased volumes and rising prices drove this surge in export activity. Notably, the increase in export prices for South African fruits could stimulate heightened production and a surge in demand for agrochemicals.
- Exports were strategically diversified across several key markets. In 2023, the African continent led the charge, representing 38% of South Africa's agricultural export value. Asia followed as the second-largest market, accounting for 28%, trailed by the European Union at 19%. The Americas secured the fourth spot with 6%, while the remaining 9% was distributed to other global markets. The United Kingdom stood out in the 'Rest of the World' segment, accounting for 7% of total exports.
- South Africa stands out as a top global producer and exporter of grapes. As per ITC Trademap, the nation's grape exports reached a valuation of USD 714 million. However, grape crops in South Africa face challenges, notably from downy mildew. Commercial vineyards regularly implement fungicide spray programs to combat diseases like powdery mildew and Botrytis bunch rot.
- Due to increasing exports, the country is ramping up its production. This surge in production is expected to bolster the agrochemicals market, given the essential role in sustaining these production levels.

South Africa Agrochemicals Industry Overview

The South African agrochemicals market is fragmented, with many international and domestic players operating. The major

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players in the South African agrochemical market include Sociedad Quimica y Minera de Chile (SQM), OCP Group, Sasol Limited, Yara International, and K+S AG. These prominent players are expanding their positions in the country to have a wide-reaching consumer base for their agrochemical products. Further, key players are coming up with new innovative products that cater to the needs of the growers in the region.

Additional Benefits:

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

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