Rodenticides - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 120 pages | Mordor Intelligence

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Report description:

Rodenticides Market Analysis

The rodenticides market stands at USD 6.0 billion in 2025 and is forecast to reach USD 7.66 billion by 2030, advancing at a 5.0% CAGR over the period. Rising climate-driven rodent populations, widening food-security gaps, and tightening public-health standards keep demand resilient across agricultural, commercial, and residential settings. Stringent sanitation rules in global food trade, combined with extended breeding seasons in warmer urban environments, amplify the need for reliable chemical and non-chemical solutions. Regulatory shifts restricting second-generation anticoagulant rodenticides (SGARs) in California and the United Kingdom accelerate innovation in low-toxicity flocoumafen and fertility-control products. Digital monitoring, including IoT-enabled bait stations, is lowering labor costs for pest-control operators while giving manufacturers new avenues to differentiate offerings. Consolidation among the top five suppliers, holding roughly 73% of the global rodenticides market, underscores the importance of scale in meeting evolving compliance and stewardship expectations.

Global Rodenticides Market Trends and Insights

Surge in Bio-secure Commodity Trade Standards

Trade agreements increasingly require certified rodent-control protocols to prevent cross-border pest transmission, compelling grain terminals, warehouses, and shipping lines to adopt professionally applied rodenticides and integrated pest-management (IPM) plans. Parallel mandates in the European Union and North America tie export eligibility to pest-free storage certificates, prompting exporters to deploy tamper-resistant bait boxes that comply with SGAR stewardship codes. These measures shield multi-million-dollar consignments from quarantine holds, making professional-grade rodenticides a frontline tool in safeguarding trade continuity. The economic incentive widens as the OECD-FAO Agricultural Outlook anticipates 1.3% annual consumption growth through 2032, intensifying pressure on already-stretched logistics networks.

Increasing Demand for Food and Agricultural Productivity

Rising calorie needs and climate-induced yield volatility expose grain and horticulture systems to heavier post-harvest losses, which can reach 30-40% in emerging markets when rodent control is inadequate. Field studies across Asian rice belts show ecologically based rodent management lifting yields 6-15% and farm incomes beyond 15%, a compelling return on rodenticide investments. In Africa, multimammate rats shave as much as 48% from maize harvests, pushing governments to subsidize broad-acre zinc-phosphide campaigns. The Food and Agriculture Organization confirms that combining structural silo upgrades with targeted chemical control sharply curtails storage losses. As climate shifts stretch breeding seasons, growers scale up from spot treatments to programmatic applications, reinforcing long-run volume growth in the rodenticides market.

Rise in the Number of Resistant Pests

Genetic mutations, particularly in the Vkorc1 gene, undermine first- and second-generation anticoagulants, raising treatment costs and prolonging infestation timelines. Lebanese fieldwork confirmed resistance in house mice and rats despite limited oversight of rodenticide sales. New Zealand studies detected brodifacoum tolerance in isolated populations lacking prior exposure, hinting at spontaneous resistance via genetic drift. California ground squirrels now survive diphacinone and chlorophacinone pulses, compelling rotation to zinc-phosphide or cholecalciferol mixtures. Resistance inflates service calls and drives investment in diagnostics, tempering volume growth for legacy chemistries.

Other drivers and restraints analyzed in the detailed report include:

Proliferation of Large-scale Vertically Integrated Farming / Rapid Urban Rodent Infestations Linked to Climate Change / Environmental and Human Health Hazards /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Anticoagulants secured 66.0% of 2024 revenue, underpinning the rodenticides market leadership story. Their single-dose lethality against resistant strains anchors usage in warehouses and food plants even as regulators trim permissible concentrations. Second-generation molecules such as brodifacoum stay favored among professionals, yet non-anticoagulant classes clock a 7.8% CAGR to 2030, pulling demand toward zinc phosphide and cholecalciferol hybrids. Studies show zinc phosphide trimmed field populations by 58.15%, eclipsing traditional first-generation outcomes.

In parallel, bromethalin and strychnine hold niche utility for burrow systems where anticoagulant resistance soars. Regulatory headwinds against metal phosphides in low-income regions temper broader adoption, yet specialized needs sustain modest demand. Overall, portfolio diversification lets market leaders buffer exposure to any single regulatory clampdown, keeping the rodenticides market adaptable.

Blocks retained a commanding 45.0% slice of 2024 demand thanks to weather resistance and compatibility with tamper-proof stations mandated under SGAR stewardship. Professionals appreciate their longevity outdoors, limiting callbacks. Pellets followed at 40.5%, favored for mechanical broadcast across rice paddies and row crops. The rodenticides market size attributable to liquid concentrates is forecast to grow 7.4% CAGR, outpacing overall sector expansion as precision spray rigs and bait baggers gain traction.

Field work shows paraffin blocks kept 100% active-ingredient recovery in open air, though 50% detached within five weeks, prompting innovation in anchor systems. Pastes and gels win share in high-visibility retail and hospitality settings, where discreet application matters. Powders are declining due to drift concerns but retain relevance for fumigant burrow dusting in grain facilities. Ready-to-use sachets answer homeowner calls for simplicity, yet rising licensing barriers on SGARs tilt the DIY aisle toward first-generation actives or fertility tablets.

The Rodenticides Market Report is Segmented by Type (Non-Anticoagulant Rodenticides, and Anticoagulant Rodenticides), Form (Blocks, Pellets, Powders, and More), Application (Agricultural Fields, Warehouses and Storage Facilities, and More), Mode of Distribution (Pest Control Operators (PCO), and More) and Geography (North America, Europe, Asia-Pacific, and More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

North America maintained the largest regional market share at 36% in 2024, reflecting mature regulatory frameworks, high adoption of professional pest control services, and substantial commercial and industrial applications. The region's leadership stems from stringent food-safety regulations in warehousing and processing facilities, extensive agricultural operations requiring systematic pest management, and urbanization patterns that create ideal conditions for rodent infestations. Growth is projected at 4.1% CAGR through 2030, constrained by environmental regulations yet supported by climate-driven urban rodent population rises and advances in application technology. The Environmental Protection Agency's comprehensive rodenticide strategy, released in November 2024, delivers regulatory clarity while adding targeted mitigation measures for endangered-species protection.

Asia-Pacific represents the fastest-growing regional segment at a 6.2% CAGR to 2030, propelled by rapid urbanization, agricultural expansion, and heightened food security awareness in developing economies. China's rodent programs rely heavily on diphacinone for commensal species and zinc phosphide for field pests, with provincial agencies coordinating large-scale campaigns across urban and rural zones. Ecologically-based rodent management has lifted cereal yields by 6-15% and farm income by more than 15% across multiple nations, reinforcing adoption momentum.

Europe advances at a 3.8% CAGR through 2030 as harmonized EU rules encourage standardized product labeling and spur the development of eco-friendly formulations. The United Kingdom's ban on outdoor bromadiolone and difenacoum, effective July 2024, shifts product portfolios toward cholecalciferol and flocoumafen. Africa and the Middle East post 5.5% and 4.9% CAGRs, respectively, driven by urban growth, expanding agriculture, and public health measures aimed at rodent-borne diseases. Latin America moves ahead at a 5.2% CAGR, with Brazil's bio-security-centered trade rules underpinning steady demand. A gradual shift toward ecologically based rodent management in Sub-Saharan Africa signals a strategic evolution, yet acute outbreaks still necessitate conventional rodenticides.

List of Companies Covered in this Report:

BASF SE / Bayer AG / Syngenta AG / Liphatech / Rentokil Initial plc / Neogen Corporation / JT Eaton / Bell Laboratories / SenesTech Inc. / PelGar International / Impex Europa / Russell IPM / Truly Nolen / Vebi Istituto Biochimico / Fumakilla / UPL Limited / Detia Degesch GmbH /

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Table of Contents:

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