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Herbicides Market Research Report - Global Forecast till 2032

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Description:

Herbicides Market Overview

Herbicides Market Size was prized at USD 31.5 billion in 2022. The herbicides market industry is projected to grow from USD 33.39 Billion in 2023 to USD 53.21 billion by 2032, exhibiting a compound annual growth rate (CAGR) of 6.00% during the forecast period (2023 - 2032). Increasing desire for higher crop yields, rapid adoption of better farming techniques, new agricultural technologies, and a lack of fertile land are the key market drivers enhancing the market growth. The industry is also expanding due to many advantages of herbicides over tillage, including decreased erosion, greenhouse gas emissions, fuel use, and nutrient runoff.

Herbicides Market Overview

Source: Primary Research, Secondary Research, MRFR Database and Analyst Review

Herbicides Market Trends

- Rising food demand is driving the market growth

Market CAGR for herbicides is being driven by the rising demand for food. The Food and Agriculture Organisation (FAO) projects that between 2009 and 2050, the population will increase by almost a third, or 2.3 billion people. The per capita income is also anticipated to rise in the same period. Food demand is anticipated to increase along with rising per capita income and population. For instance, the FAO projects that by 2050, food demand in the United States will have increased by 50% to 90%. It is difficult to produce enough to guarantee food security because of various problems, including climate change, pest outbreaks, a lack of capital, and a shortage of agricultural land. Therefore, herbicides and other crop protection chemicals are necessary to increase production and satisfy worldwide demand. Due to labor scarcity and the need to replace tillage with herbicides to improve environmental conditions, herbicides are being used more and more frequently worldwide. Numerous businesses are expanding their product portfolios to increase land productivity through product innovation in response to the rising need for herbicides, increasing demand for the herbicides market.

Over the past five years, the herbicide market has seen a considerable rise in mergers and acquisitions. These partnerships aim to broaden the product line or distribution systems. Low food commodity prices, which impact producers and distributors of pesticides and cause industry consolidation, are another possible explanation. For instance, in May 2021, the Swiss agrichemical giant Syngenta Crop Protection sold its Envoke brand herbicide to US-based AMVAC Chemical Corporation for an unknown fee. With the addition of the new portfolio, AMVAC can now provide customers with cutting-edge weed management options. An herbicide called Envoke is used to manage weeds in cotton, sugarcane, and transplanted tomatoes. Thus, driving the herbicides market revenue.

Herbicides Market Segment Insights

Herbicides Active Ingredient Insights

The herbicides market segmentation, based on active ingredient, includes glyphosate, 2, 4-D, atrazine, diquat, and others. In 2022, the glyphosate category dominated the market. Product advantages over mechanical tillage technologies, such as cheap cost, less soil degradation, and environmental protection, support the glyphosate sector's growth.

January 2021: Syngenta introduced a glyphosate product, Kesuda isopropylamine salt of N-glycine 41%, to the Chinese market. The solution addresses the bottlenecks of traditional glyphosates, such as instability at low temperatures, delaying weed death, and ineffective weeding.

Additionally, 2,4-D would account for a sizeable portion of the market for selective herbicides. The use of 2,4-D in creating selective herbicides is expected to increase as 2,4-D-based products in various forms, such as powder and sprays, become more widely used.

Herbicides Category Insights

The herbicides market segmentation, based on category, includes synthetic herbicides and bioherbicides. In 2022, the bioherbicides segment had the biggest and the fastest revenue share. One of the factors influencing the market's growth is the increased awareness of bio-based herbicides due to rising health concerns and environmental effects. The agriculture industry also prioritizes managing weeds, which necessitates the ongoing use of pesticides. Due to its affordability compared to bio-based herbicides, accessibility, and ease of use, the synthetic sector is anticipated to rise steadily throughout the projected period.

Figure 1: Herbicides Market, by Category, 2022 & 2032 (USD billion)

Herbicides Market, by Category, 2022 & 2032

Source: Primary Research, Secondary Research, MRFR Database and Analyst Review

Herbicides Mode of Action Insights

The herbicides market segmentation, based on the mode of action, includes selective and non-selective. In 2022, the non-selective category contributed a major portion of revenue. For this segment's revenue to increase, unwanted plants and weeds must be effectively and economically removed from areas. In addition, selective herbicides were the fastest-growing sector. Selective herbicides control the growth of particular weed species while protecting the desired crop. When used appropriately, this property makes selective herbicides less damaging to the environment. Selective herbicides' main objective is to protect the crop during its early growth stages.

Herbicides Crop Type Insights

The herbicides market segmentation, based on crop type, includes pulses & oilseeds, cereals & grains, fruits & vegetables, and others. In 2022, the segment with the highest revenue share was cereals & grains. The world's high consumption of grains and cereals, which serve as the primary food source worldwide, is a key reason for this sector's expansion. However, in 2022, the fruits and vegetables sector saw the fastest growth rate of herbicides. Growing demand for fruits and vegetables, rising population, rising health concerns, and growing concern for food security and vegetarian diets contribute to the sector's growth.

Herbicides Regional Insights

By region, the report provides market insights into North America, Europe, Asia-Pacific and Rest of the World. The North American herbicides area will dominate this market. The market is expanding rapidly due to the quick development of technology and rising merger and acquisition activity by key organizations in this area. On May 17, 2022, Syngenta Seedcare introduced VICTRATO, a new seed treatment designed to boost the quality and productivity of many crops, including soybeans, cotton, cereals, maize and rice, as well as to target harmful nematodes and soil-borne fungal diseases. TYMIRIUM technology, a high-performing and low-dose active ingredient innovation, is a component of VICTRATO.

Further, the major countries studied in the market report are U.S., Canada, France, German, Italy, UK, Spain, Japan, China, Australia, India, South Korea, and Brazil.

Figure 2: HERBICIDES MARKET SHARE BY REGION 2022 (%)

HERBICIDES MARKET SHARE BY REGION 2022

Source: Primary Research, Secondary Research, MRFR Database and Analyst Review

Asia-Pacific herbicides market accounts for the second-largest market share. Initiating more R&D projects to boost grain production, like TEKFAARM by the Grains Research & Development Corporation (GRDC), is a program for finding the finest ag-tech solutions and bringing them to Australia. The region's market is expanding due to the use of herbicides to increase agricultural yields on less productive land and supplement rising food consumption. Moreover, China's herbicides market held the largest market share, and the Indian herbicides market was the fastest-growing market in the Asia-Pacific region.

The Europe Herbicides Market is expected to grow at the fastest CAGR from 2023 to 2032. Supportive government regulations and ongoing expenditures in creating new, efficient, and environmentally friendly herbicide products are a few of the key elements anticipated to propel market expansion. The market is expanding due to the quick uptake of contemporary and integrated farming techniques. Further, the German herbicides market held the largest market share, and the UK herbicides market was the fastest-growing market in the European region.

Herbicides Key Market Players & Competitive Insights

Leading market players are investing heavily in research and development to expand their product lines, which will help the herbicides market, grow even more. Market participants are also undertaking various strategic activities to expand their footprint, with important market developments including new product launches, contractual agreements, mergers and acquisitions, higher investments, and collaboration with other organizations. To expand and survive in a more

competitive and rising market climate, the herbicides industry must offer cost-effective items.

Manufacturing locally to minimize operational costs is one of the key business tactics manufacturers use in the herbicides industry to benefit clients and increase the market sector. In recent years, the herbicides industry has offered some of the most significant medical advantages. Major players in the herbicides market, including Element Solutions Inc (US), Kenvos Bio (China), Bayer AG (Germany), FMC Corporation (US), and others, are attempting to increase market demand by investing in research and development operations.

Adama Ltd manufactures crop protection chemicals. It has two business segments: crop protection and intermediates and ingredients. Crop Protection encompasses conventional agrochemical product manufacturing, marketing, and seed activities. The intermediates & ingredients segment contains many sub-fields, such as Lycopan (an oxidation retardant), aromatic compounds, and other chemicals. In May 2022, ADAMA Ltd. introduced Cheval, a premium pre-seed and post-emergence herbicide for soybeans and other crops, in Brazil. Cheval is projected to benefit farmers significantly due to its prolonged residual effect and unique formulation. T.O.V Formulation Technology created Cheval, which increases the efficacy of active compounds.

Bayer is a German conglomerate involved in healthcare and agriculture. The company's crop science division comprises seeds, insecticides, herbicides, and fungicides, which it expanded after acquiring Monsanto. Bayer primarily sells its healthcare and crop protection products to wholesalers, pharmacies, hospitals, and retailers. It has subsidiaries in Asia-Pacific, Europe, North America, Latin America, Africa, and the Middle East. In July 2022, Bayer introduced Mateno Plus in Uruguay, a new herbicide for managing broadleaf weeds and grasses that harm wheat and barley crops. Flufenacet, which inhibits cell division; Diflufenican, which inhibits carotenoid synthesis; and Aclonifen, which inhibits carotenoid synthesis and chlorophyll production, suppressing a wide range of weeds.

Key Companies in the herbicides market include

- BASF SE (Germany)
- The Dow Chemical Company (US)
- Monsanto Company (US)
- FMC Corporation (US)
- Bayer AG (Germany)
- Agrium Inc (Canada)
- PI Industries (India)
- Syngenta AG (Switzerland)
- Element Solutions Inc (US)
- Nufarm Limited (Australia)
- Nissan Chemical Industries Ltd. (Japan)
- Drexel Chemical Company (US)
- ADAMA Ltd. (Israel)
- Kenvos Bio (China)
- UPL (India)

Herbicides Industry Developments

March 2022: Sipcam, Albaugh, and Australian Grain Technologies (AGT) have formed a three-way strategic alliance to provide the CoAXium Production System to Australian barley producers. This collaboration will bring together essential components of the CoAXium Production System, non-GMO herbicide tolerance trait, aggressor brand herbicides, elite barley germplasm, and industry stewardship.

January 2022: Syngenta Canada Inc. announced the release of Erebus™ Xtreme. This new cross-spectrum cereal herbicide combines active ingredients from Groups 2 and 4 for improved grass and broadleaf weed control. Erebus Xtreme is a liquid pre-mix formulation of pyroxulam (Group 2) and fluroxypyr (Group 4) for spring, winter, and durum wheat.

Herbicides Market Segmentation

Herbicides Active Ingredient Outlook

- Glyphosate

- 2, 4-D
- Atrazine
- Diquat
- Others

Herbicides Category Outlook

- Synthetic Herbicides
- Bioherbicides

Herbicides Mode of Action Outlook

- Selective
- Non-Selective

Herbicides Crop Type Outlook

- Pulses & Oilseeds
- Cereals & Grains
- Fruits & Vegetables
- Others

Herbicides Regional Outlook

North America

US

Canada

Europe

Germany

France

UK

Italy

Spain

Rest of Europe

Asia-Pacific

China

Japan

India

Australia

South Korea

Australia

Rest of Asia-Pacific

Rest of the World

Middle East

Africa

Latin America

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