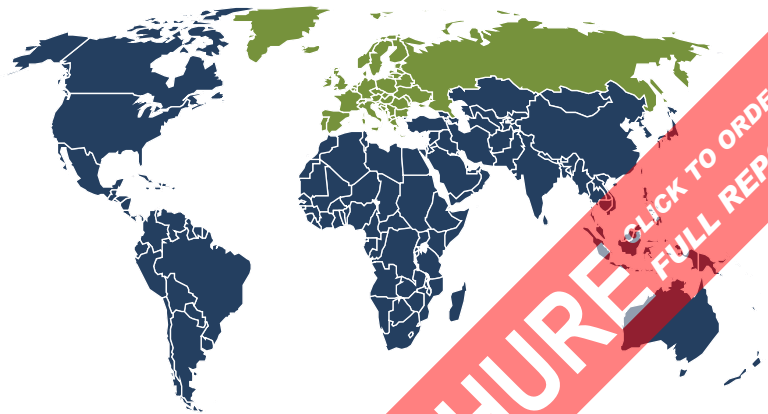




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Agricultural Pesticides: Europe

January 2022



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About This Report

Scope

This report forecasts to 2025 agricultural pesticides demand in nominal US dollars at the manufacturer level in Europe. Total demand is segmented by product in terms of:

- herbicides
- fungicides
- insecticides
- other pesticides such as bactericides, defoliants and desiccants, and nematicides

Total demand is also segmented by crop as follows:

- vegetables and potatoes
- fruit
- corn
- wheat
- barley
- other crops such as soybeans, rice, and cotton

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; the various segments are reported at five-year intervals for 2010, 2015, and 2020.

Also included in the scope of this report are repellants, which instead of killing pests, are designed to repel or discourage their presence. Excluded from coverage in this report are:

- bulk commodities such as copper, sulfur, and petroleum oils
- wood preservatives
- disinfectants and antimicrobials – which are often regulated as pesticides
- commercial (including floriculture) and consumer (including home edible gardening)

Unless otherwise specified, data are for formulated pesticide products (i.e., the first level of formulation after the production of technical-grade pesticide active ingredients).

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2020.

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

For the purposes of this report, Europe encompasses the following countries:

Table 5 | Countries in Western Europe

Andorra	Germany*	Italy*	Portugal*
Austria	Gibraltar	Jersey	Saint Pierre and Miquelon
Belgium*	Greece*	Liechtenstein	San Marino
Channel Islands	Greenland	Luxembourg	Spain*
Denmark	Guernsey	Malta	Sweden
Faeroe Islands	Iceland	Monaco	Switzerland
Finland	Ireland	Netherlands*	United Kingdom*
France*	Isle of Man	Norway	Vatican City

*Major agricultural pesticide markets.

Source: The Freedonia Group

Table 6 | Countries in Eastern Europe

Albania	Hungary	Romania*
Belarus	Latvia	Russia*
Bosnia and Herzegovina	Lithuania	Serbia
Bulgaria	Macedonia	Slovakia
Croatia	Moldova	Slovenia
Czech Republic	Montenegro	Ukraine*
Estonia	Poland*	

* Major agricultural pesticide markets.

Source: The Freedonia Group

Sources

Agricultural Pesticides: Europe (FE35080) is based on *Global Agricultural Pesticides*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and nongovernmental organizations
- trade associations and their publications
- the business and trade press

- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 7 | HS Codes Related to Agricultural Pesticides

HS Code	Definition
3808.91	Insecticides
3808.92	Fungicides
3808.93	Herbicides, anti-sprouting products and plant-growth regulators
3808.99	Other pesticides

Source: United Nations Statistics Division

Table 8 | NACE Codes Related to Agricultural Pesticides

NACE Code	Definition
20.20	Manufacture of pesticides and other agrochemical products

Source: European Commission

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis,

end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Resources

The Freedonia Group

Global Agricultural Pesticides

Freedonia Industry Studies

Global Agricultural Equipment

Global Fertilizers

Global Power Lawn & Garden Equipment

Home & Garden Pesticides

Lawn & Garden Consumables

Lawn & Garden Consumer Insights: The Home Gardener

Lawn & Garden Fertilizers

Lawn & Garden Mulch

Lawn & Garden Seeds

Lawn Mowers

Power Lawn & Garden Equipment

Freedonia Focus Reports

Agricultural Equipment: Europe

Fertilizers: United States

Field Crop Seeds: United States

Peat: United States

Perlite & Vermiculite: United States

Pesticides: Canada

Pesticides: Europe

Pesticides: United States

Phosphate Rock: United States

Power Lawn & Garden Equipment: Europe

Freedonia Custom Research

Trade Publications

Ag-News

AgWeb

C&EN

Chemical Week

Chemistry World

CropLife

ICIS

Agencies & Associations

Beyond Pesticides

CropLife International

European Environment Agency

Eurostat

Food and Agriculture Organization of the United Nations

International Monetary Fund

National Pest Management Association

Organisation for Economic Co-operation and Development

Pesticide Action Network

Soil Association

United Nations Comtrade

World Bank