

Indian Crop Protection Chemicals Market

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Market Overview

Indian Crop Protection Chemicals Market Rebounds on the Back of Improved Export Competency

Shaking off the negative growth rates of the last few years, the Indian crop protection chemicals market notched up a compound annual growth rate of 7.5 percent. This is mainly due to the consistent supply and value gain over Chinese manufacturers in the export market and emerging application segments. India is finally poised to compete on par with China, despite the latter's low-priced goods, as Chinese production costs are on the rise. India has raised the level of its export competency with a consistent quality and supply record and possession of a vast unexplored market. Chemicals manufacturers have targeted product awareness campaigns at Indian farmers, as the country's affordability has increased with the cultivation of high-value crops. "The per capita consumption of pesticides in India is still very low compared to the developed countries and manufacturers need a smart 'get to market' strategy to achieve better reach and acceptance of products," says the analyst of this research. "The demand will also be driven by the rising food grain demand and increasing awareness about pesticide usage among the farmer community."

Such favorable market factors have sustained and even consistently increased the profitability of manufacturers despite the rising prices of raw materials. The herbicides and the fungicides segments are growing much faster than the insecticides segment, which has slowed down considerably because of the introduction of new plant varieties with lower pest infestations. Synthetic chemicals will continue to rule the roost in the chemical pesticide market, since the development of eco-friendly pesticides and new approaches such as organic farming and integrated pest management (IPM) will take more than a decade to gain a foothold in the chemical pesticide market. The Indian market appears lucrative for all types of manufacturers, considering there is no clear market leader, as even the company with the maximum revenues has only 17 percent of the market share.

Holistic Approach Vital to Remain Competitive in the Market

To maintain their stakes in the market, chemicals manufacturers have to align their products with the agriculture cycle and provide holistic solutions with innovative products. Process improvisation is expected to improve profit margins and help the company gain a greater influence on the export market. The future of the industry lies with companies that can provide solutions for the entire gamut of the food supply chain management by integrating crop production with protection. "Understanding the end-user needs and working more strongly on the backward as well as vertical integration is the need of the hour," notes the analyst. "Further, controlling major inputs, setting up efficient distribution services, and adopting international practices relating to crop management will enable Indian companies to carve a niche for themselves."

The market shares are almost equally divided between both multinationals and Indian companies. While the multinationals benefit from their improvised products, the Indian companies leverage their strong distribution set up. Indian companies still trail their foreign counterparts in R&D because of the level of investments required and the demanding regulatory framework. In this scenario, the rapid rates of mergers and acquisitions are likely to persist for a few more years. However, post 2014, it will become crucial for Indian companies to shed their generic manufacturer image and venture into new molecular discovery as well as optimize the registration procedures.

Expert Frost & Sullivan analysts thoroughly examine the following market sector in this research:

- Domestic

- Export
- Technologies

The following technologies are covered in this research:

- Insecticides
- Fungicides
- Herbicides
- Biopesticides

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