Agricultural Surfactants Market Assessment, By Type [Anionic Surfactants, Cationic Surfactants, Nonionic Surfactants, Amphoteric Surfactants], By Substrate [Synthetic, Bio-based], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Application [Herbicides, Fungicides, Insecticides, Others], By Region, Opportunities and Forecast, 2017-2031F

Market Report | 2024-09-30 | 222 pages | Market Xcel - Markets and Data

AVAILABLE LICENSES:

- Single User License $4500.00
- Muti-User/Corporate Licence $5700.00
- Custom Research License $8200.00

Report description:

Global agricultural surfactants market is projected to witness a CAGR of 6.86% during the forecast period 2024-2031, growing from USD 1.75 billion in 2023 to USD 2.97 billion in 2031. The market is expected to grow due to ever-increasing needs for eco-friendly farming methods and advanced crop protection systems. Agrochemical applications are mainly supplemented with agricultural surfactants to enhance their spreading, wetting, and emulsifying characteristics, thus boosting their effectiveness in herbicides, fungicides, and insecticides. Places with little arable land available or food security challenges use these substances for higher yields from crops grown and more efficient pest control practices.
Reasons for the growth of the market include rising food demand due to increased population and a shift towards sustainable agriculture. In addition, environmentally friendly bio-based surfactants have been gaining momentum as they are derived from renewable sources. Nevertheless, the market may face some challenges in its expansion due to environmental concerns associated with chemical surfactants and regulatory constraints.
Major players are persistently investing in research and development projects to develop surfactant products that are both efficient and sustainable. The market is forecasted to record a high growth rate, especially in Asia-Pacific and North America, during the forecast years, with firms setting up new production units in foreign nations, localizing their work, saving expenses, and serving better market needs. For instance, in May 2024, holding a good customer-base in Slovakia, Evonik Industries AG officially opened its new sustainable biosurfactant facility in the country. It is the first facility worldwide to manufacture rhamnolipid biosurfactants on an industrial scale. Applications, including agriculture, hold great opportunities for sustainable biosurfactants,

leading to market growth.

Growing Emphasis on Sustainable Agricultural Practices Catalyzes Market Expansion

A major driver for the growth of the agricultural surfactants market is the shift toward sustainable farming. With rising environmental concerns, farmers are more frequently turning toward eco-friendly practices to reduce the negative impacts of conventional farming on ecosystems. This shift is motivated by the desire for minimized chemical runoff, reduced greenhouse gas emissions, and improved soil health. Consequently, bio-based surfactants from renewable sources, including plant oils and sugars, have become popular.

The synthetic methods for the production of surfactants are more harmful than biodegradable methods due to mild toxicity towards the environment and similar or better capabilities than their synthetic counterparts. This connects well with the global approaches that seek to enforce environmentally friendly agricultural practices through projects, such as the European Green Deal or sustainable development goals (SDGs) aimed at minimizing unsafe farming inputs. Consequently, leading corporations, such as BASF SE and Bayer AG, are channeling funds into bio-based surfactants development so as to address these demands, ultimately influencing the market growth.

Apart from the ecological advantages, sustainable agricultural practices enhance the long-term fertility of soils and the resilience of crops, thereby positioning biosurfactants as essential instruments in contemporary farming.

In January 2024, Bionema Group launched Soil-Jet BSP100, a biodegradable surfactant for the agricultural sector. The product features the patented Polyether-Modified Polysiloxane technology and maximizes the use of water and nutrients, fights soil water resistance, and produces the perfect atmosphere for healthy plant growth by utilizing the power of biodegradable surfactants.

Reduction in Available Arable Land Fuel the Market Growth

Loss of arable land is one of the key components for pushing the growth of the agricultural surfactants market. In fact, in some countries with fast urbanization, industrialization, and infrastructural development, the amount of land used for farming purposes has reduced drastically, especially in Asia and North America. For instance, China recorded a decrease of more than 5% in its arable land between 2013 and 2019. Therefore, farmers are under strong pressure to enhance their yield on small parts of land. Agricultural surfactants play a pivotal role in meeting this challenge by increasing the efficacy of agrochemicals such as herbicides and fertilizers. They increase the absorption, spreading, and penetration of these chemicals, thereby enabling farmers to realize higher yields with minimal resource input. Consequently, surfactants help to enhance crop production on small land sizes, hence they are essential in contemporary agricultural practices.

The use of surfactants and other crop enhancing technologies is being promoted by governments as well as agricultural organizations to increase land productivity, especially in countries where food security is precarious. Capitalizing on the opportunity, in January 2024, Nouryon launched its latest surfactant, Berol Nexus, which is a multifunctional hydrotrope. It is easily formed into a range of cleaning applications due to its low color and viscosity profile. It is available as an aqueous liquid at 70% concentration.

Application to Herbicides Significantly Attributes to the Market Growth

Herbicides employ agricultural surfactants, playing a significant role in propelling the market growth. They are widely used to control weeds that compete with crops for nutrients, water, and sunlight. The effectiveness of herbicides is enhanced by surfactants through improved spreading, sticking, and penetration properties. Enhanced herbicide retention on crop surfaces ensures uniform coverage and better absorption into plant tissues resulting in efficient weed control.

However, nonionic surfactants are mostly used in herbicides as they do not interact with water and still remain active over different environmental circumstances. The need for high performance herbicides with supporting surfactants has risen due to mounting pressure on farmers to increase plant production capacity on available cultivable land.

The rising popularity of precise agriculture practices aimed at maximizing the use of inputs, such as herbicides, has influenced the use of surfactants. These substances aid in better application of herbicides thereby minimizing wastage as well as environmental pollution. As a result, surfactants have become very important in modern farming, enhancing the market growth.

In June 2024, with its proprietary MICROBILIZE technology, Meristem Crop Performance launched the surfactant, EXCAVATOR AMS, a new and more user-friendly version of EXCAVATOR that breaks down residue and covers crops more quickly, releases nutrients speedily, requires less work, and increases the effectiveness of herbicide treatments. The first all-in-one surfactant, water conditioner, residue breakdown, and nutrient release solution includes ammonium sulfate (AMS) in the new formulation.

Europe Holds a Substantial Market Share

With rising demand for sustainable farming solutions, strict environmental regulations have played a significant role in driving Europe's market share of global agricultural surfactants. Moreover, European countries are at the forefront of implementing eco-friendly agricultural practices that have resulted in an upsurge of bio-based surfactants aligned with the EU Green Deal and sustainable agriculture goals. These regulations aim at encouraging surfactants use that improves efficacy with respect to diminished agricultural chemicals input, hence minimizing harmful chemicals released into the environment.

Furthermore, the regional market is supported by agriculture sector that has been well established in the European countries such as Germany, France, and Spain. In addition, surfactants are extensively used to enhance the performance of herbicides, insecticides, and fungicides which are crucial for high crop yields in small arable lands.

Moreover, the growing demand for surfactants that fine-tune agrochemicals in accordance with the government initiatives is promoted by the rising application of precision agricultural techniques. The European market will be driven by sustainability and innovation in bio-surfactants over the forecast years.

In February 2023, Pangaea Biosciences Ltd. developed a unique method for preparing plant-based surfactants to protect soil health and biodiversity. These surfactants are able to minimize the impact of hazardous surfactants, lower chemical loading, and drastically cut down on dose rate application.

Future Market Scenario (2024 – 2031F)

- With growing environmental issues and increasing regulatory demands, it is anticipated that there will be a significant shift in the market towards green and bio-based surfactants.
- Precision farming technology is expected to be essential for the optimization of agrochemicals in conjunction with agricultural surfactants. Such integrations would lead to increased efficacy, decreased losses, and enhanced yields, accelerating market growth.
- Countries located in Asia-Pacific are anticipated to be vital markets for growth as a result of the increasing food requirement, growing surfactant awareness, and rising adoption of modern farming methodologies.

Key Players Landscape and Outlook

The agricultural surfactants market is characterized by strong competition, with numerous key players focusing on innovation and sustainability. Leading companies in the market are prioritizing the development of bio-based surfactants in response to rising environmental concerns and regulatory pressures. These eco-friendly solutions are becoming increasingly popular as they help reduce the ecological impact of conventional agrochemicals. For instance, in February 2022, Clariant AG launched its polyethylene glycols (PEGs) and entirely bio-based surfactants to combat climate change, expanding the company's list of Vita-designated compounds. Vita products have a minimum 98% renewable carbon index (RCI) and are made from renewable feedstocks.

The competitive landscape is marked by significant investments in research and development to enhance surfactant performance and efficiency. Players are expanding their operations into emerging markets such as Asia-Pacific, where the demand for agricultural inputs is rising due to population growth and food security challenges.

Strategic initiatives such as partnerships, mergers, and acquisitions are common as companies seek to strengthen their global presence and capitalize on the growing trend towards sustainable agriculture. The outlook for the market remains positive, with continued innovation and regional expansion expected to drive growth in the forecast years.

Table of Contents:

6.3.2.Canada
6.3.3.Mexico
*All segments will be provided for all regions and countries covered
7.Europe Agricultural Surfactants Market Outlook, 2017-2031F
7.1.Germany
7.2.France
7.3.Italy
7.4.United Kingdom
7.5.Russia
7.6.Netherlands
7.7.Spain
7.8.Turkey
7.9.Poland
8.Asia-Pacific Agricultural Surfactants Market Outlook, 2017-2031F
8.1.India
8.2.China
8.3.Japan
8.4.Australia
8.5.Vietnam
8.6.South Korea
8.7.Indonesia
8.8.Philippines
9.South America Agricultural Surfactants Market Outlook, 2017-2031F
9.1.Brazil
9.2.Argentina
10.Middle East and Africa Agricultural Surfactants Market Outlook, 2017-2031F
10.1.Saudi Arabia
10.2.UAE
10.3.South Africa
11.Demand Supply Analysis
12.Value Chain Analysis
13.Porter's Five Forces Analysis
14.PESTLE Analysis
15.Macro-economic Indicators
16.Pricing Analysis
17.Profit Margin Analysis
18.Market Dynamics
18.1.Market Drivers
18.2.Market Challenges
19.Market Trends and Developments
20.Case Studies
21.Competitive Landscape
21.1.Competition Matrix of Top 5 Market Leaders
21.2.Company Ecosystem Analysis (Startup v/s SME v/s Large-scale)
21.3.SWOT Analysis for Top 5 Players
21.4.Key Players Landscape for Top 10 Market Players
21.4.1.Corteva Agriscience

*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

Agricultural Surfactants Market Assessment, By Type [Anionic Surfactants, Cationic Surfactants, Nonionic Surfactants, Amphoteric Surfactants], By Substrate [Synthetic, Bio-based], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Application [Herbicides, Fungicides, Insecticides, Others], By Region, Opportunities and Forecast, 2017-2031F

Market Report | 2024-09-30 | 222 pages | Market Xcel - Markets and Data

To place an Order with Scotts International:

- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4500.00
	Muti-User/Corporate Licence	$5700.00
	Custom Research License	$8200.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	

Address*		City*	
Zip Code*		Country*	
		Date	2025-06-24
		Signature	