

SDHI Fungicides Market Assessment, By Type [Boscalid, Fluopyram, Penthiopyrad, Isofetamide, Others], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-01-09 | 223 pages | Market Xcel - Markets and Data

AVAILABLE LICENSES:

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

Report description:

Global SDHI fungicides market is projected to witness a CAGR of 7.80% during the forecast period 2025-2032, growing from USD 2.98 billion in 2024 to USD 5.43 billion in 2032. The market is expanding significantly since there has been a growing need for better solutions to combat crop diseases and improve agricultural yield. Succinate-dehydrogenase-inhibitor (SDHI) fungicides and block fungal respiration preserve high-quality crops such as cereals, fruits, vegetables, and oilseeds. Due to the increasing incidence of powdery mildews, rusts, and blights, there has been much demand for SDHI fungicides with profound broad-spectrum activity and longer residual effects. In addition, the increasing world population, coupled with rising food demand, has further enhanced the focus of research towards maximizing the yield and quality of crops, encouraging the adoption of SDHI fungicides. Enhanced effectiveness and improved spectrum of SDHI products, which farmers accept well, is the outcome of technological advancement in formulation development, including co-formulations with other fungicidal classes. In addition, stringent regulatory frameworks motivated by environmentally sustainable and low-residue solutions have further supported the farmers' switch to SDHI rather than conventional methods. Asia-Pacific has become a crucial new market for SDHI fungicides, with its large areas under cultivation and increasing awareness of modern farming practices.

Common obstacles, such as the development of resistance to fungicides and restrictions set by governments regarding the use of chemicals, can affect the market adversely. However, constant innovation in product development while increasingly focusing on sustainable agriculture significantly enhances the market for SDHI fungicides.

In July 2024, Syngenta Crop Protection AG launched its latest fourth-generation foliar, SDHI fungicide (Group 7), MIRAVIS Flexi, to safeguard barley yields from *Ramularia* leaf spot and scald. The fungicide is powered by ADEPIDYN technology. When MIRAVIS Flexi is sprayed on the leaf, it slowly passes through the xylem and protects the entire leaf toward the tip. It protects the yield-building leaves longer from the damaging effects of disease and, therefore, keeps the canopy alive and enhances yields. Growing Prevalence of Fungal Diseases Catalyzes Market Expansion

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The increasing incidence of fungal diseases in crops propels the global market of SDHI fungicides. The impact of climate change, in conjunction with the intensification of agricultural practices, has given rise to conducive conditions for the growth and spreading of fungi, such as powdery mildew, rust, and blight. These diseases adversely affect crop yield and quality, resulting in huge losses for farmers worldwide.

SDHI fungicides are substances that inhibit respiration in fungi by blocking the enzyme- succinate dehydrogenase, and are, therefore, effective in managing these diseases by controlling them. They also act as broad-spectrum agents with much longer activity persistence; hence, they rank among preferred active ingredients to give comprehensive control of various fungal infections. For instance, in July 2023, UPL Limited launched its latest botryticide, Kenja, with the active ingredient isofetamid, which is an SDHI fungicide. Isofetamid makes a part of the completely different chemical group (phenyl-oxo-ethyl thiophene amide) of the SDHI action group mode. Isofetamid possesses a new molecular structure that keeps the active ingredient effective against several fungal isolates resistant to other SDHI fungicides.

Hence, with increasing food demand worldwide, farmers and agricultural professionals have shifted to adopting newer fungicides for higher yield and crop health, making SDHI fungicides a very important input in modern agriculture.

Sustainable Agriculture Trend Influences the Market Growth

The increasing attention towards sustainable agricultural practices is another key factor stimulating the global SDHI fungicides market. Since consumers are aware and increased regulatory scrutiny is driving interest among agricultural producers, there is all the more reason to be a part of the action and demand for effective, environmentally friendly solutions for crop protection. As their application rates are low and action is targeted against disease, SDHI fungicides are in line with sustainability goals by lowering the environmental impact.

These fungicides help in reducing chemical residues in food products and are compatible with integrated pest management (IPM) strategy. Moreover, governments and agriculture organizations worldwide advocate for sustainable farming practices among farmers and promote all favorable conditions for highly innovative advanced fungicides. In fact, in October 2023, Bayer AG received regulatory approval for the active substance of its new fungicide and the first product to contain it. The Chemicals Regulation Division (CRD) of the Health & Safety Executive (HSE) approved the active substance isoflucypram. It granted simultaneous authorization for Vimoy, the first product to contain the new fungicide active substance. Isoflucypram, known as 'Iblon' in the market, represents an innovation in SDHI fungicides, delivering unrivaled broad-spectrum activity against the primary foliar diseases of wheat, including yellow rust, brown rust, and Septoria tritici while giving quite a useful activity against stem-based diseases such as eyespot.

The demand for SDHI fungicides will increase as the agricultural industry continues its drive toward greener practices because they offer a critical underpinning in both productivity and sustainability.

Cereals and Grains Hold a Significant Market Share

Cereals and grains are an important part of the global SDHI fungicides market. They are indispensable because they form the basis of food security and are most likely the crops affected by fungal disease. Major cereals, such as wheat, rice, and maize, have a large share of the population under their staples and, therefore, highly necessitate their protection for a continuous food supply. Fungal pathogens such as rust, blight, and mildew are potentially detrimental to the yield and quality of these crops. SDHI fungicides have a broader range of activities and targeted actions to help control these diseases systematically, therefore providing a conducive environment for crop health and productivity. Many farmers use SDHI fungicides to improve the durability and quality of grains after harvest, particularly in regions with high disease pressure.

In November 2022, FMC Corporation launched its latest fungicide, Adastrio, which combines three action modes and belongs to the SDHI class of fluindapyr. The fungicide can be used for corn, grain wheat, sorghum, triticale, and barley for controlling anthracnose leaf blight, gray leaf spot, common rust, Southern rust, and Northern corn leaf blight. It has been developed for broad-spectrum control of major foliar diseases and to protect yield potential through harvest.

Europe Dominates the Market

Europe is the biggest market globally regarding SDHI fungicides, as advanced agricultural practices and strict regulations are exercised in this area to opt for sustainable farming practices. The continent also produces high-value crops like cereals, fruits, and vegetables that can be infected with rust or blight diseases. Many farmers adopt SDHI fungicides because of their potential for broad-spectrum efficacy as well as environmental compatibility. Moreover, regulations in the European Union tend to favor

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

low-residue products, thus boosting demand. The commitment of Europe towards sustainability in agriculture and high-quality food production makes the region the leading player in the SDHI fungicides market.

In April 2024, Adama Agricultural Solutions Limited launched a new broad-spectrum T2 fungicide, Avastel, for cereal growers across Europe. It brought a new standard for efficacy, control, and long-lasting protection against a broad range of diseases. Avastel combines two active ingredients, carboxamide (SDHI) and triazole (DMI), to deliver control of Septoria, Yellow Rust, Brown Rust, Net Blotch, and several other diseases in different cereals. It uses the company's Asorbital Formulation Technology for improved uptake and rapid dissemination within leaf tissue, thus ensuring greater wash-out resistance and superior retention to offset uncertainties from the weather during spray periods.

Future Market Scenario (2025 – 2032F)

□ Increased adoption of SDHI fungicides to protect staple crops and guarantee food security is expected due to an increasing population and rising demand for food worldwide.

□ To expand the efficacy and application spectrum of SDHI fungicides, novel formulations and co-formulations with other fungicides are likely to be developed.

□ The emergence of resistance in fungi will necessitate future research into advanced SDHI molecules.

Key Players Landscape and Outlook

The SDHI fungicides market has a highly competitive landscape with many important players involved in product innovation, partnerships with various stakeholders, and geographical expansion. Companies invest substantially in R&D to develop effective SDHI fungicides, broaden their application range, and improve resistance management. The market also witnesses synergistic efforts between agrochemical manufacturers and agricultural research institutions to provide suitable, modern solutions to satisfy different crop requirements.

The future for the SDHI fungicides market is quite bright, with the increasing international demand for food, the ever-increasing incidence of fungal diseases, and the increased emphasis being placed on sustainable agriculture. Companies are adapting to regulatory restrictions by putting their primary emphasis on low-residue, eco-friendly products in tune with modern agricultural practices. As emerging markets show higher adoption rates, key players are targeting these regions for expansion. Additionally, the integration of SDHI fungicides into Integrated Pest Management (IPM) systems is expected to boost market growth further, offering an opportunity for companies to strengthen their market positions and meet the evolving needs of farmers worldwide.

Table of Contents:

1. □ Project Scope and Definitions
2. □ Research Methodology
3. □ Executive Summary
4. □ Voice of Customer
 - 4.1. □ Demographics (Income - Low, Mid and High; Geography; Nationality; etc.)
 - 4.2. □ Market Awareness and Product Information
 - 4.3. □ Brand Awareness and Loyalty
 - 4.4. □ Factors Considered in Purchase Decision
 - 4.4.1. □ Efficacy
 - 4.4.2. □ Cost
 - 4.4.3. □ Environmental Impact
 - 4.4.4. □ Safety and Toxicity
 - 4.4.5. □ Regulatory Compliance
 - 4.4.6. □ Application Ease
 - 4.4.7. □ Residue Levels
 - 4.4.8. □ Compatibility with Other Products
 - 4.4.9. □ Resistance Management
 - 4.4.10. □ Crop Suitability
 - 4.4.11. □ Brand Reputation

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.4.12. □ Availability and Supply Chain Reliability
 - 4.4.13. □ Sustainability and Eco-friendliness
 - 4.4.14. □ Performance Under Varying Climatic Conditions
 - 4.4.15. □ Technological Innovation in Formulations
 - 4.5. □ Purchase Channel
 - 4.6. □ Frequency of Purchase
 - 4.7. □ Existing or Intended User
 - 5. □ Global SDHI Fungicides Market Outlook, 2018-2032F
 - 5.1. □ Market Size Analysis & Forecast
 - 5.1.1. □ By Value
 - 5.1.2. □ By Volume
 - 5.2. □ Market Share Analysis & Forecast
 - 5.2.1. □ By Type
 - 5.2.1.1. □ Boscalid
 - 5.2.1.2. □ Fluopyram
 - 5.2.1.3. □ Penthiopyrad
 - 5.2.1.4. □ Isofetamide
 - 5.2.1.5. □ Others
 - 5.2.2. □ By Crop Type
 - 5.2.2.1. □ Cereals and Grains
 - 5.2.2.2. □ Oilseeds and Pulses
 - 5.2.2.3. □ Fruits and Vegetables
 - 5.2.2.4. □ Others
 - 5.2.3. □ By Region
 - 5.2.3.1. □ North America
 - 5.2.3.2. □ Europe
 - 5.2.3.3. □ Asia-Pacific
 - 5.2.3.4. □ South America
 - 5.2.3.5. □ Middle East and Africa
 - 5.2.4. □ By Company Market Share Analysis (Top 5 Companies and Others - By Value, 2024)
 - 5.3. □ Market Map Analysis, 2024
 - 5.3.1. □ By Type
 - 5.3.2. □ By Crop Type
 - 5.3.3. □ By Region
6. □ North America SDHI Fungicides Market Outlook, 2018-2032F*
 - 6.1. □ Market Size Analysis & Forecast
 - 6.1.1. □ By Value
 - 6.1.2. □ By Volume
 - 6.2. □ Market Share Analysis & Forecast
 - 6.2.1. □ By Type
 - 6.2.1.1. □ Boscalid
 - 6.2.1.2. □ Fluopyram
 - 6.2.1.3. □ Penthiopyrad
 - 6.2.1.4. □ Isofetamide
 - 6.2.1.5. □ Others
 - 6.2.2. □ By Crop Type
 - 6.2.2.1. □ Cereals and Grains

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.2.2.2. Oilseeds and Pulses
 - 6.2.2.3. Fruits and Vegetables
 - 6.2.2.4. Others
 - 6.2.3. By Country Share
 - 6.2.3.1. United States
 - 6.2.3.2. Canada
 - 6.2.3.3. Mexico
 - 6.3. Country Market Assessment
 - 6.3.1. United States SDHI Fungicides Market Outlook, 2018-2032F*
 - 6.3.1.1. Market Size Analysis & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.1.2. By Volume
 - 6.3.1.2. Market Share Analysis & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.1.1. Boscalid
 - 6.3.1.2.1.2. Fluopyram
 - 6.3.1.2.1.3. Penthiopyrad
 - 6.3.1.2.1.4. Isofetamide
 - 6.3.1.2.1.5. Others
 - 6.3.1.2.2. By Crop Type
 - 6.3.1.2.2.1. Cereals and Grains
 - 6.3.1.2.2.2. Oilseeds and Pulses
 - 6.3.1.2.2.3. Fruits and Vegetables
 - 6.3.1.2.2.4. Others
 - 6.3.2. Canada
 - 6.3.3. Mexico
- *All segments will be provided for all regions and countries covered
- 7. Europe SDHI Fungicides Market Outlook, 2018-2032F
 - 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 SDHI Fungicides Market Outlook, 2018-2032F
 - 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 SDHI Fungicides Market Outlook, 2018-2032F

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 9.1. □Brazil
 - 9.2. □Argentina
 - 10. □Middle East and Africa SDHI Fungicides Market Outlook, 2018-2032F
 - 10.1. □Saudi Arabia
 - 10.2. □UAE
 - 10.3. □South Africa
 - 11. □Regulatory Landscape
 - 12. □Demand Supply Analysis
 - 13. □Import and Export Analysis
 - 14. □Value Chain Analysis
 - 15. □Porter's Five Forces Analysis
 - 16. □PESTLE Analysis
 - 17. □Macro-economic Indicators
 - 18. □Pricing Analysis
 - 19. □Profit Margin Analysis
 - 20. □Market Dynamics
 - 20.1. □Market Drivers
 - 20.2. □Market Challenges
 - 21. □Market Trends and Developments
 - 22. □Case Studies
 - 23. □Competitive Landscape
 - 23.1. □Competition Matrix of Top 5 Market Leaders
 - 23.2. □Company Ecosystem Analysis (Startup v/s SME v/s Large-scale)
 - 23.3. □SWOT Analysis for Top 5 Players
 - 23.4. □Key Players Landscape for Top 10 Market Players
 - 23.4.1. □Syngenta Crop Protection AG
 - 23.4.1.1. □Company Details
 - 23.4.1.2. □Key Management Personnel
 - 23.4.1.3. □Products and Services
 - 23.4.1.4. □Financials (As Reported)
 - 23.4.1.5. □Key Market Focus and Geographical Presence
 - 23.4.1.6. □Recent Developments/Collaborations/Partnerships/Mergers and Acquisition
 - 23.4.2. □BASF SE
 - 23.4.3. □Bayer AG
 - 23.4.4. □Corteva Agriscience
 - 23.4.5. □FMC Corporation
 - 23.4.6. □UPL Limited
 - 23.4.7. □Adama Agricultural Solutions Limited
 - 23.4.8. □Nufarm Limited
 - 23.4.9. □Ishihara Sangyo Kaisha, Ltd.
 - 23.4.10. □Valent U.S.A. LLC
- *Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.
24. □Strategic Recommendations
25. □About Us and Disclaimer

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

SDHI Fungicides Market Assessment, By Type [Boscalid, Fluopyram, Penthiopyrad, Isofetamide, Others], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-01-09 | 223 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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-05"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Signature

An empty rectangular box with a thin black border, intended for a signature.