

**Glyphosate Market Assessment, By Crop Type [Genetically Modified, Conventional],  
By Form [Dry, Liquid], By Application [Cereals and Grains, Oilseeds and Pulses, Fruits  
and Vegetables, Others], By Region, Opportunities and Forecast, 2018-2032F**

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**Report description:**

Global glyphosate market is projected to witness a CAGR of 5.72% during the forecast period 2025-2032, growing from USD 9.51 billion in 2024 to USD 14.84 billion in 2032. It is an important part of the agricultural industry, as glyphosate has proved to be a popular herbicide for weed control and maximizing crop production. It is a broad-spectrum, non-selective herbicide used widely on crops, including corn, soybeans, cotton, and wheat, making it one of the most important herbicides. The market, due to the increasing global population, demand for food, and need for agricultural efficiency, will experience increased growth.

In recent times, glyphosate-resistant genetically modified crops have further escalated their demand in several countries. For instance, in July 2024, Bayer Australia launched its herbicide-tolerant variant of cotton, XtendFlex cotton, in Australia. The launch aimed to provide improved weed control flexibility to growers through tolerance to glyphosate, glufosinate, and dicamba. However, the market faces challenges, including intensifying environmental concerns, increased regulatory scrutiny, and organic farming. Prominent trends include the development of bio-based alternatives and integrated weed management practices.

Asia-Pacific is the most active region because of the high agricultural activities. North America also contributes enormously. Despite the controversies and legal restrictions, glyphosate remains the first choice of most farmers as it is cheap and very effective. However, market flow is expected to take a new direction in the coming years due to evolving regulations and growing public awareness.

**Adoption of Genetically Modified (GM) Crops Catalyzes Market Expansion**

Genetically modified (GM) crops that are tolerant to glyphosate are one of the major factors responsible for the booming global glyphosate market. Engineering crops against the broad-spectrum herbicide to eliminate weeds enables the farmers to manage weeds without directly affecting the main crops. This biotechnology is gaining ground in many developed and developing countries. GM crop commodities such as soybeans, corn, and cotton are grown on a large scale in larger economies. By using glyphosate-resistant crops, enhanced operability is gained since one herbicide could be spray-as-needed over one field without

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having to go over the whole area with different chemicals, therefore cutting costs and reducing manual labor. Also, enhanced weed control thus leads to increased yield, addressing the need for food, given the growing demand for food due to a rapidly populating world. Considering the need of the hour, in March 2024, Ghana's National Biosafety Authority (NBA) approved 14 new biotechnology products for commercialization. The new genetically engineered products include eight corn and six soybean varieties.

However, debates on issues of environmental sustainability due to herbicide resistance are influencing regulations. However, despite all these debates, the adoption of GM continues to add to the demand for glyphosate, especially in areas where agricultural efficiency is emphasized.

#### Growing Demand for Glyphosate in Emerging Economies Influences the Market Growth

Emerging markets, especially the Asia-Pacific and South American regions, show steadily increasing demand for glyphosate. These regions are undergoing accelerated agricultural development owing to the increases in the human population and urbanization and the demands for food security. Investments are evident in countries such as India, China, and Brazil, which heavily invest in modernizing agricultural practices so that productivity can increase for local and export markets. One such practice involving glyphosate is the cost-effective means of weed management, a major challenge to large-scale farming. Farmers in the region rely on glyphosate because of its all-herbicide effect on crop yields and reduced labor work. On the other side, mechanization and intensive farming have increased glyphosate use because it makes weed management easier and less soil disturbing. Governments in these economies also provide financial and capacity-building support to modernize agriculture in the form of subsidized training courses to encourage efficient herbicides like glyphosate. In order to further amend the Insecticides Rules, 1971, the Ministry of Agriculture of India notified the Insecticides (Sixth Amendment) Rules, 2023. As per the amendment, when applying for a license, pest controllers who use only glyphosate and its derivatives in their operations must complete a training program designed specifically for glyphosate usage from a list of institutions. All applicants must complete the 15-day training in order to obtain their training certificate.

#### Liquid Form Holds the Dominant Market Share

The liquid form of glyphosate dominates all the glyphosate formulations, primarily due to its superb efficacy, application convenience, and adaptability to different farming practices. It makes sense that most farmers prefer these forms because they ensure better coverage and deep penetration of weeds in a wide variety of crops and conditions. These are more compatible with spraying equipment and thus favorable for large-scale agriculture. For instance, New Roundup PowerMAX 3 Herbicide by Bayer AG enables farmers to spray more acres per gallon due to a special surfactant combination that has a greater glyphosate concentration per gallon.

Moreover, the ability to mix with other agricultural inputs, like fertilizers and herbicides, further enhances its performance. Liquid glyphosate is commonly used in the Asia-Pacific for crops like soybeans, corn, and wheat that are grown using intensive farming practices. Fast and reliable across a wide variety of climatic conditions, it can be used safely for pre- and post-emergence weed control. Liquid formulations also save time and labor compared to solid forms in line with modern agricultural practices. Liquid glyphosate is used in spite of strict regulations because of the valid environmental and health concerns associated with it. Therefore, liquid glyphosate is much appreciated for its convenience and effectiveness in addressing the increasing demand for efficient weed control solutions.

#### Asia-Pacific Being the Fastest Growing Market

Asia-Pacific is the fastest-growing market for glyphosate, driven by expanding agricultural activities, rising food demand, and increasing adoption of modern farming practices. Rapidly growing populations in countries of this region necessitate increased agricultural productivity for food security, increasing the demand for efficient weed-management solutions, such as glyphosate. Such fast-growing countries include China, India, and many Southeast Asian nations due to their massive agricultural outputs and need to improve crop yields. The Institute Control of Agrochemicals, Ministry of Agricultural and Rural Affairs (ICAMA) of the Chinese Ministry of Agriculture and Rural Affairs declared in March 2024 that it plans to authorize the third round of pesticide registrations in 2024. The glyphosate GM crop herbicides are among the pesticides listed in this round of registrations. Using genetically engineered crops in certain markets, combined with the new mechanized farming trend, further increases the use of glyphosate. Farmers in the region prefer glyphosate for its relatively lower price, ease of application, and wide range of weed control to maximize productivity on limited arable land. Besides, the modernization of agriculture has triggered the use of

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advanced herbicides with accompanying governmental subsidies and training programs.

Despite regulatory challenges, positive and promising economic growth and technological progress toward improving the region's institutional output-level agricultural productivity further make Asia-Pacific the most important impetus for the global glyphosate market.

#### Future Market Scenario (2025 - 2032F)

- Improvements in novel formulations and enhanced application methods seem to make glyphosate more efficient and safer, thereby lengthening the period of its market relevance.
- Increasing environmental worries of modern citizens have inspired consumer preferences for organic farming, which can give rise to bioherbicides and impact glyphosate use patterns.
- Farmers are expected to use integrated weed control practices by applying glyphosate alongside other sustainable techniques to deal with herbicide resistance.

#### Key Players Landscape and Outlook

A competitive landscape in the glyphosate market comprises a number of key players, regional companies, and small start-ups that address increasing international demand. These leading enterprises emphasize high-quality, useful formulations, including liquid and granular types, with the objective of addressing application diversity in agriculture. The strong R&D innovation that propels advanced glyphosate formulation coupled with efficient weed control and minimal environmental concerns will certainly advance the intensifying levels of competitiveness.

Companies are investing in expanding production capacities, especially in the fast-growing regions of Asia-Pacific and South America, due to the increasing agricultural activities in these regions. Partnerships with distributors and strategic collaborations are expected to strengthen the supply chains and expand in emerging markets. For instance, in March 2023, Albaugh LLC acquired the glyphosate business of Corteva Agriscience. With this acquisition, the company aims to increase its global coverage of direct glyphosate DMA salt formulations and registrations.

Investments are also attuned to developments for meeting the rising regulatory scrutiny, as companies tend to come up with more eco-friendly alternatives and integrated weed management solutions.

Glyphosate demand will increase exponentially in the future, as it will also be projected in emerging regions due to increasing food requirements and agricultural mechanization. However, developed markets will show slower growth rates due to increasing regulatory pressures and a shift to sustainable farming. Innovative business models, market diversification, and a competent ability to deal with herbicide resistance will lead to competition in this evolving scenario.

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