

Brazil Agricultural Biologicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Brazil Agricultural Biologicals Market size is estimated at 0.83 billion USD in 2025, and is expected to reach 1.36 billion USD by 2030, growing at a CAGR of 10.34% during the forecast period (2025-2030).

- The crop nutrition segment accounted for 58.2% of the Brazilian agricultural biologicals market in 2022. Organic fertilizers are the most consumed biological inputs in the country.
- Biostimulants accounted for 68.6% of the total crop nutrition segment in 2022, valued at USD 246.9 million. Seaweed extracts dominated the market, valued at USD 143.3 million in 2022. The market value of seaweed extracts is anticipated to reach USD 307.1 million by 2029.
- Crop protection accounted for 41.8% of the Brazilian agricultural biologicals market in 2022. The market share of crop protection products is anticipated to increase by 71.2% and reach USD 489.2 million by 2029. Biopesticides dominated the crop protection segment, accounting for 60.9% in 2022.
- Bioherbicides are the most consumed biopesticides in Brazil, accounting for 38.15% in 2022, followed by biofungicides, other biopesticides, and bioinsecticides, with a market share of 25.6%, 18.4%, and 17.8%, respectively.
- Karen Friederich of the Brazilian Association of Collective Health stated that agrochemicals contaminate approximately 70% of the food consumed by Brazilians. Therefore, the growing awareness about healthy food products with minimal environmental impacts is anticipated to drive the use of biologicals in organic farming across the country between 2023 and 2029.

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The Country's regulatory laws enabled the expansion of organic cultivation.

- The area under organic cultivation of crops in Brazil was recorded at 13,758.7 hectares in 2021, as per the data provided by FibL Statistics. Organic agriculture in Brazil has grown considerably in the last twenty years, mainly due to the creation of specific laws and regulations.
- Between 2015 and 2017, the annual average growth of newly registered organic producers was 43% in Brazil. The Litoral Sul and Baixo Sul ITs, in the country's southern region, had the highest number of registered organic producers in Brazil. From 2018 to 2020, it fell to 4%, coinciding with a new political scenario, which was seen as a landmark in the scope of national agriculture, the end of federal departments responsible for agricultural development, and the expansion and flexibilization of the Brazilian pesticide market.
- Cash crops accounted for the maximum share of 86.3% in terms of organic crop cultivation in 2021, spanning 11,871.6 hectares across Brazil. The country is a significant grower of cash crops like sugarcane, cocoa, coffee, and cotton. The prevalence of cash crops is followed by horticultural crops, which accounted for a 9.3% share with an organic cultivation area of 1,295.9 hectares in 2021. The primary fruit and vegetable crops grown in the country include oranges, carrots, potatoes, bananas, lemons, tangerines, and strawberries.
- Row crops accounted for 4.4% of Brazil's total organic crop cultivation in 2021, with an area of 591.2 hectares. The organic area under cultivation of row crops increased by 17.1% during the historical period. The replacement of chemical nitrogen with organic sources in Brazil has been associated with saving around USD 13.0 billion per annum, which is driving more farmers to take up organic farming of row crops.

As health awareness and income rise, people are spending more on organic food, with olive oil being the top choice

- Organic food consumption in Brazil is mainly observed in the higher-income groups due to the higher prices of organic food. However, increasing disposable incomes and the growing health consciousness among consumers post the COVID-19 pandemic are expected to increase the per capita spending on organic food in the country. The current per capita spending on organic food products in Brazil is comparatively lesser than in other parts of the world, with an average per capita spending of USD 0.38 in 2022.
- Brazil ranked 43rd globally for per capita spending on organic packaged food and beverages, with a value of USD 0.38 in 2021. The market is estimated to record a CAGR of 6.6% between the years 2021 and 2026, according to Global Organic Trade data. Olive oil was the most consumed organic food product in the country.
- Growing awareness among consumers and their buying motives will lead to a better understanding of the sustainability attributes of organic food in the country. Increasing per capita income and growing consumer knowledge about the importance of organic food consumption are expected to increase the per capita spending on organic food products in Brazil over the coming years.
- The retail sales of organic packaged food and beverages in Brazil grew by 9.5% in 2021 to reach a value of USD 81.0 million. This figure is expected to grow further with the penetration of e-commerce within organic packaged food. Additionally, the increasing levels of urbanization and improving consumer living standards have increased the per capita expenditure on

high-quality, organic food products in Brazil. The Brazilian Ministry of Agricultural Development is introducing numerous policies for promoting the domestic production of organic foods, which will drive market growth over the forecast period.

Brazil Agricultural Biologicals Industry Overview

The Brazil Agricultural Biologicals Market is fragmented, with the top five companies occupying 7.90%. The major players in this market are FMC Corporation, Novozymes, Rizobacter, Trade Corporation International and Vittia Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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