Chile Crop Protection Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Chile Crop Protection Chemicals Market size is estimated at USD 465.44 million in 2025, and is expected to reach USD 591.21 million by 2030, at a CAGR of 4.9% during the forecast period (2025-2030).

Chile is one of the largest producers of crops such as grapes, apples, wheat, corn, oats, barley, potatoes, and many others, with an evident high rate of pesticide use compared to other countries owing to a decrease in arable land holding. For instance, as per the World Bank data, the arable land percentage in Chile was 2.0% in 2021 and decreased to 1.7% in 2022, which boosted the demand for crop protection chemicals in the country.

Chile is one the major producers and exporters of various grains and cereal crops, including wheat, maize, barley, rice, and sorghum. The rising cultivation of these crops and infestation of weeds and diseases are driving the consumption of crop protection chemicals. According to the United States Department of Agriculture, the country produced 615,000 metric tons of corn in 2022 which increased to 628,000 metric tons in 2023. This is mainly due to the increased usage of crop protection chemicals, which reduces the losses and increases production. It is focused on improving its domestic production to reduce its reliance on imported corn and wheat. Thus increasing the demand for crop protection chemicals. Insects such as aphids, corn borers, armyworms, grain weevils, and other insects are a major threat to grains and cereals. For instance, Fall armyworms have the potential to reduce corn yields by 25% if not managed timely. Insecticides such as chlorpyrifos, deltamethrin, imidacloprid, cyfluthrin, and others are used to control these pests that can cause significant yield losses.

The crop protection chemicals market is driven by increasing demand for food safety and quality, growing consumer preference for organic products, and supportive government policies promoting biocontrol products. Chile, a pioneer in biopesticide regulations in Latin America, has implemented measures to support biopesticide product commercialization. These include

regulatory incentives for biopesticide product registration and substantial funding for research and development of non-chemical crop protection methods. The country's public-private partnerships develop targeted biopesticides to address market gaps, strengthening biopesticide product demand. In 2023, Chile established the first National Center of Bioinputs (CeNBI) to coordinate the technological development of microbiologically sourced inputs, including biostimulants and biocontrollers. These products address pests, agricultural diseases, and crop stresses caused by climate change. The CeNBI facilities house a Microbial Genetic Resources Bank, which preserves the country's internationally recognized microbial heritage. Moreover, the growing adoption of Genetically Modified Crops (GMOs) is reducing the demand for crop protection chemicals in the market.

Chile Crop Protection Chemicals Market Trends

Rising Frequency of Pest Infestations and Crop Diseases Drives the Demand for Crop Protection Chemicals

Chile's agricultural sector faces significant challenges from pests and diseases that affect its major crops, particularly grapes. The impact on grape production is evident in FAO data, which shows a decline from 793.1 thousand metric tons in 2021 to 724.8 thousand metric tons in 2022. According to the ITC Trade Map, Chile maintains its position as a major global exporter of table grapes, with annual exports reaching 574,930 metric tons, valued at USD 954,111 thousand in 2023. The country serves as the primary supplier of table grapes to the United States and European Union during winter months, with products marketed up to 120 days post-harvest and requiring 15-30 days for overseas transport. Import markets maintain strict quality standards, with a minimal tolerance of 0.5% for decay in shipments.

The grape industry faces multiple disease challenges throughout its growth cycle, including grapevine trunk diseases (GTDs), cancer disease, dieback, and powdery mildew. According to the United States Department of Agriculture, disease outbreaks in 2022 affected several wine-producing regions, with distribution across Maule (37.94%), O'Higgins (32.81%), Bio Bio (10.65%), Metropolitana (9.2%), and Valparaiso (7.1%). The high incidence and severity of these diseases significantly impact vineyards in Central Chile, making early disease management essential for maintaining crop health and yield levels. These ongoing challenges are projected to increase the demand for crop protection chemicals in Chile.

Botrytis infection in vineyard berries creates persistent spore sources when infected grapes dry at harvest. The fungus develops lateral growths within the grape, releasing enzymes that break down the cellular adhesion between grape tissues. Initially spreading between the skin and pulp, the fungus eventually penetrates and deteriorates the pulp itself. The resulting berry cracks become sites of spore production, facilitating the spread of gray mold across grape clusters. The impact on stored table grapes is particularly severe, as Botrytis can continue its growth during storage, forming gray-white fungal colonies. When powdery mildew infects berries before full development, it kills epidermal cells and inhibits skin growth. This creates a condition where continued pulp expansion leads to berry splitting, resulting in either desiccation or rot. These disease pressures have increased the demand for crop protection chemicals in commercial agriculture. This growing need for crop protection solutions is anticipated to drive market growth throughout the forecast period.

Fungicides Leads the Market

According to the Food and Agriculture Organization, fungicides accounted for 58.5% of the country's total crop protection chemicals market value in 2022. The country's diverse climate zones, including the temperate Atacama Desert in the north, Mediterranean climate in the central valley region, and cool, damp conditions in the southern low coastal mountains and rugged Andes in the east, create conditions that support crop production but also promote fungal diseases. The Food and Agriculture Organization reported that agricultural fungicide usage increased from 7,648.0 metric tons in 2021 to 8,293.2 metric tons in 2022.

Cereals and vegetables are the primary drivers of fungicide demand in Chile, one of the major producers and exporters of grain and cereal crops, including wheat, maize, barley, rice, and sorghum. The increasing cultivation of these crops and fungal disease

infestations necessitate higher fungicide consumption. Septoria tritici, the most damaging foliar disease affecting Chilean wheat, causes yield losses between 30-50% during severe seasons. Wheat growers have increased fungicide application to minimize these losses. In post-harvest applications, imazalil is extensively used on citrus fruits during storage and transportation. Common fungicides used for grains and cereals include propiconazole, tebuconazole, azoxystrobin, and fluxapyroxad. The grain and cereal fungicide market is primarily driven by the need to combat septoria/mildew resistance, limited availability of new action modes, and requirements for crop greening.

Powdery mildew is a fungal disease that affects numerous crops, causing a white powdery coating on plant leaves, stems, and flowers. While the infection appears on the plant surface, it significantly impacts plant health, appearance, and yield, particularly in grapes, apples, cucurbits, tomatoes, and strawberries. According to the United States Department of Agriculture, fungal diseases are a major constraint in crop production in Chile, with 15-20% of production lost due to diseases in 2022. The primary diseases affecting soybean plant foliage in the country are target spot, Cercospora leaf blight, and Asian soybean rust. Fungicides such as epoxiconazole, fluxapyroxad, and azoxystrobin effectively control these diseases.

Commercial bio fungicides in the market protect against pathogens including Pythium, Rhizoctonia, Fusarium, Sclerotinia, Thielaviopsis, Botrytis, and powdery mildew. These bio fungicides help Chilean farmers control plant pathogenic fungi and bacteria while preserving environmental health. The formulation of biofungicides includes carrier materials composed of organic substances such as animal broth, organic materials, and organic waste products, in addition to microbial components. Biofungicides maintain agroecosystem stability and sustainability through their environmentally safe properties. The increasing fungal infestations and resulting yield losses in fruits, vegetables, grains, and cereals have heightened the demand for fungicides, driving market growth.

Chile Crop Protection Chemicals Industry Overview

The Chilean crop protection chemicals market is consolidated, with major players occupying the market share. The major players operating in the market include Syngenta AG, Bayer AG, BASF SE, Corteva Agriscience, and UPL. Companies in the Chilean crop protection chemicals market are mainly focused on developing new, qualitative products, and developing new technologies to improve product quality. New product launches, partnerships, and mergers and acquisitions are the main strategies followed by the major players in the Chilean crop protection chemicals market.

Additional Benefits:

  The market estimate (ME) sheet in Excel format
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