

## **Mexico Agrochemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Mexico Agrochemicals Market size is estimated at USD 1.43 billion in 2025, and is expected to reach USD 1.74 billion by 2030, at a CAGR of 4.1% during the forecast period (2025-2030).

### **Key Highlights**

- The agricultural agrochemicals industry in the country has been transforming over the years, with robust growth coupled with changing crop mix trends and environmental regulations, which play an essential role in this sector. An increasing need to balance the judicious use of the best chemicals and minimize the impact of agrochemicals is becoming relevant to ensure safety and proper in all aspects by the adequate intervention of the government. Mexico, on December 2021, passed a decree to eliminate the use of glyphosate herbicide by 2024. This would create massive demand for bio-based sustainable products that protect and facilitate plant growth.
- There is a comprehensive regulatory framework that addresses the issues and controls the pesticide value chain in Mexico. But the significant challenges are using more than 3000 agrochemicals for different applications, including banned products, and the recurring delay in the registration process; they also require improvement in regulatory compliance and enforcement activities to boost the sector further.
- The imports of agrochemicals are regulated by state-owned Petroleos Mexicanos (Pemex) to control the price hike and cater to the demand as the international supply has been down mainly from Russia and China. The growing global and regional population, accompanied by rising affluence, enables a shift in consumption patterns. There is a need to increase production to meet demand and ensure that the nutritional needs of an increasingly affluent population are met. With the arable land at 20 million hectares in 2021, with a drop from 2017, the demand and use of agrochemicals have become necessary to increase the yield to match the request from the increasing population.

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## Mexican Agro Chemicals Market Trends

### Need for Increased Land Productivity

The focus of the agricultural sector is to increase productivity and food security in the country. However, the country's agricultural productivity has fluctuated over the years compared to neighboring regional economies. According to the Food and Agriculture Organization, in 2020, Mexico witnessed an increase in the cultivation and production of grains and cereals, accounting for most of the country's output. Such factors are anticipated to drive the demand for agrochemical products over the forecast period. According to FAO, the arable land has been increasing in recent years. It was estimated to be 20 million hectares in 2020, which is expected to increase the agrochemical use and demand.

As per studies, cereal crops, especially wheat and maize, have contributed the highest to the overall demand for agrochemicals. Maximum demand for agrochemical products, such as pesticides, is generated by cereal crop growers in the country. In the case of vegetable crops, both herbicides and insecticides are used to protect significant crops such as tomatoes, onions, chilis, peppers, etc., as they are the primary vegetables produced in the country. With the current arable land yet to reach the previous standards though it has been increasing, calls for the effective use of agrochemicals to enhance the growth and yield of the crops.

The pesticides are effective in combating pests and increasing the yield of fruits. The share of the application of such agrochemical products on fruit crops is anticipated to increase. Hence, it is expected that the agrochemicals market in Mexico will continue to grow over the coming years, majorly due to the growing population, increasing focus on food security, the increasing need to enhance land productivity, and the rise in farming income. The number of people in Mexico reached 132.2 million in 2022, a more than a 3% increase from 2020; as this trend continues, the demand for food is also skyrocketing. With these situations prevailing, the use and need for agrochemicals in an effective manner has become a necessity, and the market for such products is expected to increase.

### Fertilizers Segment to Lead the Growth of the Market

Demand for food has been increasing globally, with the increasing population and drop in arable land the need for higher yield while limited resources are being a necessity and thereby pushing the demand for fertilizers

According to the World Bank data, fertilizer consumption in terms of kilograms per hectare of arable land in the country increased from 105.6 kg per hectare in 2017 to 106.6 kg per hectare in 2020. This increase indicates the increasing use of fertilizers in the country, thus, driving the market. As reported by the UN Comtrade data, an International Trade Statistics Database of the United Nations, the fertilizer import value was USD 1,345.2 million in 2017, which increased to USD 2,091.5 million in 2021. Thus, fertilizer imports to the country increased by almost 44.7% in 2021 from the previous year. The major exporting countries to Mexico are Russian Federation, the United States, and China. The increased imports of fertilizer suggest the increasing fertilizer demand in the country. The states with the most usage of chemical fertilizer are Veracruz, Tamaulipas, Chiapas, Michoacan, Chihuahua, Guanajuato, and Sinaloa.

The government and companies are encouraging and investing more in the development of better fertilizers to enhance the agriculture sector. Technical and scientific advances have made the application of fertilizers more efficient in recent years and have helped farmers maximize fertilizers' benefits while reducing risks. For instance, slow-release fertilizers and controlled-release fertilizers are widely used on turf, in nurseries in Mexico, and in broadacre crops like maize.

### Mexican Agro Chemicals Industry Overview

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The Mexican agrochemical market is consolidated, with prominent players occupying most of the market share. In 2021, the market was dominated by players like Bayer Mexico, BASF, Syngenta, FMC, and UPL. New product launches, partnerships, and acquisitions are the major strategies being adopted by leading companies in the market.

Additional Benefits:

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

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