

North America Fungicide - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The North America Fungicide Market size is estimated at 2.2 billion USD in 2025, and is expected to reach 2.66 billion USD by 2030, growing at a CAGR of 3.89% during the forecast period (2025-2030).

Foliar application holds the utmost importance as the primary mode of fungicide application

- In North America, numerous techniques for fungicide application are utilized to effectively control fungal diseases in agriculture. By choosing suitable application methods, farmers can attain cost-efficient solutions, ensuring accurate coverage of specific areas and minimizing unnecessary usage. This improved efficacy optimizes fungicide utilization, resulting in decreased input costs for farmers.
- Among various fungicide application methods in agriculture, foliar application is the dominant mode, accounting for 60.8% of the total fungicide usage in 2022. This approach is primarily utilized in cultivating grains and cereals, which hold the largest market share of 41.4%. The targeted and efficient absorption properties of foliar application contribute to its effectiveness in controlling diseases, potentially resulting in increased yields and cost savings for farmers.
- In 2022, the seed treatment method held the second-largest market share, comprising 13.8% of the total. The rise in farmers' awareness about the benefits of using fungicide seed treatment products to protect seedlings and boost productivity resulted in a significant rise in their adoption. The seed treatment segment of the North American fungicide market is projected to experience a CAGR of 4.0% during the forecast period.
- In the North American agricultural sector, fungicides are utilized with the primary aim of maximizing crop yields and improving overall profitability. The mode of application is anticipated to experience substantial growth, with a CAGR of 4.1% during the forecast period.

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The United States holds a dominant position in the market due to an increase in fungal infestations and a rising demand for high-quality agricultural produce

- The North American fungicide market is witnessing significant expansion, with various countries in the region experiencing notable growth. This surge in fungicide demand is attributed to the need to control fungal diseases and reduce crop losses. In 2022, North America held a considerable market share of 12.1%, by value, in the global fungicide market.
- The United States dominated the North American fungicide market, accounting for a market share of 47.2% in 2022. The United States has a vast and diverse agricultural landscape, with a wide range of crops grown in different parts of the country. This diversity increases the susceptibility of crops to various fungal diseases, leading to a higher demand for fungicides.
- In 2022, Mexico ranked as the second-largest consumer of fungicides, holding a substantial market share of 21.1%. The country's agricultural practices emphasize intensive farming, characterized by the cultivation of high-yield crops in large quantities. However, this intensive approach also creates a favorable environment for the rapid spread of fungal diseases. Fusarium wilt, powdery mildew, downy mildew, anthracnose, and rust diseases significantly impact grains and cereals, leading to crop damage and reduced yields. As a result, the use of fungicides becomes imperative to protect crops and maintain productivity.
- Various factors, including rising awareness among farmers, advancements in agricultural technologies, and the expansion of the agricultural sector, drive the growth of the fungicide market in North America. As a result, the North American fungicide market is projected to experience a CAGR of 4.1% throughout the forecast period (2023-2029).

North America Fungicide Market Trends

Increasing economic losses due to fungal diseases are increasing the need for fungicides

- Fungal diseases can cause substantial crop losses by damaging plants and reducing their productivity. They can negatively impact crop quality, making the crops unsuitable for sale or consumption. In North America, Mexico is the largest consumer of fungicides, with 1,400.0 g of fungicides consumed in 2022. Mexico's climate varies from arid to tropical, providing favorable conditions for the development and spread of fungal diseases in crops.
- Between 2016 and 2019, the average economic loss resulting from decreased corn yields due to fungal diseases in the United States and Canada was estimated at USD 138.13 per hectare. The significant economic losses caused by reduced crop yields from diseases can increase the usage of chemical fungicides as farmers seek to protect their crops and mitigate the financial impact. This can lead to a higher demand for fungicides to manage and control disease outbreaks, contributing to increased chemical inputs in agriculture.
- Diseases like tar spots in maize, bollworm rots in cotton, and sudden death syndrome in soybeans caused significant losses in North America in 2022, leading to higher requirements for chemical fungicide application per hectare of agricultural land. The repeated and extensive use of fungicides also resulted in the development of resistant strains, increasing the need for the development of innovative chemical molecules.
- Owing to factors like the increased incidence of fungal disease due to changing climatic conditions in the region, the need for reduced yield losses, and higher crop productivity per hectare, the demand for chemical fungicides in North America is anticipated to grow over the coming years.

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The increasing demand for fungicides to protect the crops from disease may drive the prices of fungicides due to the increasing raw material prices

- Mancozeb is a broad-spectrum contact fungicide that is labeled for application on numerous fruits, vegetables, nuts, and field crops in the United States. It protects against a wide spectrum of fungal diseases, including potato blight, leaf spot, scab, and rust. It fulfills the role of seed treatment for crops like potatoes, corn, sorghum, tomatoes, and cereal grains. Its market price for 2022 achieved a value of USD 7.8 thousand per metric ton.
- Propineb, classified as a contact fungicide, accounted for a market price of USD 3.5 thousand per metric ton in 2022. Its utilization encompasses the control of various diseases such as scab, early and late blight, dieback, buckeye rot, downy mildew, and fruit spots, as well as brown and narrow-leaf spot diseases, impacting crops like apple, potato, chili, and tomato.
- Ziram, a fungicide categorized within the dimethyldithiocarbamate group, is registered to control fungal diseases that affect an extensive array of crops, including stone fruits, pome fruits, nuts, vegetables, and ornamental plants cultivated for commercial purposes. Its uses encompass addressing issues such as apple and pear scabs, peach leaf curls, anthracnose, and early blight in tomatoes. Its application serves the dual purpose of shielding crops from harm while growing and preserving the quality of the harvested fruits during storage or transport. The price for 2022 stood at USD 3.3 thousand per metric ton.
- Mancozeb, Propineb, and Ziram are the most commonly used fungicide ingredients. In 2021, the United States imported most of its fungicides from India, Belgium, and Germany, and it is the third-largest importer of fungicides worldwide.

North America Fungicide Industry Overview

The North America Fungicide Market is fairly consolidated, with the top five companies occupying 74.80%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Syngenta Group and UPL Limited (sorted alphabetically).

Additional Benefits:

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

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