

## **South America Biopesticides - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 142 pages | Mordor Intelligence

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### **Report description:**

The South America Biopesticides Market size is estimated at 493.4 million USD in 2025, and is expected to reach 811.7 million USD by 2030, growing at a CAGR of 10.47% during the forecast period (2025-2030).

- Biopesticides are naturally occurring substances or agents derived from animals, plants, insects, and microorganisms, including bacteria and fungi, used to manage agricultural pests and infections.
- The biopesticides market was dominated by row, which accounted for about 80.5% and was valued at about USD 303.0 million in 2022. The dominance of row was mainly due to their large cultivation area in South America.
- Bioherbicides accounted for 35.0% of South America's biopesticides market in 2022. Bioherbicides consist of microorganisms such as pathogens and other microbes or phytotoxins derived from microbes, insects, or plant extracts that act as a natural means of weed control.
- Biofungicides accounted for 24.2% of the South American biopesticides market in 2022. Bacillus species have wide applications in pest control. The formation of spores makes them adaptable and resistant to stress, making it easy to industrialize production and storage, thus increasing the potential for the application of Bacillus species. Bacillus subtilis can effectively control the plant pathogenic bacteria Fusarium and Rhizoctonia. It can also prevent diseases and promote crop growth.
- Bioinsecticides accounted for 17.8% of South America's biopesticides market in 2022. Brazil dominated the bioinsecticides market with a share of 57.7% in the same year. In Brazil, there is a complex of insects that attack soybean crops. Lepidopterans and stink bugs are the most common insects that require extensive care. These insects cause direct damage (yield reduction) and indirect damage (reduced grain quality) to soybean and other crops.

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- The South American biopesticides market has seen significant growth and dominance in recent years, particularly in Brazil, which accounted for 82.7% of the market share in 2022. This growth is due to the registration of 433 biopesticides in Brazil as of March 2022, representing a 404% increase over the past nine years. Bioherbicides are the most consumed biopesticides in Brazil, which accounted for 38.2% of the market share in 2022, followed by biofungicides, other biopesticides, and bioinsecticides.
- The success of bioherbicides can be attributed to their target-specific weedicide action, which does not harm the crops they are applied to. Argentina accounted for 28.4% of the South American biopesticides market in 2022, with row crops dominating the market with a share of 88.5%. The consumption volume of biopesticides by row crops was 20.8 thousand metric tons in 2022, and it is expected to reach 36.0 thousand metric tons by 2029.
- The Rest of South America accounted for 13.5% of the market share in 2022, with bioherbicides being the most consumed type in crop cultivation at 31.8%, followed by biofungicides and bioinsecticides at 23.2% and 18.6%, respectively. The ban on several chemical pesticides in the region presents an opportunity for the growth of the biopesticides market, as seen with the Ministry of Agriculture and Irrigation in Peru banning highly toxic pesticides and training over 120,000 people on proper pesticide use, marketing, and production.
- The South American biopesticides market is poised for continued growth and expansion, particularly in Brazil, as more farmers adopt sustainable and eco-friendly pest control methods.

#### South America Biopesticides Market Trends

Growing organic acreage owing to the rising international demand for soy, corn, sunflower, and wheat.

- The area under organic cultivation of crops in South America was recorded at 672.8 thousand hectares in the year 2021, according to the data provided by the Research Institute of Organic Agriculture (FiBL statistics). Argentina and Uruguay are the major organic-producing countries in the region, with a large area under organic crops. Argentina occupied a share of 11.5% of the organic area in the region in 2021. The primary organic crops produced in Argentina include sugarcane, raw wool, fruits, vegetables, and beans. The primary organic exports are soy, corn, sunflower, and wheat.
- Cash crops accounted for the maximum share of 53.9% under organic crop cultivation in 2021, with 384.3 thousand hectares of land. The region is a major grower of cash crops like sugarcane, cocoa, coffee, and cotton. Brazil is the largest sugarcane-growing country in the region.
- On the other hand, Uruguay is a large grower of organic fruits and vegetables in the region. The Organic Farmers' Association of Uruguay promotes organic cultivation in the country by partnering with various organic retail outlets. The World Bank-financed Sustainable Management of Natural Resources and Climate Change project (DACC) assisted 5,139 farmers in 2022 to adopt climate-smart agriculture (CSA), which helped increase the area under cultivation of organic crops in the region.
- Millions of farmers in South America continue to practice no-external input agriculture, which may very well represent the future of the region's economy despite the noticeably low domestic production. The population is becoming more health conscious, which creates a larger market for South America's increasingly environmentally friendly and sustainable farming system.

Approximately 49.0% consumers in Argentina, Brazil and Colombia are interested in purchasing organic food.

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- South America is one of the important producers and exporters of organic food products globally. The per capita spending on organic food products in South America is comparatively lesser than in other parts of the world. The average per capita spending was recorded at USD 4.3 in 2022. However, these export-oriented countries are now generating an often-overlooked domestic demand.
- The demand for naturally grown products like organic food in South American countries like Argentina, Brazil, and Colombia has increased. A survey conducted by Wisconsin Economic Development in 2021 observed that consumers are willing to pay higher prices for organically grown food. The study revealed that 43-49% of consumers are conscious about their health. Brazil ranks 43rd globally for per capita spending on organic packaged food and beverages.
- The organic products market in Argentina was valued at USD 15.9 million in 2021, representing 0.03% of the global market value, with a per capita consumption of USD 0.35, as per the data given by Global Organic Trade in 2021.
- Currently, the market for organic foods in the region is highly fragmented, with the availability of products limited to a few supermarkets and specialty stores, as only people from higher-income families are potential customers. Many supermarkets, specialized stores, and local farmers' markets in the region are now selling organic food to satisfy the growing latent demand for such products, mainly in Costa Rica, Mexico, and the urban areas of South America. Growing awareness among consumers and their buying patterns are expected to lead to a better understanding of the sustainability attributes of organic food in the region.

### South America Biopesticides Industry Overview

The South America Biopesticides Market is fragmented, with the top five companies occupying 14.10%. The major players in this market are Certis USA LLC, Coromandel International Ltd, Koppert Biological Systems Inc., Valent Biosciences LLC and Vittia Group (sorted alphabetically).

#### Additional Benefits:

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

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