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

Market Report | 2025-04-28 | 189 pages | Mordor Intelligence

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Report description:

The South America Insecticide Market size is estimated at 8.78 billion USD in 2025, and is expected to reach 10.62 billion USD by 2030, growing at a CAGR of 3.89% during the forecast period (2025-2030).

Foliar mode of application dominated the market due to its effectiveness and flexibility in the time of application.

- The foliar application of insecticides gained much popularity owing to factors like its effectiveness in controlling the target pests, and flexibility in the time and dosage of application compared to other methods. The foliar method of insecticide application accounted for the highest share of 53.8% in the year 2022, with a market value of USD 4.21 billion in the same year.
- The significance of insecticide seed treatment in controlling the spread of plant infections is exemplified by its substantial market share. In 2022, the South American seed treatment market witnessed a notable dominance of insecticide seed treatments, holding an impressive market share of 64.9% of all the application modes. This statistic underlines the growing recognition of the effectiveness of seed treatments in combatting insect vectors and safeguarding crop productivity.
- Soil application of insecticides aims to target soilborne insect pests that can cause severe effects on the root and lower parts of the plants and this method accounted for 10.5% of the total insecticides market in South America in the year 2022. The infestation of soil borne pests like white grub is known to reduce the root system by approximately 25% in soybean and 64% in maize. It was observed that Phyllophaga capillata and Aegopsis bolboceridus damaged all evaluated variables, reducing overall soybean productivity by 58.62% and maize productivity by 59.76%, which can effectively be treated with soil treatment.
- The adoption of fumigation and chemigation of insecticides in South America is increasing based on the need and effectiveness of each method based on the requirement as different methods are effective in controlling different pests.

Brazil's dominance in the market is fueled by the increasing demand for insecticides driven by the necessity for effective insect control

- The insecticide market in South America is witnessing significant expansion, with various countries in the region witnessing remarkable expansion. This increased demand for insecticides is driven by the necessity to effectively manage insect pests and minimize crop losses. As of 2022, South America accounted for 24.9% of the total market share value in the global insecticide market.
- In 2022, Brazil held a significant share of 87.7% in the South American fungicide market, asserting its dominance. Brazil has a vast and diverse agricultural landscape, cultivating a wide array of crops across different areas. This diversity makes crops more vulnerable to a variety of insect pests, resulting in an increased need for insecticides. The most frequently utilized insecticide active ingredients in the country are carbamates and pyrethroids.
- With a significant market share of 9.0%, the Rest of South America ranks as the second largest consumer of insecticides. Farmers in countries like Ecuador, Paraguay, Peru, Uruguay, and Bolivia are increasingly recognizing the economic losses caused by insect infestations. However, this intensive approach also creates favorable conditions for the rapid spread of insect pests, such as aphids, maggots, whiteflies, flea beetles, cutworms, hornworms, and thrips. These pests pose a substantial threat to grains and cereals, resulting in crop damage and diminished yields. Therefore, the use of insecticides becomes essential to safeguard crops and ensure continued productivity.
- As a result, the market is expected to experience a CAGR of 4.2% during the forecast period (2023-2029), primarily driven by the increasing demand for agricultural products and the rising significance of insecticides in protecting crops.

South America Insecticide Market Trends

Chile recorded the highest per capita consumption rate of insecticides in South America

- Insects can cause direct damage to crops by feeding on plant tissues such as leaves, stems, roots, or fruits. This feeding can result in reduced photosynthesis, stunted growth, deformities, or even plant death. These adverse effects can lead to substantial yield losses and affect the overall productivity of the crops.
- South America cultivates a wide range of crops, including major commodities such as soybeans, corn, coffee, wheat, sugarcane, bananas, and citrus fruits. The major pests in these crops include stink bugs, loopers, armyworms, aphids, and whiteflies.
- In South America, Chile is the largest consumer of insecticides, with a consumption of 1.6 kg/ha in 2022. Chile is a major exporter of agricultural products, particularly fruits and wine. Export markets often have stringent phytosanitary regulations and quality standards to prevent the spread of pests and ensure food safety. Insecticide use is crucial to comply with these requirements, safeguarding market access of Chilean produce in international markets.
- The southern regions of Brazil, including the states of Parana, Rio Grande do Sul, and Cerrado region in central Brazil, are known for extensive agricultural production of soybeans, corn, and cotton. They face major concerns with pests like the fall armyworm, rootworm, bollworm, and corn earworm, contributing to Brazil's rank as the second-highest consumer of insecticides in South America, with a consumption rate of 765.6 g/ha.
- South America exhibits a wide range of climatic conditions, from tropical rainforests to arid and semi-arid regions. These diverse agroecological conditions influence pest populations and dynamics. The use of insecticides is necessary to provide the best crop protection, which will further drive the insecticide market.

Cypermethrin is the highest-priced insecticide at USD 21.08 thousand per metric ton

- Cypermethrin belongs to the class of pyrethroid insecticides, which are non-synthetic chemicals designed to mimic the natural insecticidal properties of pyrethrins derived from chrysanthemums. In South America, cypermethrin is used to effectively manage a wide range of pests, including, but not limited to, aphids, beetles, caterpillars, leafhoppers, and whiteflies. The mode of action of cypermethrin involves disrupting the nervous systems of insects, leading to paralysis and, ultimately, their death. In 2022, cypermethrin was priced at USD 21.08 thousand per metric ton.
- Imidacloprid is a neonicotinoid insecticide belonging to the chemical class of neonicotinoids. Neonicotinoids act on the nervous system of insects in a similar way to nicotine, causing overstimulation of nerve cells and ultimately leading to paralysis and death. This active ingredient was priced at USD 17.17 thousand per metric ton in 2022. In South America, imidacloprid is widely used to effectively manage various pests, including aphids, leafhoppers, whiteflies, thrips, and certain beetle species.
- Malathion is an organophosphate insecticide belonging to the chemical class of organophosphates. It is widely used to control a variety of insect pests. In South America, malathion is used to effectively manage pests, such as aphids, spider mites, thrips, fruit flies, and leafhoppers in various crops. Malathion's mode of action involves inhibiting acetylcholinesterase, an enzyme essential for proper nerve function in insects. By disrupting the nervous system, it causes overstimulation of nerve cells, leading to paralysis and, ultimately, death of the target pests. This is the most affordable chemical among the three, with a price of USD 12.5 thousand per metric ton in 2022.

South America Insecticide Industry Overview

The South America Insecticide Market is moderately consolidated, with the top five companies occupying 46.80%. The major players in this market are ADAMA Agricultural Solutions Ltd, Bayer AG, Corteva Agriscience, FMC Corporation and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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