

Europe Fungicide Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)

Market Report | 2025-06-28 | 173 pages | EMR Inc.

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Report description:

The Europe fungicide market reached around USD 1.78 Billion in 2024. The market is projected to grow at a CAGR of 2.80% between 2025 and 2034 to reach nearly USD 2.35 Billion by 2034.

Europe Fungicide Market Growth

In 2023, Europe's agriculture industry produced EUR 275.8 billion worth of crops, including cereals, vegetables, and horticultural plants. This constituted a share of nearly 51.3% of the EU's total agricultural output. France was the leading agricultural producer in Europe (EUR 96 billion), followed by Germany (EUR 76.6 billion), and Italy (EUR 71.9 billion). This is expected to drive the demand for fungicides in Europe over the forecast period.

During 2011-2020, annual pesticide sales in Europe remained relatively stable (at around 350,000 tons) while recording an annual fluctuation of \pm 6%. This is attributed to varying crop seasons and harvests, besides governmental programs that aim at boosting the productivity of the agricultural sector. In 2020, fungicides and bactericides accounted for 43% of overall pesticide sales, due to increasing demand for inorganic fungicides (containing inorganic sulphur, copper compounds, and other chemicals permitted in organic farming).

Germany, Italy, France, and Spain witnessed the highest sales of fungicides, coupled with countries like Austria and Latvia, where pesticide sales surged by over 60% since 2011. In 2020, countries such as Hungary, Cyprus, and the Netherlands, among 13 others, accounted for over 67% of overall pesticide sales in Europe. This is creating a favourable market outlook for fungicides, especially with increasing gains in agricultural productivity.

Key Trends and Developments

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The rising appeal of biofungicides; rapid technological changes; innovations in fungicide application; and a shift towards integrated pest management practices are the major trends influencing the Europe fungicide market expansion

September 2024

Biotalys, a Netherlands-based agtech company, received the approval of CTGB for testing its unique biofungicide EVONA against botrytis and powdery mildew on 40 hectares of tomatoes, 10 hectares of strawberries, and 20 hectares of cucumbers in a greenhouse facility.

October 2023

The British government approved the safety standards of Vimoy, a Bayer product containing isoflucypram for application in the domestic agricultural sector. This unique fungicide is developed to protect wheat crops from foliar diseases including yellow rust.

January 2023

The Federal State Statistics Service of Russia reported that domestic production of fungicides reached 29.8 thousand tons during January-November 2023.

December 2022

Seipasa, a Spain-based company specialising in the manufacturing of biological crop protection solutions, launched Fungisei, a unique microbiological fungicide that protects crops from diseases like botrytis, mildew, and powdery mildew, among others.

Rising appeal of biofungicides

The rising incidence of fungal diseases in high-value crops such as strawberries, tomatoes, and cucumbers has prompted major fungicide manufacturers to invest in producing eco-friendly biofungicides, thereby driving the market growth.

Rapid technological changes

Technological breakthroughs in combinatorial chemistry, bio-rational-screen, and high-throughput screening have enabled agricultural scientists to discover new ingredients for making targeted and effective fungicides.

Innovations in fungicide application

Novel ways of fungicide application are under development to fight against chemical-resistant plant pathogens.

Shift towards integrated pest management practices

With the increasing focus on sustainable farm management, an increasing number of crop growers are adopting integrated pest management strategies to drive the market growth.

Europe Fungicide Market Trends

The introduction of innovative modes of fungicide application is driving the market revenue. The soaring appeal for foliar spray has emerged as a key market trend since it promotes healthy plant growth and minimises the wastage of resources. By delivering

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liquid fertilisers and fungicides directly to plant leaves, they facilitate rapid nutrient absorption and reduce the risk of nutritional deficiencies in plants. They also ensure effective pest management and deliver results more quickly as compared to soil-based applications.

Europe Fungicide Industry Segmentation

The EMR's report titled "Europe Fungicide Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup by Application Mode

- Foliar Spray
- Seed Treatment
- Soil Treatment
- Others

Market Breakup by Crop Type

- Fruits and Vegetables
- Grains and Cereals
- Pulses and Oilseeds
- Others

Market Breakup by Region

- Germany
- United Kingdom
- France
- Italy
- Others

Europe Fungicide Market Share

Based on country, the market is segmented into the United Kingdom, Germany, Italy, and France, among others. Over the forecast period of 2025-2034, Germany is assessed to grow at a CAGR of 3.3% as agricultural activities in the country thrive.

Leading Companies in the Europe Fungicide Market

Major market players are expected to partner with leading logistics companies to bolster their supply chain network. With increasing investments in the development of chemical-free fungicides that maintain the natural soil profile, the market is expected to expand rapidly.

- BASF SE
- Bayer AG
- Corteva Agriscience
- Nufarm Ltd.
- Syngenta Crop Protection AG

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- UPL Ltd.
- ADAMA Agricultural Solutions Limited
- Sumitomo Chemical Co. Ltd.
- FMC Corp.
- Wynca Group
- Others

Table of Contents:

- 1 Executive Summary
 - 1.1 Market Size 2024-2025
 - 1.2 Market Growth 2025(F)-2034(F)
 - 1.3 Key Demand Drivers
 - 1.4 Key Players and Competitive Structure
 - 1.5 Industry Best Practices
 - 1.6 Recent Trends and Developments
 - 1.7 Industry Outlook
- 2 Market Overview and Stakeholder Insights
 - 2.1 Market Trends
 - 2.2 Key Verticals
 - 2.3 Key Countries
 - 2.4 Supplier Power
 - 2.5 Buyer Power
 - 2.6 Key Market Opportunities and Risks
 - 2.7 Key Initiatives by Stakeholders
- 3 Economic Summary
 - 3.1 GDP Outlook
 - 3.2 GDP Per Capita Growth
 - 3.3 Inflation Trends
 - 3.4 Democracy Index
 - 3.5 Gross Public Debt Ratios
 - 3.6 Balance of Payment (BoP) Position
 - 3.7 Population Outlook
 - 3.8 Urbanisation Trends
- 4 Country Risk Profiles
 - 4.1 Country Risk
 - 4.2 Business Climate
- 5 Global Fungicide Market Overview
 - 5.1 Key Industry Highlights
 - 5.2 Global Fungicide Historical Market (2018-2024)
 - 5.3 Global Fungicide Market Forecast (2025-2034)
 - 5.4 Global Fungicide Market Share by Region
 - 5.4.1 North America
 - 5.4.2 Europe
 - 5.4.3 Asia Pacific
 - 5.4.4 Latin America

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- 5.4.5 Middle East and Africa
- 6 Europe Fungicide Market Overview
 - 6.1 Key Industry Highlights
 - 6.2 Europe Fungicide Historical Market (2018-2024)
 - 6.3 Europe Fungicide Market Forecast (2025-2034)
- 7 Europe Fungicide Market by Application Mode
 - 7.1 Foliar Spray
 - 7.1.1 Historical Trend (2018-2024)
 - 7.1.2 Forecast Trend (2025-2034)
 - 7.2 Seed Treatment
 - 7.2.1 Historical Trend (2018-2024)
 - 7.2.2 Forecast Trend (2025-2034)
 - 7.3 Soil Treatment
 - 7.3.1 Historical Trend (2018-2024)
 - 7.3.2 Forecast Trend (2025-2034)
 - 7.4 Others
- 8 Europe Fungicide Market by Crop Type
 - 8.1 Fruits and Vegetables
 - 8.1.1 Historical Trend (2018-2024)
 - 8.1.2 Forecast Trend (2025-2034)
 - 8.2 Grains and Cereals
 - 8.2.1 Historical Trend (2018-2024)
 - 8.2.2 Forecast Trend (2025-2034)
 - 8.3 Pulses and Oilseeds
 - 8.3.1 Historical Trend (2018-2024)
 - 8.3.2 Forecast Trend (2025-2034)
 - 8.4 Others
- 9 Europe Fungicide Market by Country
 - 9.1 Germany
 - 9.1.1 Historical Trend (2018-2024)
 - 9.1.2 Forecast Trend (2025-2034)
 - 9.2 United Kingdom
 - 9.2.1 Historical Trend (2018-2024)
 - 9.2.2 Forecast Trend (2025-2034)
 - 9.3 France
 - 9.3.1 Historical Trend (2018-2024)
 - 9.3.2 Forecast Trend (2025-2034)
 - 9.4 Italy
 - 9.4.1 Historical Trend (2018-2024)
 - 9.4.2 Forecast Trend (2025-2034)
 - 9.5 Others
- 10 Market Dynamics
 - 10.1 SWOT Analysis
 - 10.1.1 Strengths
 - 10.1.2 Weaknesses
 - 10.1.3 Opportunities
 - 10.1.4 Threats

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- 10.2 Porter's Five Forces Analysis
 - 10.2.1 Supplier's Power
 - 10.2.2 Buyer's Power
 - 10.2.3 Threat of New Entrants
 - 10.2.4 Degree of Rivalry
 - 10.2.5 Threat of Substitutes
- 10.3 Key Indicators of Demand
- 10.4 Key Indicators of Price
- 11 Value Chain Analysis
- 12 Trade Data Analysis (HS Code- 38892)
 - 12.1 Major Importing Countries
 - 12.1.1 By Volume
 - 12.1.2 By Value
 - 12.2 Major Exporting Countries
 - 12.2.1 By Volume
 - 12.2.2 By Value
- 13 Competitive Landscape
 - 13.1 Supplier Selection
 - 13.2 Key Global Players
 - 13.3 Key Regional Players
 - 13.4 Key Player Strategies
 - 13.5 Company Profiles
 - 13.5.1 BASF SE
 - 13.5.1.1 Company Overview
 - 13.5.1.2 Product Portfolio
 - 13.5.1.3 Demographic Reach and Achievements
 - 13.5.1.4 Certifications
 - 13.5.2 Bayer AG
 - 13.5.2.1 Company Overview
 - 13.5.2.2 Product Portfolio
 - 13.5.2.3 Demographic Reach and Achievements
 - 13.5.2.4 Certifications
 - 13.5.3 Corteva Agriscience
 - 13.5.3.1 Company Overview
 - 13.5.3.2 Product Portfolio
 - 13.5.3.3 Demographic Reach and Achievements
 - 13.5.3.4 Certifications
 - 13.5.4 Nufarm Ltd.
 - 13.5.4.1 Company Overview
 - 13.5.4.2 Product Portfolio
 - 13.5.4.3 Demographic Reach and Achievements
 - 13.5.4.4 Certifications
 - 13.5.5 Syngenta Crop Protection AG
 - 13.5.5.1 Company Overview
 - 13.5.5.2 Product Portfolio
 - 13.5.5.3 Demographic Reach and Achievements
 - 13.5.5.4 Certifications

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- 13.5.6 UPL Ltd.
 - 13.5.6.1 Company Overview
 - 13.5.6.2 Product Portfolio
 - 13.5.6.3 Demographic Reach and Achievements
 - 13.5.6.4 Certifications
- 13.5.7 ADAMA Agricultural Solutions Limited
 - 13.5.7.1 Company Overview
 - 13.5.7.2 Product Portfolio
 - 13.5.7.3 Demographic Reach and Achievements
 - 13.5.7.4 Certifications
- 13.5.8 Sumitomo Chemical Co. Ltd.
 - 13.5.8.1 Company Overview
 - 13.5.8.2 Product Portfolio
 - 13.5.8.3 Demographic Reach and Achievements
 - 13.5.8.4 Certifications
- 13.5.9 FMC Corp.
 - 13.5.9.1 Company Overview
 - 13.5.9.2 Product Portfolio
 - 13.5.9.3 Demographic Reach and Achievements
 - 13.5.9.4 Certifications
- 13.5.10 Wynca Group
 - 13.5.10.1 Company Overview
 - 13.5.10.2 Product Portfolio
 - 13.5.10.3 Demographic Reach and Achievements
 - 13.5.10.4 Certifications
- 13.5.11 Others

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