

Agricultural Adjuvants Market Report and Forecast 2025-2034

Market Report | 2025-07-28 | 171 pages | EMR Inc.

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Report description:

The global agricultural adjuvants market is expected to grow at a CAGR of 5.80% during the period 2025-2034.

The Global Agricultural Adjuvants Market Likely to be Driven by Growing Population and Demand for Food

The market for agricultural adjuvants is expected to be driven by rising global population, decreasing arable land, and increasing demand for food. North America, Europe, Asia, and parts of Oceania are projected to be key markets.

Adjuvants are substances mixed with herbicides or pesticides to improve their performance in terms of better handling and mixing, enhanced effectiveness and safety, better distribution, and drift decrease. Adjuvants may be added to the product during formulation, or to the spray mix just before treatment. The various types of adjuvants include surfactants, compatibility agents, anti-foaming agents and spray colorants (dyes), and drift control agents. The type of adjuvant used influences herbicide performance.

Surfactants (surface-active ingredients) enhance emulsifying, dispersing, spreading, wetting, or other surface modifying properties of liquids. These substances increase the spray coverage on flora which aids in greater absorption of the herbicide by the plant. Surfactants include emulsifying agents, wetting agents (spreaders), crop oil concentrates, and stickers.

Emulsifying agents enable the mixing of two incompletely mixed liquids to form an emulsion. Oil-in-water and water-in-oil are the two types of emulsions employed in herbicide applications.

Wetting agents (spreaders) reduce the surface tension of the mixture, enabling a greater part of every spray droplet to come into contact with the plant surface to enhance coverage and efficacy of the herbicide. However, in a few cases, herbicide selectivity may be altered. Spreaders are of four types - anionic, cationic, nonionic, and amphoteric. Anionic and cationic surfactants carry negative and positive electrical charges respectively while nonionic surfactants do not carry an overall electrical charge. Amphoteric may carry positive or negative charge depending on solution pH.

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Crop oil concentrates refer to products containing 80 to 85 percent petroleum or vegetable oil in addition to 15 to 20 percent surfactant and emulsifiers. An emulsifiable oil generally indicates a product carrying nearly 98 percent oil and 1 to 2 percent emulsifiers. This group is commonly known as nonphytotoxic (phytobland) oils.

Silicone-based surfactants provide significant reduction in surface tension of water at very low concentrations.

Stickers are adjuvants that enable the herbicide to stick to the plant, preventing the spray from spilling off the vegetation. The longer the spray remains in contact with the plant, the more effective the herbicide application becomes.

Compatibility agents are adjuvants employed to help in herbicide suspension when combined with other pesticides or fertilizers. These are generally used when the carrier solution is a liquid fertilizer.

Acidifiers are acids added to herbicide spray mixtures to neutralize alkaline solutions and lower pH. Acidifiers do not exhibit a buffering action.

Buffers are used to modify pH of a water solution to a particular level which is sustained even if there is a change in the solution pH.

Anti-foaming agents remove excess foam that occurs when some herbicide mixtures go through mixing in the spray tank.

Spray colorants are dyes added to the spray tank to enable visual observation of treated areas.

Drift control agents are used to control drift by reducing the number of small spray droplets that may drift off the target vegetation.

Activator Adjuvant Segment Likely to Drive the Market

Activator adjuvants enhance pesticide activity by increasing reducing surface tension on the leaf and increasing the absorption rate. Activator adjuvants include surfactants, oils, and nitrogen-based fertilizers. Activator adjuvants are the most widely used and expected to be the market driver. Among surfactants, nonionic are the most commonly used and recommended for use with the maximum number of registered pesticides. Thus, nonionic surfactants are likely to be the most demanded surfactant type.

Global Agricultural Adjuvants Market Segmentation

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

By function, the market is segmented into:

- Activator Adjuvants (further broken down by type as given below)

??- Surfactants

??- Oil-based Adjuvants

- Utility Adjuvants (further broken down by type as given below)

??- Compatibility Agents

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- ??- Buffers/ Acidifiers
- ??- Antifoam Agents
- ??- Water Conditioners
- ??- Anti-Drift Agents
- ??- Others

By application, the market is divided into:

- Insecticides
- Herbicides
- Fungicides
- Others

By crop type, the market is classified into:

- Cereals and Grains (further broken down by type as given below)
 - ??- Corn
 - ??- Wheat
 - ??- Rice
 - ??- Others
- Fruits and Vegetables
- Oilseeds and Pulses (further broken down by type as given below)
 - ??- Soybean
 - ??- Others
- Others

By formulation, the market is segmented into:

- Suspension Concentrate
- Emulsifiable Concentrate

By adoption stage, the market is divided into:

- In-formulation
- Tank-Mix

By region, the market is classified into:

- North America
- Europe
- Asia Pacific
- Latin America
- Middle East and Africa

Key Industry Players in the Global Agricultural Adjuvants Market

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The report presents a detailed analysis of the following key players in the market, looking into their capacity, and latest developments like capacity expansions, plant turnarounds, and mergers and acquisitions:

- Corteva, Inc.
- Evonik Industries AG.
- Croda International Plc
- Nufarm Ltd
- Solvay SA
- BASF SE
- Others

The EMR report gives an in-depth insight into the industry by providing a SWOT analysis as well as an analysis of Porter's Five Forces model.

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