

Nematicide Market by Type (Chemical, Biological), Nematode Type (Root-knot, Cyst, Lesion), Mode of Application (Drenching, Soil Dressing, Seed Treatment, Fumigation), Formulation, Crop Type and Region - Global Forecast to 2030

Market Report | 2025-09-02 | 403 pages | MarketsandMarkets

AVAILABLE LICENSES:

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

Report description:

The market for nematicides is estimated to be USD 2.25 billion in 2025 and is projected to reach USD 3.06 billion by 2030, at a CAGR of 6.4% during the forecast period. The market is driven by rising crop losses caused by plant-parasitic nematodes, significantly reducing yields in major crops such as soybeans, corn, cotton, and vegetables. With growing global food demand and shrinking arable land, farmers are under increasing pressure to maximize productivity per hectare, making effective nematode management essential. High-value crops like fruits, vegetables, and plantation crops are particularly vulnerable, further boosting the demand for nematicides. In addition, the expansion of large-scale commercial farming and protected cultivation systems has heightened the need for reliable nematode control solutions.

<https://www.marketsandmarkets.com/Images/nematicides-market-new.webp>

Another key driver is the rapid adoption of advanced technologies such as seed-applied nematicides, precision agriculture, and integrated pest management (IPM), which improve application efficiency and reduce input costs. Regulatory restrictions on traditional fumigants have also accelerated the shift toward safer, bio-based nematicides, supported by government initiatives and sustainability goals. Furthermore, continuous product innovations, strategic partnerships, and investments by global agrochemical companies are expanding the availability of both chemical and biological nematicide solutions, thereby reinforcing market growth.

"By mode of application, the seed treatment segment is projected to grow at a significant rate during the forecast period" Seed treatment as a mode of application is growing at a significant rate in the nematicides market, driven by its efficiency,

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

cost-effectiveness, and ability to provide early-stage protection to crops. Unlike traditional soil or foliar applications, seed treatment enables precise application of nematicides directly onto seeds, ensuring uniform coverage and reducing the overall quantity of chemicals required. This targeted approach minimizes environmental impact, enhances germination rates, and strengthens plant establishment, thereby improving crop yield potential. Rising demand for sustainable agricultural practices and regulatory pressures to reduce excessive chemical usage have further accelerated the adoption of seed-applied technologies. Additionally, advancements in formulation technology and the integration of biological nematicides into seed treatments have broadened their appeal, particularly among farmers seeking integrated pest management solutions. With global players investing in innovative seed treatment solutions, this mode of application is expected to continue its strong growth trajectory in the nematicides market.

"By nematode type, the root-knot nematodes segment is estimated to lead the market during the forecast period"

By nematode type, the root-knot nematodes segment is estimated to account for the largest share of the nematicides market due to the wide distribution and severe impact of root-knot nematodes on agricultural productivity. These nematodes infect a broad range of crops, including fruits, vegetables, cereals, and pulses, causing gall formation on roots, stunted growth, and significant yield losses. Their ability to thrive in diverse agro-climatic conditions makes them one of the most destructive groups of plant-parasitic nematodes globally. The rising cultivation of high-value crops that are highly susceptible to root-knot nematode infestations has further accelerated the demand for effective control solutions. Farmers are increasingly relying on both chemical and biological nematicides to manage these pests, supported by advancements in seed treatments and integrated pest management practices. Continuous product innovations and the introduction of bio-based alternatives are also addressing concerns over resistance and environmental safety, reinforcing root-knot nematodes' dominance in the nematode type segment.

"North America is estimated to hold the largest market share, while Europe is expected to be the fastest-growing market during the forecast period"

North America is estimated to lead the global nematicides market, driven by its highly commercialized agriculture sector and extensive cultivation of high-value crops such as vegetables, fruits, corn, and soybeans. Farmers in the region face significant yield losses from plant-parasitic nematodes, particularly root-knot and cyst nematodes, which have fueled strong demand for effective control solutions. The adoption of advanced farming technologies, including seed-applied nematicides and integrated pest management systems, has further strengthened the market's growth. Additionally, the presence of leading agrochemical companies with strong product portfolios and continuous innovations supports regional dominance. Stringent regulations on chemical pesticide use have also accelerated the shift toward biological nematicides, aligning with consumer demand for residue-free produce. These factors position North America as the leading market for nematicides, reflecting both the scale of production and advanced crop protection practices.

The European market is projected to grow at the highest rate, supported by strong regulatory backing for sustainable agriculture and rising adoption of biological crop protection solutions. The European Union's strict restrictions on conventional chemical pesticides have increased reliance on bio-based and environmentally friendly nematicides, driving innovation and market expansion. Countries such as Spain, Italy, and France, with large-scale fruit and vegetable cultivation, face significant nematode infestations, creating high demand for effective and safer alternatives. The region is also witnessing rapid integration of precision agriculture practices, enabling targeted nematicide application and minimizing environmental impact. Furthermore, increasing consumer preference for organic and residue-free food products is encouraging growers to invest in biological nematicide solutions. With active support from government policies and continuous R&D investments, Europe is positioned to emerge as the fastest-growing region in the global nematicides market.

Break-up of Primaries

In-depth interviews were conducted with chief executive officers (CEOs), directors, and other executives from various key organizations operating in the nematicides market:

- By Company Type: Tier 1 - 25%, Tier 2 - 45%, and Tier 3 - 30%
- By Designation: Directors- 20%, Managers - 50%, Executives - 30%
- By Region: North America - 25%, Europe - 30%, Asia Pacific - 20%, South America - 15%, and Rest of the World - 10%

Prominent companies in the market include BASF SE (Germany), Bayer AG (Germany), UPL (India), T. STANES AND COMPANY LIMITED (India), Corteva (US), Koppert (Netherlands), FMC Corporation (US), Nufarm (Australia), Syngenta (Switzerland), American

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Vanguard Corporation (US), Sumitomo Chemicals (Japan), Lallemand Inc. (Canada), Novonesis Group (Denmark), Biobest Group NV (Belgium), and PI Industries (India).

Other players include IPL Biologicals (India), Bioceres Crop Solutions (Argentina), Rovensa Next (Spain), Bionema (UK), BioConsortia (US), Certis USA L.L.C. (US), Futureco Bioscience (Spain), Gowan Company (US), AgriLife (India), and Andermatt Group AG (Switzerland).

Research Coverage

This research report categorizes the nematicides market by type (chemical and biological), nematode type (root-knot nematodes, cyst nematodes, lesion nematodes, and other nematodes), formulation (granular and liquid), mode of application (fumigation, soil dressing, drenching, seed treatment, and other modes of application), crop type (cereals & grains, oilseeds, fruits & vegetables, and other crop types), and region (North America, Europe, Asia Pacific, South America, and Rest of the World). The scope of the report covers detailed information regarding drivers, restraints, challenges, and opportunities influencing the growth of the nematicides market.

A detailed analysis of the key industry players was done to provide insights into their business overview, services, key strategies, contracts, partnerships, agreements, new service launches, mergers and acquisitions, and recent developments associated with the nematicides market. This report covers competitive analysis of upcoming startups in the nematicides market ecosystem.

Furthermore, the study also covers industry-specific trends such as technology analysis, ecosystem and market mapping, and patent and regulatory landscape, among others.

Reasons to buy this report

The report will help market leaders/new entrants in this market by providing information on the closest approximations of the revenue numbers for the overall nematicides and the subsegments. It will help stakeholders understand the competitive landscape and gain more insights to better position their businesses and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

It provides insights into the following pointers:

- Analysis of key drivers (high demand for high-value crops), restraints (varying government regulations), opportunities (use of plant-based nematicides in organic agriculture), and challenges (resistance development) influencing the growth of the nematicides market
- New Product Launch/Innovation: Detailed insights on research & development activities and new product launches in the nematicides market
- Market Development: Comprehensive information about lucrative markets - analysis of the nematicides market across varied regions
- Market Diversification: Exhaustive information about new services, untapped geographies, recent developments, and investments in the nematicides market
- Competitive Assessment: In-depth assessment of market shares, growth strategies, product offerings, brand/product comparisons, and product footprints of leading players such as BASF (Germany), Syngenta (Switzerland), Bayer AG (Germany), UPL (India), Corteva (US), FMC Corporation (US), and others in the nematicides market

Table of Contents:

1 INTRODUCTION	36
1.1 STUDY OBJECTIVES	36
1.2 MARKET DEFINITION	36
1.3 MARKET SCOPE	37
1.3.1 MARKET SEGMENTATION AND REGIONAL SCOPE	37
1.3.2 INCLUSIONS AND EXCLUSIONS	38
1.4 YEARS CONSIDERED	39
1.5 UNIT CONSIDERED	39
1.5.1 CURRENCY/VALUE UNIT	39

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

1.5.2	VOLUME CONSIDERED	40
1.6	STAKEHOLDERS	40
1.7	SUMMARY OF CHANGES	41
2	RESEARCH METHODOLOGY	42
2.1	RESEARCH DATA	42
2.1.1	SECONDARY DATA	43
2.1.1.1	List of major secondary sources	43
2.1.1.2	Key data from secondary sources	43
2.1.2	PRIMARY DATA	44
2.1.2.1	Key data from primary sources	44
2.1.2.2	Key industry insights	45
2.1.2.3	Breakdown of primaries	46
2.2	MARKET SIZE ESTIMATION	46
2.2.1	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH	49
2.3	DATA TRIANGULATION	51
2.4	RESEARCH ASSUMPTIONS	52
2.5	RESEARCH LIMITATIONS AND RISK ASSESSMENT	52
3	EXECUTIVE SUMMARY	53
4	PREMIUM INSIGHTS	58
4.1	ATTRACTIVE OPPORTUNITIES FOR PLAYERS IN NEMATOCIDES MARKET	58
4.2	NORTH AMERICA: NEMATOCIDES MARKET, BY TYPE & COUNTRY	59
4.3	NEMATOCIDE MARKETS, BY KEY COUNTRY	59
4.4	NEMATOCIDES MARKET, BY TYPE AND REGION	60
4.5	NEMATOCIDES MARKET, BY NEMATODE TYPE AND REGION	61
4.6	NEMATOCIDES MARKET, BY FORMULATION AND REGION	62
4.7	NEMATOCIDES MARKET, BY MODE OF APPLICATION AND REGION	63
4.8	NEMATOCIDES MARKET, BY CROP TYPE AND REGION	64
5	MARKET OVERVIEW	65
5.1	INTRODUCTION	65
5.2	MACROECONOMIC INDICATORS	65
5.2.1	ADOPTION OF PESTICIDES FOR DEFENSE AGAINST PEST ATTACKS	65
5.2.2	FOREIGN DIRECT INVESTMENTS	66
5.3	GLOBAL CROP LOSSES DUE TO NEMATODES	67
5.4	MARKET DYNAMICS	68
5.4.1	DRIVERS	69
5.4.1.1	Strong demand for high-value crops	69
5.4.1.2	Rising demand for low-cost crop protection solutions	70
5.4.1.3	Increasing damage to crop production due to nematode infestations	70
5.4.1.4	Integration of nematicides with modern farming practices	71
5.4.1.5	Advancements in biological nematicides	71
5.4.2	RESTRAINTS	72
5.4.2.1	Technological limitations in using biological products	72
5.4.2.2	Stringent government regulations	72
5.4.3	OPPORTUNITIES	73
5.4.3.1	Use of plant-based nematicides in organic agriculture and horticulture	73
5.4.3.2	Resistance to crop protection chemicals	74
5.4.3.3	Rising demand for biological solutions	74

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.4.4 CHALLENGES 75
 - 5.4.4.1 Expanding adoption of GM crops to reduce dependence on conventional crop protection chemicals 75
 - 5.4.4.2 Lack of awareness and low utilization of biologicals 75
 - 5.4.4.3 Inconsistent field performance 76
- 5.5 IMPACT OF AI/GEN AI ON NEMATICIDES MARKET 76
 - 5.5.1 INTRODUCTION 76
 - 5.5.2 USE OF GEN AI IN NEMATICIDES MARKET 77
 - 5.5.3 CASE STUDY ANALYSIS 78
 - 5.5.3.1 Revolutionizing nematode management: Syngenta's satellite-powered precision tool 78
 - 5.5.3.2 Agmatix and BASF partnered to develop AI-powered detection of soybean cyst nematode 78
- 6 INDUSTRY TRENDS 79
 - 6.1 INTRODUCTION 79
 - 6.2 IMPACT OF 2025 US TARIFF - NEMATICIDES MARKET 79
 - 6.2.1 INTRODUCTION 79
 - 6.2.2 KEY TARIFF RATES 80
 - 6.2.3 PRICE IMPACT ANALYSIS 80
 - 6.2.4 IMPACT ON COUNTRY/REGION 81
 - 6.2.4.1 US 81
 - 6.2.4.2 Europe 81
 - 6.2.4.3 Asia Pacific 81
 - 6.2.5 IMPACT ON END-USE INDUSTRIES 81
 - 6.3 VALUE CHAIN ANALYSIS 82
 - 6.3.1 RESEARCH & DEVELOPMENT 82
 - 6.3.2 MANUFACTURING 83
 - 6.3.3 DISTRIBUTION 83
 - 6.3.4 MARKETING & SALES 83
 - 6.3.5 POST-SALE SERVICES 83
 - 6.4 TRADE ANALYSIS 84
 - 6.4.1 EXPORT SCENARIO OF HS CODE 3808 84
 - 6.4.2 IMPORT SCENARIO OF HS CODE 3808 85
 - 6.5 TECHNOLOGY ANALYSIS 87
 - 6.5.1 KEY TECHNOLOGIES 87
 - 6.5.1.1 RNAi-based nematicides 87
 - 6.5.2 COMPLEMENTARY TECHNOLOGIES 87
 - 6.5.2.1 Precision agriculture tools 87
 - 6.5.3 ADJACENT TECHNOLOGIES 87
 - 6.5.3.1 Seed treatment technologies 87
 - 6.6 PRICING ANALYSIS 88
 - 6.6.1 PRICING RANGE OF NEMATICIDE TYPES, BY KEY PLAYER, 2024 88
 - 6.6.2 PRICING TREND, BY NEMATICIDE TYPE, 2020-2024 89
 - 6.6.3 PRICING TREND OF NEMATICIDE PRODUCTS, BY REGION, 2020-2024 90
 - 6.7 ECOSYSTEM ANALYSIS 91
 - 6.7.1 DEMAND SIDE 91
 - 6.7.2 SUPPLY SIDE 91
 - 6.8 TRENDS/DISRUPTIONS IMPACTING CUSTOMER BUSINESS 93
 - 6.9 PATENT ANALYSIS 93
 - 6.10 KEY CONFERENCES & EVENTS, 2025-2026 97

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

6.11	REGULATORY LANDSCAPE	98
6.11.1	REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS	98
6.11.2	NORTH AMERICA	101
6.11.2.1	US	101
6.11.2.2	Canada	101
6.11.3	EUROPE	101
6.11.3.1	UK	102
6.11.3.2	France	102
6.11.3.3	Russia	102
6.11.4	ASIA PACIFIC	102
6.11.4.1	India	102
6.11.4.2	China	102
6.11.4.3	Australia	103
6.11.5	SOUTH AMERICA	103
6.11.5.1	Brazil	103
6.11.6	REST OF WORLD	104
6.11.6.1	South Africa	104
6.11.6.2	UAE	105
6.12	PORTER'S FIVE FORCES ANALYSIS	105
6.12.1	THREAT OF NEW ENTRANTS	106
6.12.2	THREAT OF SUBSTITUTES	106
6.12.3	BARGAINING POWER OF BUYERS	107
6.12.4	BARGAINING POWER OF SUPPLIERS	107
6.12.5	INTENSITY OF COMPETITIVE RIVALRY	107
6.13	KEY STAKEHOLDERS AND BUYING CRITERIA	107
6.13.1	KEY STAKEHOLDERS IN BUYING PROCESS	107
6.13.2	BUYING CRITERIA	108
6.14	INVESTMENT AND FUNDING SCENARIO	109
6.15	CASE STUDY ANALYSIS	110
6.15.1	NUFARM LAUNCHED EVOLVANCE BIOLOGICAL BIONEMATICIDE TO ENHANCE CROP RESILIENCE	110
6.15.2	SYNGENTA LAUNCHED TYMIURIUM TECHNOLOGY FOR SUSTAINABLE NEMATODE AND FUNGAL DISEASE CONTROL	111
7	NEMATICIDES MARKET, BY TYPE	112
7.1	INTRODUCTION	113
7.2	CHEMICAL	114
7.2.1	LONGER RESIDUAL ACTIVITY AND QUICK MODE OF ACTION AGAINST NEMATODES TO DRIVE SEGMENT	114
7.2.2	FUMIGANTS	117
7.2.2.1	Broad-spectrum functionality of fumigants against nematodes to drive market	117
7.2.2.2	Methyl bromide	120
7.2.2.2.1	Ability to penetrate quickly into sorptive materials at normal atmospheric pressure to drive segment	120
7.2.2.3	Metam sodium	121
7.2.2.3.1	Increasing adoption in agriculture sector to boost market	121
7.2.2.4	1-3-Dichloropropene	121
7.2.2.4.1	Minimum soil contamination and air dispersion to drive segment	121
7.2.2.5	Other fumigant types	122
7.2.3	NON-FUMIGANTS	122
7.2.3.1	Carbamates	125
7.2.3.1.1	Low toxicity to non-target organisms and selective action against nematodes	125

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

7.2.3.2	Organophosphates	128
7.2.3.2.1	Fast absorption rate and immediate protection against nematode feeding damage	128
7.2.3.3	Abamectin (Next-gen)	130
7.2.3.3.1	Targeted activity against nematodes, disrupting their nerve and muscle functions	130
7.2.3.4	SDHI (Next-gen)	132
7.2.3.4.1	Disrupting energy production in nematodes, leading to their effective control	132
7.2.3.4.2	Fluopyram	134
7.2.3.4.3	Cyclobutrifluram	134
7.2.4	OTHER CHEMICALS	134
7.2.4.1	Fluoroalkenyl compounds	135
7.2.4.2	Fluensulfone	135
7.2.4.3	Tioxazafen	135
7.2.4.4	Fluazaindolizine	135
7.3	BIOLOGICAL	137
7.3.1	STRINGENT REGULATORY POLICIES ON CONVENTIONAL AGROCHEMICALS TO DRIVE MARKET	137
7.3.2	MICROBIALS	139
7.3.2.1	High adoption of sustainable agricultural techniques to fuel growth	139
7.3.3	BIOCHEMICALS	140
7.3.3.1	Residue-free nematode management by biochemicals to propel growth	140
8	NEMATICIDES MARKET, BY NEMATODE TYPE	142
8.1	INTRODUCTION	143
8.2	ROOT-KNOT NEMATODES	145
8.2.1	RIISING NEED TO REDUCE ECONOMIC LOSSES AND ENHANCE CROP QUALITY TO DRIVE DEMAND FOR NEMATICIDES	145
8.3	CYST NEMATODES	147
8.3.1	LARGE-SCALE ECONOMIC LOSSES AND LOWER YIELD QUALITY DUE TO CYST NEMATODE INFESTATION TO INCREASE DEMAND	147
8.4	LESION NEMATODES	149
8.4.1	WIDE HOST RANGE AND PRESENCE IN TEMPERATE AND TROPICAL ENVIRONMENTS TO DRIVE MARKET	149
8.5	OTHER NEMATODE TYPES	150
9	NEMATICIDES MARKET, BY FORMULATION	153
9.1	INTRODUCTION	154
9.2	GRANULAR	155
9.2.1	GOOD STORAGE VIABILITY TO DRIVE SEGMENT GROWTH	155
9.3	LIQUID	156
9.3.1	GREATER DEGREE OF DISPERSION PROPERTY OFFERED BY LIQUID NEMATICIDES TO DRIVE DEMAND	156
10	NEMATICIDES MARKET, BY MODE OF APPLICATION	158
10.1	INTRODUCTION	159
10.2	FUMIGATION	161
10.2.1	LOWER COSTS INVOLVED IN FUMIGATION FOR NEMATODE CONTROL TO PROPEL GROWTH	161
10.3	DRENCHING	163
10.3.1	PRECISE APPLICATION AND DEEP PENETRATION OF NEMATICIDES ON TARGET NEMATODES TO DRIVE DEMAND	163
10.4	SOIL DRESSING	165
10.4.1	EFFECTIVE MANAGEMENT OF EARLY SEASON NEMATODE TO DRIVE DEMAND	165
10.5	SEED TREATMENT	167
10.5.1	SAFER APPLICATION AND EARLY SEASON PROTECTION AGAINST NEMATODE TO AUGMENT DEMAND	167
10.6	OTHER MODES OF APPLICATION	169

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

11	NEMATICIDES MARKET, BY CROP TYPE	172
11.1	INTRODUCTION	173
11.2	CEREALS & GRAINS	174
11.2.1	RISE IN CONSUMPTION AND EXTENSIVE CULTIVATION AREA TO DRIVE MARKET	174
11.2.2	CORN	176
11.2.3	WHEAT	177
11.2.4	RICE	177
11.2.5	OTHER CEREALS & GRAINS	178
11.3	OILSEEDS & PULSES	178
11.3.1	INCREASE IN CONSUMPTION OF PROTEIN- AND HEALTHY FAT-RICH MEALS TO DRIVE SEGMENTAL GROWTH	178
11.3.2	SOYBEAN	180
11.3.3	SUNFLOWER	180
11.3.4	OTHER OILSEEDS & PULSES	181
11.4	FRUITS & VEGETABLES	181
11.4.1	RISE IN EXPORTS OF FRESH, FROZEN, AND PROCESSED FRUITS & VEGETABLES FROM SOUTH ASIA TO DRIVE DEMAND	181
11.4.2	POME FRUITS	183
11.4.3	CITRUS FRUITS	184
11.4.4	LEAFY VEGETABLES	184
11.4.5	BERRIES	185
11.4.6	ROOTS & TUBERS VEGETABLES	185
11.4.7	OTHER FRUITS & VEGETABLES	186
11.5	OTHER CROP TYPES	186
12	NEMATICIDES MARKET, BY REGION	188
12.1	INTRODUCTION	189
12.2	NORTH AMERICA	191
12.2.1	US	201
12.2.1.1	Research undertaken to introduce nematode-resistant vegetables and field crops to drive market	201
12.2.2	CANADA	205
12.2.2.1	Losses in high-value cash crops to drive adoption of nematicides	205
12.2.3	MEXICO	209
12.2.3.1	Increase in root-knot and root-lesion nematode infestation in wheat to fuel market	209
12.3	EUROPE	213
12.3.1	GERMANY	221
12.3.1.1	Environment-friendly and organic farming practices to cater to nematode attacks in field crops	221
12.3.2	UK	225
12.3.2.1	High demand for nematicides since farmers still use traditional farming methods	225
12.3.3	FRANCE	229
12.3.3.1	Extensive government funds in R&D to devise sustainable methods for nematode control	229
12.3.4	SPAIN	233
12.3.4.1	Surge in government initiatives to encourage use of biological nematicides	233
12.3.5	ITALY	237
12.3.5.1	Adoption of sustainable farming procedures to drive market	237
12.3.6	REST OF EUROPE	240
12.4	ASIA PACIFIC	244
12.4.1	CHINA	254
12.4.1.1	Rise in infestation by root-knot nematodes in crops to propel market	254
12.4.2	JAPAN	258

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 12.4.2.1 Rising demand for novel nematicides catering to long-term viability of crops to drive growth 258
- 12.4.3 INDIA 262
 - 12.4.3.1 Protected environment in polyhouses to create favorable environment for root-knot nematodes 262
- 12.4.4 AUSTRALIA & NEW ZEALAND 266
 - 12.4.4.1 Increase in canola losses due to nematode attacks to support adoption of nematicides 266
- 12.4.5 REST OF ASIA PACIFIC 270
- 12.5 SOUTH AMERICA 274
 - 12.5.1 ARGENTINA 282
 - 12.5.1.1 Increasing focus on soybean and corn cultivation to boost demand for nematicides 282
 - ?
 - 12.5.2 BRAZIL 286
 - 12.5.2.1 High adoption of genetically modified crops to increase usage of nematicides 286
- 12.5.3 REST OF SOUTH AMERICA 290
- 12.6 REST OF THE WORLD (ROW) 294
 - 12.6.1 MIDDLE EAST 302
 - 12.6.1.1 Rise in population, high dependency on imports, and yield loss due to nematodes to boost market 302
 - 12.6.2 AFRICA 305
 - 12.6.2.1 Growth in demand for vegetable crops to drive growth 305
- 13 COMPETITIVE LANDSCAPE 311
 - 13.1 OVERVIEW 311
 - 13.2 KEY PLAYERS' STRATEGIES/RIGHT TO WIN 311
 - 13.3 REVENUE ANALYSIS, 2020-2024 313
 - 13.4 MARKET SHARE ANALYSIS, 2024 314
 - 13.5 COMPANY EVALUATION MATRIX: KEY PLAYERS, 2024 317
 - 13.5.1 STARS 317
 - 13.5.2 EMERGING LEADERS 317
 - 13.5.3 PERVASIVE PLAYERS 317
 - 13.5.4 PARTICIPANTS 317
 - 13.5.5 COMPANY FOOTPRINT: KEY PLAYERS, 2024 319
 - 13.5.5.1 Company footprint 319
 - 13.5.5.2 Region footprint 320
 - 13.5.5.3 Type footprint 320
 - 13.5.5.4 Formulation footprint 321
 - 13.5.5.5 Crop type footprint 322
 - 13.6 COMPANY EVALUATION MATRIX: STARTUPS/SMES, 2024 322
 - 13.6.1 PROGRESSIVE COMPANIES 322
 - 13.6.2 RESPONSIVE COMPANIES 322
 - 13.6.3 DYNAMIC COMPANIES 323
 - 13.6.4 STARTING BLOCKS 323
 - 13.6.5 COMPETITIVE BENCHMARKING: STARTUPS/SMES, 2024 324
 - 13.6.5.1 Detailed list of key startups/SMEs 324
 - 13.6.5.2 Competitive benchmarking of key startups/SMEs 325
 - 13.7 COMPANY VALUATION AND FINANCIAL METRICS 325
 - 13.8 BRAND/PRODUCT COMPARISON 327
 - 13.9 COMPETITIVE SCENARIO AND TRENDS 328
 - 13.9.1 PRODUCT LAUNCHES 328
 - 13.9.2 DEALS 330

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 13.9.3 EXPANSIONS 332
- ?
- 14 COMPANY PROFILES 333
- 14.1 KEY PLAYERS 333
- 14.1.1 BASF SE 333
- 14.1.1.1 Business overview 333
- 14.1.1.2 Products offered 334
- 14.1.1.3 Recent developments 335
- 14.1.1.3.1 Product launches 335
- 14.1.1.4 MnM view 335
- 14.1.1.4.1 Right to win 335
- 14.1.1.4.2 Strategic choices 335
- 14.1.1.4.3 Weaknesses and competitive threats 335
- 14.1.2 SYNGENTA 336
- 14.1.2.1 Business overview 336
- 14.1.2.2 Products offered 337
- 14.1.2.3 Recent developments 338
- 14.1.2.3.1 Product launches 338
- 14.1.2.4 MnM view 339
- 14.1.2.4.1 Key strengths 339
- 14.1.2.4.2 Strategic choices 339
- 14.1.2.4.3 Weaknesses and competitive threats 339
- 14.1.3 CORTEVA 340
- 14.1.3.1 Business overview 340
- 14.1.3.2 Products offered 341
- 14.1.3.3 Recent developments 342
- 14.1.3.3.1 Product launches 342
- 14.1.3.3.2 Expansions 342
- 14.1.3.4 MnM view 343
- 14.1.3.4.1 Right to win 343
- 14.1.3.4.2 Strategic choices 343
- 14.1.3.4.3 Weaknesses and competitive threats 343
- 14.1.4 UPL 344
- 14.1.4.1 Business overview 344
- 14.1.4.2 Products offered 345
- 14.1.4.3 Recent developments 346
- 14.1.4.3.1 Product launches 346
- 14.1.4.3.2 Deals 347
- 14.1.4.4 MnM view 347
- 14.1.4.4.1 Right to win 347
- 14.1.4.4.2 Strategic choices 347
- 14.1.4.4.3 Weaknesses and competitive threats 347
- ?
- 14.1.5 BAYER AG 348
- 14.1.5.1 Business overview 348
- 14.1.5.2 Products offered 349
- 14.1.5.3 MnM view 350

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 14.1.5.3.1 Right to win 350
- 14.1.5.3.2 Strategic choices 350
- 14.1.5.3.3 Weaknesses and competitive threats 350
- 14.1.6 FMC CORPORATION 351
- 14.1.6.1 Business overview 351
- 14.1.6.2 Products offered 352
- 14.1.6.3 Recent developments 353
- 14.1.6.3.1 Deals 353
- 14.1.6.3.2 Expansions 354
- 14.1.7 SUMITOMO CHEMICAL CO., LTD. 355
- 14.1.7.1 Business overview 355
- 14.1.7.2 Products offered 356
- 14.1.7.3 Recent developments 357
- 14.1.7.3.1 Deals 357
- 14.1.7.3.2 Expansions 357
- 14.1.8 NUFARM 358
- 14.1.8.1 Business overview 358
- 14.1.8.2 Products offered 359
- 14.1.8.3 Recent developments 360
- 14.1.8.3.1 Other developments 360
- 14.1.9 AMERICAN VANGUARD CORPORATION 361
- 14.1.9.1 Business overview 361
- 14.1.9.2 Products offered 362
- 14.1.9.3 Recent developments 363
- 14.1.9.3.1 Deals 363
- 14.1.10 NOVONESIS GROUP 364
- 14.1.10.1 Business overview 364
- 14.1.10.2 Products offered 365
- 14.1.10.3 Recent developments 366
- 14.1.10.3.1 Deals 366
- 14.1.11 BIOCERES CROP SOLUTIONS 367
- 14.1.11.1 Business overview 367
- 14.1.11.2 Products offered 368
- 14.1.11.3 Recent developments 369
- 14.1.11.3.1 Product launches 369
- 14.1.11.3.2 Deals 369
- ?
- 14.1.12 GOWAN COMPANY 370
- 14.1.12.1 Business overview 370
- 14.1.12.2 Products offered 370
- 14.1.13 CERTIS USA L.L.C. 371
- 14.1.13.1 Business overview 371
- 14.1.13.2 Products offered 371
- 14.1.13.3 Recent developments 372
- 14.1.13.3.1 Deals 372
- 14.1.13.3.2 Other developments 372
- 14.1.14 LALLEMAND INC 373

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

14.1.14.1	Business overview	373
14.1.14.2	Products offered	373
14.1.14.3	Recent developments	374
14.1.14.3.1	Product launches	374
14.1.15	AECI PLANT HEALTH	375
14.1.15.1	Business overview	375
14.1.15.2	Products offered	375
14.2	OTHER PLAYERS	376
14.2.1	ANDERMATT GROUP AG	376
14.2.1.1	Business overview	376
14.2.1.2	Products offered	376
14.2.2	IPL BIOLOGICALS	377
14.2.2.1	Business overview	377
14.2.2.2	Products offered	377
14.2.2.3	Recent developments	378
14.2.2.3.1	Expansions	378
14.2.3	PHERONYM, INC.	379
14.2.3.1	Business overview	379
14.2.3.2	Products offered	379
14.2.4	AGRILIFE	380
14.2.4.1	Business overview	380
14.2.4.2	Products offered	380
14.2.5	CROP IQ TECHNOLOGY	382
14.2.5.1	Business overview	382
14.2.5.2	Products offered	382
14.2.5.3	Recent developments	383
14.2.5.3.1	Expansions	383
14.2.6	ROVENSA NEXT	384
14.2.7	BIONEMA	385
14.2.8	BIOCONSORTIA	386
14.2.9	VIVE CROP PROTECTION INC.	387
14.2.10	VEGALAB SA	388
15	ADJACENT AND RELATED MARKETS	389
15.1	INTRODUCTION	389
15.2	LIMITATIONS	389
15.3	CROP PROTECTION CHEMICALS MARKET	389
15.3.1	MARKET DEFINITION	389
15.3.2	MARKET OVERVIEW	390
15.4	BIORATIONAL PESTICIDES MARKET	391
15.4.1	MARKET DEFINITION	391
15.4.2	MARKET OVERVIEW	391
16	APPENDIX	394
16.1	DISCUSSION GUIDE	394
16.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	399
16.3	AVAILABLE CUSTOMIZATION	401
16.4	RELATED REPORTS	401
16.5	AUTHOR DETAILS	402

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Nematicide Market by Type (Chemical, Biological), Nematode Type (Root-knot, Cyst, Lesion), Mode of Application (Drenching, Soil Dressing, Seed Treatment, Fumigation), Formulation, Crop Type and Region - Global Forecast to 2030

Market Report | 2025-09-02 | 403 pages | MarketsandMarkets

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2026-03-04

Signature

A large, empty rectangular box intended for a signature.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com