Agricultural Surfactant - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 144 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Agricultural Surfactant Market Analysis

The agricultural surfactants market, valued at USD 2.1 billion in 2025, is projected to reach USD 2.9 billion by 2030, growing at a CAGR of 6.7% during the forecast period. The market growth is driven by the increased adoption of precision farming equipment, including autonomous drones and electrostatic sprayers, which require specific surfactant formulations to optimize droplet size, reduce drift, and improve field application efficiency. The industry is transitioning from synthetic compounds to amphoteric and organosilicone formulations, particularly due to the expansion of biological crop protection products that require surfactants to maintain microbial effectiveness and enhance absorption. The European Union's Farm-to-Fork initiative, which aims to reduce synthetic pesticide usage by 50% by 2030, is driving research and development in nano-surfactant technologies for low-dose applications. The market's fragmented structure provides opportunities for specialized companies to gain market share through region-specific and crop-focused solutions. However, increasing raw material prices and stricter residue regulations present challenges, emphasizing the importance of developing sustainable and economically viable alternatives.

Global Agricultural Surfactant Market Trends and Insights

Increasing Demand for Agrochemicals to Boost Crop Yield

Agricultural surfactants support increased crop yields by enhancing the delivery efficiency of agrochemicals, addressing challenges of food security and declining arable land per capita. In India, field trials demonstrate that multifunctional wetters reduce spray volume by 15-20% while maintaining effectiveness in agrochemical applications. Brazil's bio-inputs market, valued at USD 1 billion, combines microbial agents with methylated seed oils to enhance root-zone penetration. Field trials of Bionema's Soil-Jet BSP100 demonstrate that optimized adjuvant formulations increase biological effectiveness by 30%. The increasing prevalence of weather-related pest and disease challenges has led both small-scale and large agricultural operations to adopt surfactants as a cost-effective crop protection solution.

Precision-Farming Adoption Raising Surfactant Usage

Agricultural drone operations covered more than 10.3 million acres in Kansas during 2024, utilizing specialized amphoteric surfactants that maintain consistent droplet size in propeller turbulence. Electrostatic spraying systems, which enable droplets to adhere to leaf undersides, reduced water consumption by 60% but require specific conductivity-balanced additives. In Brazil's Goias state, where variable-rate application covers 100% of soybean fields, agronomists select pH-stable formulations to maintain active ingredient stability during real-time tank mix adjustments. Companies such as Evonik have developed specialized products, such as BREAK-THRU MSO MAX 522, designed specifically for drone spray systems. These application-specific requirements drive steady growth and support premium pricing in the agricultural surfactants market.

High Production Cost of Bio-Based Raw Materials

Bio-based production routes using fermentation or plant-oil feedstocks remain 15-30% more expensive than petrochemical alternatives, even after factoring in carbon credits. Dow's recent USD 0.10 per pound price increase for chelant intermediates demonstrates the inflationary pressures affecting derivative supply chains. In emerging markets, where smallholder farmers operate 70% of agricultural land, price sensitivity may slow adoption without government subsidies. While efficiency improvements in enzymatic catalysis, expanded reactor capacity, and co-product utilization could achieve cost parity, the current two-year cost disadvantage constrains market share growth for renewable grades in agricultural surfactants.

Other drivers and restraints analyzed in the detailed report include:

Rising Focus on Sustainable and Bio-Based Surfactants / Nano-Surfactant Innovations Enabling Ultra-Low-Dose Actives / Stringent Regulations on Chemical Residues /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Nonionic molecules accounted for 38% of 2024 revenue due to their neutral charge, wide pH tolerance, and proven compatibility with glyphosate and phenoxy herbicides. These surfactants offer hydrophile-lipophile balance (HLB) values between 12 and 15, making them effective for emulsifying various solvent combinations. While nonionics maintain market dominance, amphoteric surfactants are experiencing 8.2% growth and increasing adoption in microbial formulations that deteriorate under anionic conditions. Field trials in European apple orchards demonstrated that amphoteric surfactants reduce copper application rates by 20% while expanding the temperature range for spraying.

Manufacturers of amphoteric surfactants utilize betaine and imidazoline structures, which offer low foaming properties and biodegradability, meeting zero-residue requirements in supermarket compliance audits. The agricultural surfactants market for amphoterics is anticipated to double by 2030, with initial adoption in drone-operated vineyard applications. Organosilicones, a nonionic subcategory, enhance performance by reducing surface tension to below 20 mN/m, allowing stomatal penetration within five seconds. Despite their premium pricing, these specialized siloxanes see selective implementation due to potential plant toxicity at higher application rates.

Herbicides accounted for 40.2% of the agricultural surfactants market revenue in 2024, as global resistance management strategies continue to rely on contact and systemic weed control solutions that require effective wetters to penetrate leaf cuticles. Field trials in the US Midwest demonstrated that tank mixtures combining saflufenacil with methylated seed oils achieved 95% velvetleaf control, indicating technological advancement. The market growth is supported by new active ingredient labels that frequently specify adjuvant requirements to ensure optimal performance.

The fungicide segment, while smaller in market value, is growing at a 7.4% CAGR due to extended pathogen lifecycles caused by warmer seasons. Research in Brazil showed that organosilicone wetters reduced soybean rust severity by 30% compared to conventional nonionic surfactants. New nano-copper formulations utilizing amphoteric carriers are undergoing EU regulatory review, with potential benefits of reduced metallic residues. The insecticide segment comprises nano-encapsulated pyrethroids requiring specialized surfactants that combine antifoam and penetrant properties.

The Agricultural Surfactants Market Report is Segmented by Product Type (Anionic, and More), by Application (Insecticide, and More), by Substrate (Synthetic, and Bio-Based), by Crop Application (Crop-Based, and More), by Form (Liquid, and Powder/Granular), by Function (Wetting Agent, and More), and by Geography (North America, Europe, Asia-Pacific, More). The Market Forecasts are Provided in Terms of Value (USD).

Geography Analysis

Asia-Pacific held 32% of market revenue in 2024, driven by China's extensive rice and maize cultivation and India's expanding soybean and cotton crop rotation practices. Research in China demonstrated that electrostatic drone spraying achieved 92.1% pest control effectiveness while reducing water usage by 90%, increasing the demand for charge-compatible adjuvants. India's agrochemical market growth of 10.3% has increased the need for wetting agents that maintain glyphosate stability in the hard water conditions prevalent in Gujarat and Madhya Pradesh. In Japan, the government-supported Smart Agriculture initiative is increasing the use of ultra-low-foam silicones to prevent sensor interference in robotic farming equipment.

Africa's market, while smaller, projects a 7.9% CAGR as Nigeria, Kenya, and South Africa expand their precision agriculture capabilities through soil testing and variable-rate application mapping. South African citrus exports require adjuvants that provide both wind resistance and easy removal during pack-house processing to comply with EU residue standards. Nigeria's greenhouse developments require pH-buffered spreading agents that work with biological insecticides, creating opportunities for regional manufacturing operations.

North America maintains its premium market position through genetically modified crops and strict drift control measures, with U.S. farmers utilizing wind tunnel-tested drift reduction products. Canadian canola farming relies on methylated seed oils for spring burn-down applications, supporting liquid surfactant market growth. European markets are transitioning toward bio-based ethoxylates and non-APE formulations in alignment with Farm-to-Fork policies. In South America, Brazil's soybean industry employs variable-rate drone technology and requires rapidly dissolving adjuvant pods suitable for diverse water conditions. Middle Eastern markets focus on soil-wetting agents to optimize limited water resources in irrigation systems.

List of Companies Covered in this Report:

Corteva Agriscience / BASF SE / Evonik Industries AG / Croda International Plc / Solvay SA / Nouryon / Clariant / Wilbur-Ellis Company LLC / Nufarm / Kao Corporation / Lamberti S.p.A. / Brandt, Inc. / GarrCo Products, Inc. / Bionema / Innospec Inc. / Stepan Company / Loveland Products, Inc. (Nutrien) / Norac Concepts Inc. / Helena Agri-Enterprises, LLC /

Additional Benefits:

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

Table of Contents:

5.7.5.4 Rest of Middle East
5.7.6 Africa
5.7.6.1 South Africa
5.7.6.2 Nigeria
5.7.6.3 Rest of Africa

6 Competitive Landscape
6.1 Market Concentration
6.2 Strategic Moves
6.3 Market Share Analysis
6.4 Company Profiles (includes Global level Overview, Market level overview, Core Segments, Financials as available, Strategic Information, Market Rank/Share for key companies, Products and Services, and Recent Developments)
6.4.1 Corteva Agriscience
6.4.2 BASF SE
6.4.3 Evonik Industries AG
6.4.4 Croda International Plc
6.4.5 Solvay SA
6.4.6 Nouryon
6.4.7 Clariant
6.4.8 Wilbur-Ellis Company LLC
6.4.9 Nufarm
6.4.10 Kao Corporation
6.4.11 Lamberti S.p.A.
6.4.12 Brandt, Inc.
6.4.13 GarrCo Products, Inc.
6.4.14 Bionema
6.4.15 Innospec Inc.
6.4.16 Stepan Company
6.4.17 Loveland Products, Inc. (Nutrien)
6.4.18 Norac Concepts Inc.
6.4.19 Helena Agri-Enterprises, LLC

7 Market Opportunities and Future Outlook

SCOTTS INTERNATIONAL

Agricultural Surfactant - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-06-01 | 144 pages | Mordor Intelligence

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 License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	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*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-26
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com