

Australia Agrochemicals Market Size and Share - Outlook Report, Forecast Trends and Growth Analysis (2025-2034)

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Report description:

Australia Agrochemicals Market Report Summary Description Value Base YearAUD billion2024Historical PeriodAUD billion2018-2024Forecast PeriodAUD billion2025-2034Market Size 2024AUD billion4.50Market Size 2034AUD billion6.86CAGR 2018-2024PercentageXX%CAGR 2025-2034Percentage4.30%CAGR 2025-2034 - Market by RegionAustralian Capital Territory4.8%CAGR 2025-2034 - Market by RegionWestern Australia4.4%CAGR 2025-2034 - Market by ApplicationCereal and GrainsXX%CAGR 2025-2034 - Market by TypePlant Growth Regulators4.6%2024 Market Share by RegionNew South Wales30.6%Australia Agrochemicals Market OverviewThe Australia agrochemicals market growth is underpinned by the critical role of agrochemicals in enhancing crop yields through effective pest, weed, and disease management. Pesticides, herbicides, and fungicides collectively drive higher agricultural productivity and food security. Government investment of AUD 33.8 million (2014-2029) aims to improve farmer access to safe agvet chemicals, fostering sustainable production. This strategic support catalyses sector expansion, strengthening Australia's position in global food supply chains.The Australia agrochemicals market revenue is impacting Australia's economic development by generating employment and boosting agricultural exports, positively influencing market revenue. These chemicals optimise land use, maximise crop productivity, and enhance produce quality by reducing defects and improving appearance. Consequently, they deliver value across the supply chain, benefiting producers and consumers alike. Market growth is supported by evolving demand for high-quality agricultural outputs and regulatory backing to ensure safety and efficacy.Australia Agrochemicals Market GrowthThe demand for the Australia agrochemicals market is driven by agrochemicals that reduce harvest cycles, enhance productivity, and provide cost-effective solutions by minimising manual labour. They also support organic farming through integrated pest management and encourage innovation in farming practices, enabling farmers to adopt more effective agrochemical solutions. The department granted USD 218,182 (GST excluded) to the Rural Industries Research and Development Corporation (RIRDC, now Agrifutures Australia) to create a self-sustaining collaborative forum for growers, research and development corporations (RDCs), and the chemical industry, aiming to share priorities and foster collaboration.Agrochemicals promote sustainable farming practices, improve soil health, and prevent overuse of land, driving growth opportunities in the Australia agrochemicals market. They also support export potential for Australian crops, reduce environmental impact when used responsibly, and help farmers adapt to climate change by enhancing crop

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resilience. Key Trends and Developments The Australia agrochemicals market growth is boosted due to shift towards bio-based agrochemicals, precision agriculture improving application efficiency, rising crop protection needs driven by climate variability, and supportive government incentives with streamlined regulations. August 2024 ADAMA partnered with US-based Elemental Enzymes to launch a novel bio-fungicide in Australia, targeting foliar diseases in crops and turf. Scheduled for 2026, the product used patented peptide technology to stimulate plant defences, aiding disease resistance management and enhancing crop protection through ADAMA's exclusive distribution and R&D efforts. May 2024 BASF launched its new insecticide, Cimegra, in Australia, offering effective, long-lasting protection against tough pests like Diamondback moth. Powered by Broflanilide, it provides a novel mode of action, no known resistance issues, and supports integrated pest management, enhancing pest control across various crops. November 2023 Azelis agreed to acquire 100% of Agspec Australia, a distributor of crop nutrition and protection products. This acquisition expanded Azelis' product offerings and strengthened its position in the agricultural and horticultural markets, enhancing its portfolio in Australia and supporting further innovation and growth. January 2023 BASF launched Axalion Active in Australia, the first global market to access the novel insecticide. Designed to control piercing and sucking pests like aphids and whiteflies, Axalion offered farmers an effective resistance-management tool, with systemic action and compatibility with beneficial insects when used as directed.

Shift Towards Bio-Based Agrochemicals is Influencing the Australia Agrochemicals Market Dynamics and Trends The market witnesses a growing shift towards bio-based agrochemicals as farmers and regulators prioritise environmental sustainability. Stringent chemical usage regulations and rising consumer demand for organic produce are key drivers. This creates opportunities for manufacturers to innovate in low-residue formulations, while addressing ecological concerns and aligning with Australia's long-term goals of sustainable agricultural practices. Precision Agriculture Enhancing Agrochemical Efficiency is Boosting Demand of the Australia Agrochemicals Market The integration of precision agriculture technologies is reshaping agrochemical application strategies. Drones, GPS mapping, and variable rate technologies enable targeted application, minimising waste and environmental impact. These innovations reduce input costs while improving crop yield and efficiency, driving agrochemical demand among technologically progressive farming enterprises seeking improved return on investment and resource optimisation. Rising Crop Protection Demand from Climate Variability is Impacting the Australia Agrochemicals Industry Revenue Australia's increasingly unpredictable climate, characterised by droughts, floods, and extreme temperatures, has heightened the demand for crop protection solutions. Agrochemicals serve as a risk mitigation tool, safeguarding yields under adverse weather conditions. This trend strengthens the market's resilience and supports the development of climate-adaptive chemical solutions, particularly in broadacre farming and high-value horticultural sectors.

Government Incentives and Regulatory Streamlining is Boosting the Australia Agrochemicals Market Growth Government-backed initiatives to improve access to agricultural and veterinary (agvet) chemicals continue to support market growth. Investment in regulatory simplification and safety evaluation encourages adoption of newer, more effective products. These policies foster innovation, reduce time-to-market for manufacturers, and ensure farmers benefit from timely, compliant crop protection solutions aligned with global trade and export standards.

Australia Agrochemicals Market Trends The Australia agrochemicals market is witnessing accelerated growth in the biopesticides segment, driven by heightened environmental concerns and the agricultural sector's transition toward sustainable and organic practices. Biopesticides are increasingly favoured for their reduced ecological footprint and effectiveness in integrated pest management (IPM) systems. This market shift is reinforced by rising regulatory support and consumer demand for residue-free produce. In January 2023, BASF introduced Axalion Active in Australia, the first global launch of this novel insecticide targeting pests like whiteflies and aphids, enhancing resistance control and IPM adoption. Further international rollouts are planned.

Opportunities in the Australia Agrochemicals Market The growth of the Australia agrochemicals market is increasingly defined by tighter regulatory and safety frameworks designed to protect public health and the environment. These reforms compel manufacturers to develop safer, more targeted formulations with lower residue profiles, improving product transparency. The new regulation, effective 1 December 2021, introduced streamlined approval pathways for low-risk chemicals and established a Governance Board within the APVMA. It also introduced extended data protection periods and usage incentives for new products, enhancing industry efficiency and encouraging innovation. Collectively, these measures drive market accountability, accelerate product-to-market timelines, and support sustainable agricultural practices.

Market Restraints Key restraints in the Australia agrochemicals market include environmental concerns such as soil degradation and water contamination, strict regulations, and health risks associated with pesticides. Market saturation, the rise of organic farming, and climate change also impact demand. Additionally, the high cost of agrochemicals strains farmers, particularly small-scale

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producers, while negative public perception and media scrutiny further hinder market growth. These factors, combined with increasing demand for natural alternatives, limit the agrochemicals sector's potential.

Australia Agrochemicals Market Report and Forecast 2025-2034 offers a detailed analysis of the market based on the following segments:

Market Breakup by Type

- Fertiliser
 - Nitrogenous
 - Phosphatic
 - Potassic
 - Secondary Fertilisers (Calcium, Magnesium, and Sulphur Fertilisers)
 - Others
- Crop Protection Chemicals
 - Herbicides
 - Insecticides
 - Fungicides
 - Others
- Plant Growth Regulators
- Others

Market Breakup by Application

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

Market Breakup by Region

- New South Wales
- Victoria
- Queensland
- Australian Capital Territory
- Western Australia
- Others

2024 Market Share by Region

- New South Wales: 30.6%
- Victoria: 23.2%
- Queensland: 19.4%
- Western Australia: 15.7%
- Others: 9.2%
- Australian Capital Territory: 1.9%

Australia Agrochemicals Market Share

Market Breakup by Type

Fertilisers remain a critical component of the Australia agrochemicals market, driven by their proven ability to enhance soil fertility and crop yields through essential nutrients such as nitrogen, phosphorus, and potassium. These inputs support agricultural productivity, food security, and sustainable farming outcomes. The University of Melbourne's October 2022 launch of a research hub targeting fertiliser efficiency reflects national efforts to reduce farmer costs and environmental impacts by improving nitrogen use and advancing fertiliser technology.

Australia's demand for crop protection chemicals is propelled by the need to mitigate crop losses from pests, diseases, and weeds. Pesticides, herbicides, and fungicides collectively support higher yields, post-harvest preservation, and efficient land use. These inputs contribute to a 40% increase in crop output and boost national food production value by AUD 13 billion annually, underpinning safe, high-quality food and fibre supply. The sector remains integral to Australia's agribusiness performance and global food competitiveness.

Market Breakup by Application

According to the Australia agrochemicals market report, crop protection chemicals are essential in safeguarding cereal and grain crops, such as wheat, barley, and oats, from pests, diseases, and weeds. They enhance yields, minimise crop losses, and improve product quality, thereby reinforcing domestic food security and export performance. The USDA estimates oat production at 1.1 million tonnes for 2023/24, highlighting the strategic importance of agrochemical efficacy in supporting national yield stability and market competitiveness.

In Australia's oilseeds and pulses sector, including canola, soybeans, and chickpeas, agrochemicals enable efficient pest and weed control, improving yield stability and crop quality. These inputs are essential in maintaining high productivity and ensuring global market competitiveness. The USDA reports that wheat production for MY2023/24 reached 26 million metric tonnes, reflecting the agricultural scale supported by agrochemical solutions across diverse crop types. Their adoption remains a critical driver for revenue generation and agronomic resilience.

Australia Agrochemicals Market Regional Insights

New South Wales Agrochemicals Market Overview

New South Wales has a strong agrochemicals market, driven by its significant agricultural output, especially in crops like wheat and cotton. This ensures high demand for crop protection, fostering productivity and economic growth. In 2023, the Department of Primary Industries (DPI) encouraged nutrient-efficient fertilisers to reduce environmental impact and enhance crop quality.

Queensland Agrochemicals Market Trends

The agrochemicals market in Queensland is driven by high demand for pest and weed control, particularly in sugarcane and tropical crops. This increases the use of herbicides and pesticides, improving crop quality and yields. In 2023, the Department of Agriculture and Fisheries (DAF) advocated sustainable nutrient management to support local farming.

Western Australia Agrochemicals Market Dynamics

Western Australia's agrochemicals market is influenced by wheat and barley production, increasing demand for fungicides and herbicides to protect crops. This boosts agricultural productivity and export potential. The Australian Government projected a 24% rise in winter crop production in 2024/25, reaching 18.4 million tonnes, surpassing the 10-year average of 17.2 million tonnes.

Victoria Agrochemicals Market Drivers

Victoria benefits from the agrochemicals market through enhanced agricultural productivity driven by innovation in crop protection and nutrient efficiency. The region's diverse farming landscape supports high adoption of bio-based and precision-applied agrochemicals, fostering yield improvements and economic growth. Market dynamics also favour sustainable practices, aligning with policy-driven environmental and export standards.

Australian Capital Territory Agrochemicals Market Opportunities

In the Australian Capital Territory, agrochemical market benefits stem from policy innovation, research funding, and regulatory frameworks that support safe and effective chemical use. Though less agriculturally intensive, the ACT drives national strategies for agrochemical adoption, promoting sustainable land management and serving as a hub for governance, compliance, and agri-tech collaboration.

Competitive Landscape

The Australia agrochemicals market key players offer a broad range of agricultural solutions, including herbicides, fungicides, and insecticides, designed to boost crop productivity and sustainability. These companies focus on providing sustainable products that enhance agricultural efficiency and food security while promoting environmental

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sustainability through innovative crop protection solutions. Key Industry Players BASF Australia Ltd.: Headquartered in Melbourne, Australia, BASF Australia Ltd. was established in 1969. It is a leading provider of agricultural solutions, offering a wide range of agrochemicals, including herbicides, fungicides, and insecticides, aimed at enhancing crop productivity and sustainability in Australian agriculture. Bayer CropScience Pty Ltd.: Bayer CropScience Pty Ltd., based in Melbourne, Australia, and founded in 2002, is a global leader in crop protection, offering innovative solutions for pest, weed, and disease control. The company focuses on providing sustainable products to improve agricultural productivity and food security. Syngenta Crop Protection AG: Syngenta Crop Protection AG, established in 2000 and headquartered in Switzerland, is a leading agrochemical company in Australia. It specializes in innovative crop protection products, including herbicides, fungicides, and insecticides, to enhance agricultural efficiency and environmental sustainability. Corteva Agriscience: Corteva Agriscience was founded in 2019 and is headquartered in Delaware, United States. The company is a key player in the Australian agrochemical market, offering integrated solutions in crop protection, seeds, and digital agriculture, focused on increasing farm productivity and promoting sustainable practices. Other key players in the Australia agrochemicals market report are FMC Australasia Pty Ltd., Adama Agricultural Solutions Ltd., Nufarm Limited, Yara Australia Pty. Ltd., and Nutrien Ltd., among others.

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