Crop Protection Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-01-16 | 120 pages | Mordor Intelligence

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Report description:

Crop Protection Chemicals Market Analysis

The crop protection chemicals market is expected to grow from USD 104.83 billion in 2025 to USD 109.67 billion in 2026 and is forecast to reach USD 137.49 billion by 2031 at 4.62% CAGR over 2026-2031. Steady demand for herbicide-intensive, genetically modified crops, the adoption of precision agriculture, and climate-driven pest migration continue to sustain the growth curve, despite tighter regulatory oversight. Precision sprayers, drone-based spot treatments, and variable-rate application systems enable growers to cut waste while maintaining efficacy, helping the crop protection chemicals market capture productivity gains even in regions facing labor shortages. South America accounts for the largest share, driven by Brazil's expansion of soybean production, while the Asia-Pacific region records the fastest CAGR, largely due to commercial farming consolidation in India and China. Foliar treatments remain the most common delivery mode, yet soil treatments post the highest growth, and regenerative practices encourage pre-emergent chemistries.

Global Crop Protection Chemicals Market Trends and Insights

GM-Crop Acreage Expansion

Herbicide-tolerant soybeans, corn, and cotton now dominate planting decisions in the Americas, lifting per-hectare chemical intensity even as overall farmland expands. Brazil planted GM soybeans on 95% of its area in 2024, which propelled glyphosate and dicamba sales to record highs. Growers stack multiple modes of action to delay resistance, favoring suppliers with integrated

seed and chemical bundles that lock in season-long revenue. Argentina's approval of HB4 drought-tolerant soybeans further broadens the addressable acreage, especially in marginal regions that have been historically constrained by water stress. As patents expire, branded players accelerate the development of trait-plus-chemistry packages to protect their margins, while generic manufacturers focus on increasing volume in off-patent actives. Collectively, the GM wave sustains herbicide demand, supports premium pricing on combination products, and drives incremental investments in formulation technologies tailored to trait packages.

Rising Herbicide-Resistant Weeds

Glyphosate-resistant Palmer amaranth has spread to 27 U.S. states and is advancing across South America, forcing growers to rotate chemistries and increase application frequency. Resistant biotypes now challenge ALS inhibitors as well, making two- to four-way tank mixes the new norm. This resistance arms race elevates demand for novel modes of action and premium premixes that simplify stewardship. Chemical innovation pipelines regain urgency after a slow decade, while digital scouting tools gain traction to pinpoint outbreaks before they become unmanageable. The economic burden of higher herbicide costs per acre and potential yield loss keeps growers willing to pay for solutions that restore control, giving innovators a clear revenue runway in the near term.

Stringent Pesticide Bans and MRL Tightening (European Union focus)

European authorities continue to review active ingredients, with 15 key chemistries set to lose renewal in 2024, while maximum residue limits are being steadily lowered. Export-oriented producers in South America and Africa now face compliance costs to meet EU tolerances, even when selling to other destinations, because global grain buyers conform to the strictest standards. Smaller manufacturers struggle to finance new data packages, accelerating market share gains for top-tier firms that can invest in toxicology and environmental dossiers. Growers switch to newer, more expensive actives that carry lower residue profiles, lifting per-hectare spend but squeezing margins when commodity prices soften. Missing tools force some farmers to revert to older, more frequent applications, paradoxically increasing the overall chemical load despite the policy intent. Research priorities shift toward bio-based or low-residue molecules, lengthening development timelines and raising the bar for entry. The combined regulatory and commercial pressure subtracts 0.8 percentage points from the forecast CAGR, with the sharpest revenue impact projected to arrive before 2027 as grace periods expire. Companies with robust EU regulatory teams and pipeline actives positioned for fast approval gain a relative advantage under the new rules.

Other drivers and restraints analyzed in the detailed report include:

Adoption of Precision-Ag TechnologiesRapid Growth of Commercial Farming in Asia-Pacific and South AmericaFast Uptake of Biologicals Cannibalizing Synthetic Sales

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

Segment Analysis

Herbicide captured a 42.35% market share of the crop protection chemicals market in 2025, representing the largest slice of the market size and generating the bulk of incremental revenue growth. Persistent resistance in Palmer amaranth and Conyza species necessitates multi-site programs, prompting growers to adopt stacked formulations that carry premium price points. Glyphosate still dominates the volume, but demand is increasingly shifting to HPPD inhibitors, PPO inhibitors, and new proprietary chemistries positioned for post-resistance control. The resulting mix upgrade underpins a robust 5.02% CAGR forecast to 2031.

Continued GM trait adoption, especially in Brazil and Argentina, sustains high herbicide intensity per hectare. Integrated

seed-and-chemical offerings allow leading suppliers to bundle traits with tailored sprays, protecting both intellectual property and gross margins. Fungicides hold roughly significant share, supported by weather-linked disease flare-ups and the 2024 launch of Revysol in Brazil, which offers a new mode of action against soybean rust. Insecticides are seeing sporadic spikes when climate-driven pest incursions occur. Nematicides and molluscicides remain niche but essential for high-value horticulture, where even minor yield losses undermine profitability.

The Crop Protection Chemicals Market Report is Segmented by Function (Fungicide, Herbicide, Insecticide, Molluscicide, and More), Application Mode (Chemigation, Foliar, Seed Treatment, and More), Crop Type (Commercial Crops, Fruits & Vegetables, Grains & Cereals, Pulses & Oilseeds, and More), and Geography (Africa, Europe, North America, and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

Geography Analysis

South America accounted for 41.85% of the crop protection chemicals market share in 2025, driven by Brazil's extensive soybean and corn production in the Cerrado savanna. Brazil alone consumed over 60% of the regional volume, supported by record pesticide purchases for consecutive planting cycles during the 2024 season. Argentina's export-focused farms contributed to growth, with genetically modified (GM) crop adoption surpassing 95% of national acreage, reinforcing herbicide-intensive farming practices. Favorable weather conditions and government policies prioritizing foreign exchange earnings have supported steady growth in South America, despite occasional logistical challenges at ports.

The Asia-Pacific region is the fastest-growing market, with a compound annual growth rate (CAGR) of 4.73% projected through 2031. Growth is driven by land consolidation and increased mechanization in countries such as India, China, and Southeast Asia. In India, commercial farming initiatives led to a 15% increase in chemical usage in 2024, as larger field sizes required season-long pest control programs. In China, environmental policies have prompted pesticide plant consolidation while encouraging the use of higher-efficacy, lower-residue chemicals that align with national food safety standards. Additionally, Indonesia, Thailand, and Vietnam have contributed to incremental demand through expanding palm oil and intensive rice farming systems, which rely on specialized fungicides and insecticides to protect crops in humid climates.

North America represents a significant portion of global consumption, supported by the adoption of precision agriculture, which now covers 35% of large farms and optimizes application timing. In the United States, high GM-crop acreage and increasing weed resistance have sustained per-acre herbicide expenditures, despite tight profit margins. Europe accounts for a substantial share of demand, but stringent regulations and residue limits have shifted investments toward low-dose chemistries and biological solutions. Despite these restrictions, the specialty fruit and vegetable segments maintain high market value. Africa remains the smallest regional market; however, commercial farming projects in South Africa and emerging hubs in West Africa are beginning to adopt modern crop protection programs, indicating a gradual increase in long-term demand.

List of Companies Covered in this Report:

BASF SE Bayer AG Corteva Inc. FMC Corporation Jiangsu Yangnong Chemical Group Co., Ltd. Nufarm Limited Sumitomo Chemical Co., Ltd. Syngenta Group Co., Ltd. UPL Ltd. Lallemand Inc. (Animal Nutrition) EW Nutrition GmbH Kemin Industries Inc. Novus International Inc. Vitafor N.V.

Additional Benefits:

 The market estimate (ME) sheet in Excel format
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