

## **Brazil Biostimulants - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)**

Market Report | 2026-02-09 | 80 pages | Mordor Intelligence

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### **Report description:**

Brazil Biostimulants Market Analysis

The Brazil biostimulants market is expected to grow from USD 338.8 million in 2025 to USD 374.77 million in 2026 and is forecast to reach USD 621.2 million by 2031 at 10.62% CAGR over 2026-2031. Market momentum is sustained by Brazil's National Bio-inputs Program, which targets biological input use across 13 million hectares and aligns with the federal Plano ABC+ low-carbon agriculture credit line of BRL 400.59 billion (USD 75.1 billion) for the 2024 crop year. Wider enforcement of residue limits in the European Union and the United States elevates demand for residue-free crop enhancements, while Embrapa research confirms notable yield gains on degraded Cerrado soils when humic and protein hydrolysate products are applied. Domestic cooperatives consolidate bulk purchases, lowering per-unit costs and facilitating technical support, and carbon-credit pilots rewarding nitrous-oxide abatement add an incremental revenue stream that strengthens the economic case for adoption. Although biostimulants carry a 2-to-4-fold premium over synthetics, precision-agriculture platforms that index product placement to soil and satellite data improve cost-effectiveness and broaden the addressable farm base.

Brazil Biostimulants Market Trends and Insights

Government Subsidies for Sustainable Farming

Federal policy architecture through Plano ABC+ creates systematic adoption incentives by reducing borrowing costs for farms implementing biological inputs, with the program allocating BRL 400.59 billion (USD 75.1 billion) in agricultural credit for the

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2024-25 season. The program's effectiveness stems from its integration with existing cooperative financing structures, enabling bulk procurement arrangements that reduce per-unit costs while maintaining quality standards through certified supplier networks. This approach addresses the traditional cost barrier that limited biostimulant adoption to premium crop segments, expanding accessibility to commodity grain producers who represent the majority of Brazil's agricultural area.

#### Rising Demand for Certified Export Horticulture

European Union and United States residue limit enforcement creates mandatory adoption dynamics for export-oriented horticulture, particularly affecting Brazil's USD 4.2 billion fruit and vegetable export sector. The regulatory pressure extends beyond direct residue concerns to encompass sustainability certification requirements, with major importers implementing supplier scorecards that evaluate biological input usage as a key performance indicator. This trend particularly benefits seaweed extract and amino acid segments, which provide residue-free crop enhancement solutions while supporting organic certification pathways required for premium market access.

#### Cost Competitiveness Challenges Limit Mass Market Penetration

Biostimulants command 2-4 times the per-hectare cost of synthetic nutrient alternatives, creating adoption barriers particularly among price-sensitive commodity crop producers who operate on thin profit margins. The cost differential becomes more pronounced during periods of commodity price volatility, when farmers prioritize essential inputs over enhancement products that provide incremental rather than fundamental yield benefits. This pricing dynamic concentrates adoption within premium crop segments and larger operations that can absorb higher input costs while capturing value through improved crop quality and market premiums. Ministry of Agriculture and Livestock (Ministerio da Agricultura e Pecuaria) MAPA's regulatory framework under IN 61/2020 requires extensive efficacy documentation that increases development costs, contributing to premium pricing structures that limit market accessibility.

Other drivers and restraints analyzed in the detailed report include:

Soil Degradation Driving Biological Inputs Expansion of Cooperatives in Center-West Regulatory Approval Delays

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

#### Segment Analysis

The seaweed extracts segment controlled 58.42% of the Brazil biostimulants market share in 2025, while the fastest growing segment is amino acids with 13.45% CAGR. Seaweed extracts followed as multivalent inputs that deliver abiotic-stress mitigation alongside micronutrients, yet the feedstock bottleneck stemming from Chilean and Canadian imports capped near-term volume gains. Brazil's extensive 8,000-kilometer coastline, characterized by coral reefs and highly diversified ecosystems, provides significant potential for seaweed cultivation and extraction, ensuring a steady supply of raw materials for this segment. Together, humic, fulvic, and protein-hydrolysate products capture soil-health and root-development niches, particularly in the degraded Cerrado corridor.

Across the forecast window, seaweed-extract players are investing in marine-aquaculture pilots along the Santa Catarina coast to de-risk import exposure, a move that could compress final prices by 6-8% once scale is achieved. Meanwhile, protein-hydrolysate suppliers pursue waste-stream valorization from Brazil's poultry industry, turning processing by-products into plant-available amino-acid blends. Such circular-economy positioning resonates with sustainability metrics embedded in cooperative and exporter procurement policies, reinforcing demand visibility for this segment and enlarging the Brazil biostimulants market.

The Brazil Biostimulants Market Report is Segmented by Form (Amino Acids, Fulvic Acid, Humic Acid, Protein Hydrolysates, Seaweed Extracts, and Other Biostimulants), and by Crop Type (Cash Crops, Horticultural Crops, and Row Crops). The Market Forecasts are Provided in Terms of Value (USD), and Volume (Metric Tons).

List of Companies Covered in this Report:

FMC Corporation Coromandel International Ltd Valent Biosciences LLC Atlantica Agricola Andermatt Group AG Corteva Agriscience Koppert Biological Systems Inc. Lallemand Inc. UPL Ltd BASF SE Bayer AG (Crop Science) Syngenta AG Biotrop Solucoes Biologicas Valagro Humic Growth Solutions Inc. Trade Corporation International Rizobacter Argentina S.A. Vittia Group

Additional Benefits:

The market estimate (ME) sheet in Excel format

3 months of analyst support

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