Brazil Crop Protection Chemicals - 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 Crop Protection Chemicals Market Analysis

Brazil crop protection chemicals market size in 2026 is estimated at USD 36.06 billion, growing from 2025 value of USD 34.46 billion with 2031 projections showing USD 45.23 billion, growing at 4.64% CAGR over 2026-2031. The strong export-oriented expansion of soybeans and corn, combined with rising pest resistance and drone-enabled precision farming, sustains steady demand for synthetic formulations. Fast-track generic approvals, enacted under Law 14.785/2023, compress the time-to-market and intensify price competition, while currency swings raise the cost of imported active ingredients and encourage the development of local formulation capacity. Growth in soil treatment and seed-applied products reflects tighter environmental rules and farmer adoption of integrated pest management. Fragmented competitive dynamics favor both global innovators and nimble domestic firms that tailor solutions to Brazil's diverse agro-climatic zones.

Brazil Crop Protection Chemicals Market Trends and Insights

Expansion of Soybean and Corn Acreage

Soybean plantings in the Cerrado reached around 45.2 million hectares in 2024, a 3.1% rise year-on-year. Newly converted land demands higher application rates as growers battle virgin-soil pests, necessitating diverse chemical portfolios across two crop cycles per year. Safrinha corn follows soybeans on the same fields and doubles spray rounds, lifting per-hectare spending on herbicides, fungicides, and seed treatments. Compliance with MAPA (Department of Agriculture, Livestock, and Food Supply)

rotation guidelines obliges farmers to alternate modes of action, thereby further widening the demand for branded and generic actives. Export-linked certifications enhance the use of premium, low-residue products and biological complements, solidifying Brazil's crop protection chemicals market as a core input partner for Cerrado agribusiness.

Herbicide-resistant Weeds Driving Higher-dose Combination Products

Resistance now affects around 15.8 million hectares, with glyphosate-tolerant palmer amaranth and sourgrass most problematic. Farmers increasingly adopt pre-mixes that blend auxin mimics, ACCase inhibitors, and photosystem blockers, lifting chemical costs by 25-40% per hectare. ANVISA cleared 47 new mixtures in 2024, geared toward resistance management, enabling suppliers to command premium margins while safeguarding yields. Continuous cropping and no-till practices accelerate resistance spread, reinforcing demand for novel chemistry and stewardship programs that embed digital recommendation tools. These dynamics propel combination product volumes and sustain price resilience in the Brazil crop protection chemicals market.

ANVISA Toxicity Reassessments and Active Bans

Twenty-seven actives, including paraquat and certain 2,4-D salts, lost approval in 2024 . Sudden withdrawals unsettle supply chains and oblige farmers to reconfigure programs, often at higher cost per hectare. Manufacturers bear write-offs on inventories and must channel R&D funds into safer replacements while forecasting future regulatory shifts. Although new combinations partly offset lost volume, uncertainty delays investment decisions and can slow rollout of innovative chemistry, tempering the Brazil crop protection chemicals market growth in the near term.

Other drivers and restraints analyzed in the detailed report include:

Fast-track Registration of Generics Lowering PricesDrone-based Ultra-Low-Volume Spraying AdoptionCommunity Lawsuits Over Spray Drift Near Frontier Areas

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

Segment Analysis

Insecticides generated 47.35% of 2025 revenue as continuous cropping sustains fall armyworm and stink bug outbreaks. This dominance anchors volume stability for the Brazil crop protection chemicals market. Fungicides reflect persistent soybean rust and corn leaf blight threats. Herbicides captured significant share, constrained by growing resistance yet indispensable to no-till systems that cut soil erosion. Molluscicides expand at 8.45% CAGR owing to slug proliferation under conservation tillage. Regulatory pressure favors safer actives, prompting suppliers to reformulate legacy molecules.

Second-generation insecticide chemistries, including diamides and spinosyns, gain share as resistance erodes pyrethroid efficacy. Companies bundle insecticides with proprietary adjuvants to enhance leaf coverage and rainfastness, differentiating offerings in an otherwise price-intensive landscape. Fungicide innovation focuses on triazole-SDHI mixtures that extend residual control, key for elongated wet seasons. Herbicide portfolios shift toward pre-emergence and residual products integrated with cover crop systems. Molluscicide newcomers emphasize low-dose metaldehyde replacements to satisfy stricter environmental norms. These trends collectively reinforce product diversity and sustain the breadth of the Brazil crop protection chemicals market.

The Brazil Crop Protection Chemicals Market Report is Segmented by Function (Fungicide, Herbicide, Insecticide, and More), by Application Mode (Chemigation, Foliar, Fumigation, and More), and by Crop Type (Commercial Crops, Fruits and Vegetables, and More). The Report Offers Market Size and Forecasts in Terms of Value (USD) and Volume (Metric Tons).

List of Companies Covered in this Report:

Syngenta Group Bayer AG Corteva Agriscience FMC Corporation BASF SE American Vanguard Corporation Sumitomo Chemical Co., Ltd. UPL Limited Zhejiang Wynca Chemical Group Co., Ltd. Nortox S.A. Ourofino AgrociA□ncia Albaugh, LLC IHARA Nufarm Sipcam Nichino Brasil S.A. (Sipcam-Oxon SpA and Nihon Nohyaku Co., Ltd.)

Additional Benefits:

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

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