

Global Biorational Fungicides Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Biorational Fungicides market size is expected to reach \$ 18342 million by 2032, rising at a market growth of 8.6% CAGR during the forecast period (2026-2032).

Biorational fungicides are a class of plant disease control products derived from natural sources, characterized by a specific mechanism of action against target pathogens while significantly reducing negative impacts on non-target organisms and the ecological environment. ASTM International has established biorational products as a comprehensive terminology set covering categories including biopesticides, microbial agents, and plant extracts. Within the international regulatory framework, the U.S. Environmental Protection Agency has incorporated biopesticides into the core scope of biorational products through statutory definitions, clearly distinguishing their regulatory attributes from those of traditional chemical pesticides. From the perspective of product type analysis, biorational fungicides can be divided into three major categories: living biological control agents, microbial and botanical extracts, and basic substances. Living biological control agents include living microorganisms such as *Bacillus* species, *Trichoderma* species, and yeasts, which inhibit pathogens through multiple mechanisms including parasitism, secretion of antimicrobial metabolites, and competitive exclusion. Microbial and botanical extracts contain no living organisms, with their active ingredients being microbial fermentation metabolites or plant essential oil extracts. The basic substances category encompasses compounds with simple chemical structures and recognized safety characteristics, including copper-based products, sulfur-based products, chitosan, and calcium salts.

Market Development Opportunities and Key Drivers

The global agricultural transition toward sustainable production models serves as the

core engine driving growth in the biorational fungicide market. The demand to reduce chemical pesticide residues and delay the development of pathogen resistance has established a long-term foundational market. Advances in microbial strain screening technologies and new formulation development have significantly improved product efficacy stability, while advanced formulation techniques such as microencapsulation have enhanced field residual activity and rainfastness. The regulatory environment has become increasingly favorable. Major agricultural regions have established or are improving simplified registration pathways for biopesticides, with reduced data requirements and MRL exemption mechanisms creating policy windows for product commercialization. The continued expansion of organic farming acreage has opened exclusive application spaces for biorational fungicides, and consumer preference for residue-free produce is accelerating the substitution of traditional chemical fungicides.

Market Challenges and Risks

The core challenge facing the biorational fungicide industry is the significant influence of environmental factors on field efficacy stability. The antimicrobial activity of living biological control agents is highly dependent on temperature, humidity, and crop microenvironment at the time of application, with variable climatic conditions potentially leading to batch-to-batch performance differences. The prophylactic positioning requires users to possess disease forecasting capabilities and precise application timing skills, with a steep learning curve limiting large-scale adoption in labor-intensive regions with limited knowledge infrastructure. Most products exhibit high specificity toward target pathogens, making single-product coverage difficult in complex disease scenarios and forcing growers to adopt multi-product combination strategies. On the raw material supply front, botanical extracts depend on the geographical distribution and harvest seasons of specific plant resources, while microbial fermentation faces dual pressures from strain degradation and fluctuating culture medium costs.

Downstream Demand Trends

The horticultural crops sector is emerging as the core engine of demand growth. Compliance pressure from zero-residue standards in export markets for high-value cash crops such as table grapes, strawberries, and tomatoes is driving growers to integrate biorational products into comprehensive disease management programs. The controlled microenvironments of greenhouse and hydroponic systems facilitate the colonization and efficacy of living biological control agents, with increasing demand for microbial agents possessing both disease control and plant growth promotion functions. Organic agriculture certification systems create insurmountable market access barriers for

biorational fungicides, with certified products transitioning from niche markets to large-scale cultivation sectors. Strict residue management requirements in wine grape vineyards promote the standardized application of copper-based products and microbial products such as *Bacillus subtilis*. The rise of home gardening and urban agriculture has expanded consumption scenarios for biorational fungicides, with small-packaged ready-to-use products reaching non-professional users through retail channels, a trend particularly notable in North America and Europe.

Regional Trends

North America maintains global leadership in product commercialization and standardization management of biorational fungicides, supported by a mature biopesticide registration framework and large-scale horticultural cultivation base. The Biopesticides Office of the U.S. Environmental Protection Agency has established clear approval pathways, simplifying market access for new microbial and botanical strains. The European market holds institutional advantages in regulatory definition of biorational products and promotion of organic farming practices, with Common Agricultural Policy fiscal subsidy mechanisms for green control technologies and national action plans for resistance management operating synergistically to stimulate regional innovation and application diffusion. The Asia-Pacific region is becoming the most dynamic area for biorational fungicide demand growth. The export-oriented cultivation models of China, India, and Southeast Asian countries drive import demand for mid-to-high-end biorational products, while the rapid emergence of local fermentation and botanical extraction enterprises is reshaping regional supply patterns. Latin America presents a bifurcated trend. On one hand, the soybean and corn belts of Brazil and Argentina continue to rely on broad-spectrum synthetic fungicides. On the other hand, the table grape and blueberry export sectors of Chile and Peru are accelerating their transition toward biorational solutions to meet North American and European market access standards.

This report studies the global Biorational Fungicides production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Biorational Fungicides and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Biorational Fungicides that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Biorational Fungicides total production and demand, 2021-2032, (Kilotons)

Global Biorational Fungicides total production value, 2021-2032, (USD Million)

Global Biorational Fungicides production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Biorational Fungicides consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Biorational Fungicides domestic production, consumption, key domestic manufacturers and share

Global Biorational Fungicides production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Biorational Fungicides production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Biorational Fungicides production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Biorational Fungicides market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BASF, Bayer, Syngenta, Sumitomo Biorational, Corteva, Bioceres, Koppert, Am?ba, Russell IPM, Kumiai Chemical, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Biorational Fungicides market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (USD/MT) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Biorational Fungicides Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Biorational Fungicides Market, Segmentation by Type:

Botanical Biorational Fungicide

Microbial Biorational Fungicide

Non-organic Biorational Fungicide

Global Biorational Fungicides Market, Segmentation by Mechanistic Principle:

Antibiosis Biorational Fungicide

Competition Biorational Fungicide

Mycoparasitism Biorational Fungicide

Global Biorational Fungicides Market, Segmentation by Physical Form:

Powder Biorational Fungicide

Granule Biorational Fungicide

Capsule Biorational Fungicide

Oil Emulsion Biorational Fungicide

Global Biorational Fungicides Market, Segmentation by Application:

Fruit Cultivation

Vegetable Cultivation

Field Crop Cultivation

Ornamental Plant Cultivation

Companies Profiled:

BASF

Bayer

Syngenta

Sumitomo Biorational

Corteva

Bioceres

Koppert

Amo?ba

Russell IPM

Kumiai Chemical

Certis Biologicals

FMC Corporation

SAN Agrow

STK Bio-Ag

IPL Biologicals

SOM Phytopharma

Andermatt Biocontrol

Lukang Biological Pesticide

Yangzhou Luyuan Biochemical

Kernel Bio-tech

Yangnong Chemical

Hailir

Key Questions Answered:

1. How big is the global Biorational Fungicides market?
2. What is the demand of the global Biorational Fungicides market?
3. What is the year over year growth of the global Biorational Fungicides market?
4. What is the production and production value of the global Biorational Fungicides market?
5. Who are the key producers in the global Biorational Fungicides market?
6. What are the growth factors driving the market demand?

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