

Global Fourth Generation Insecticide Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

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Abstracts

According to our (Global Info Research) latest study, the global Fourth Generation Insecticide market size was valued at US\$ 1911 million in 2025 and is forecast to a readjusted size of US\$ 2555 million by 2032 with a CAGR of 4.2% during review period.

Fourth Generation Insecticides, as defined in this report, refer to neonicotinoid insecticides that control pests by acting as competitive modulators of insect nicotinic acetylcholine receptors. The market includes imidacloprid, acetamiprid, thiamethoxam, clothianidin, dinotefuran, nitenpyram, and thiacloprid. These insecticides generally feature relatively low application rates, systemic movement within plants, comparatively long residual activity, and strong efficacy against sucking pests. Commercial formulations include suspension concentrates, water-dispersible granules, soluble concentrates, soluble powders, granules, and seed treatment products. Key upstream materials include chloropyridinyl intermediates, chlorothiazolyl intermediates, furan intermediates, nitroguanidine and cyanoamidine intermediates, methylamine, solvents, catalysts, dispersants, wetting agents, and carrier materials. Major manufacturing steps include heterocyclic intermediate synthesis, substitution or condensation, crystallization and purification, drying, milling, formulation blending, and granulation. Major downstream customers include pesticide formulators, seed treatment companies, agricultural input distributors, farming cooperatives, commercial farms, horticultural producers, and public health pest-control organizations. The products are used to control aphids, whiteflies, planthoppers, leafhoppers, thrips, beetles, and soil pests in rice, wheat, corn, cotton, oilseeds, fruits, and vegetables. On a finished-product factory-gate basis and measured in 100% active ingredient equivalent, global effective capacity is estimated at approximately 126,000 tonnes in 2025, with sales volume of around 93,600 tonnes and an average selling price of approximately USD 19,840 per tonne.

The industry's average gross margin is estimated at approximately 22%-34%.

The global Fourth Generation Insecticide market has moved from a patent-driven development stage into a mature structure in which originator brands and generic active ingredients coexist. Bayer, Syngenta, Nippon Soda, Sumitomo Chemical, and Mitsui Chemicals Crop & Life Solutions continue to control major originator molecules, global registrations, branded formulations, and seed treatment channels. China has become a major manufacturing base for imidacloprid, acetamiprid, thiamethoxam, clothianidin, and selected dinotefuran products, while Indian companies are expanding their supply of generic technical materials and formulations. As most core molecules are now mature, price competition is relatively intense in the technical active ingredient segment, and competitive advantage is shifting toward backward integration into key intermediates, impurity control, supply reliability, international registrations, and formulation development. Demand remains supported by a broad agricultural application base. Neonicotinoids are used through seed treatment, foliar spraying, soil treatment, and root drenching to control sucking pests and selected soil pests in rice, wheat, corn, cotton, oilseeds, fruits, vegetables, and horticultural crops. Food production requirements, pest pressure, and increasing agricultural intensification in Asia, Latin America, and other emerging markets will continue to support incremental demand. However, mature products such as imidacloprid have already reached relatively high penetration, meaning that the market is expected to shift from rapid expansion toward moderate growth. Seed treatment, high-value fruit and vegetable crops, protected cultivation, and selected public health applications are expected to remain comparatively resilient. Product development will increasingly focus on high-purity technical materials, lower levels of undesirable impurities, water-based formulations, reduced solvent content, and more precise application. Seed treatment formulations must improve coating uniformity, dust-off control, seed safety, and low-temperature storage stability, while foliar and soil products increasingly require better suspension stability, dispersibility, rainfastness, and reduced active ingredient use per hectare. Resistance in planthoppers, whiteflies, aphids, and other pests is also encouraging the development of combination formulations with insecticides from different mode-of-action groups. However, resistance management cannot rely solely on mixtures and requires rotation among different numbered mode-of-action groups to avoid exposing consecutive pest generations to Group 4 insecticides. Long-term market development will remain constrained by risks to pollinators and other non-target organisms, increasing pest resistance, maximum residue limits, and differences in regional regulation. The European Union has prohibited all outdoor uses of imidacloprid, thiamethoxam, and clothianidin and has not renewed the approval of thiacloprid, while the US Environmental Protection Agency continues registration reviews and pollinator risk-

management work for major neonicotinoids. Future growth will therefore depend less on simple volume expansion of established molecules and more on geographic market shifts, preservation of compliant uses, lower-risk application practices, and improvements in product mix. Suppliers with integrated intermediate and active ingredient production, international registration portfolios, residue and ecological risk data, low-dust seed treatment technologies, and diversified regional supply chains are expected to gain share as the industry consolidates.

This report is a detailed and comprehensive analysis for global Fourth Generation Insecticide market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets. Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

Key Features:

Global Fourth Generation Insecticide market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fourth Generation Insecticide market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fourth Generation Insecticide market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Fourth Generation Insecticide market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

The Primary Objectives in This Report Are:

To determine the size of the total market opportunity of global and key countries

To assess the growth potential for Fourth Generation Insecticide

To forecast future growth in each product and end-use market

To assess competitive factors affecting the marketplace

This report profiles key players in the global Fourth Generation Insecticide market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Bayer AG, Syngenta Group, Nippon Soda, Sumitomo Chemical, Mitsui Chemicals Crop & Life Solutions, Hailir Pesticides and Chemicals Group, Shandong Sino-Agri United Biotechnology, Jiangsu Changqing Agrochemical, Nanjing Red Sun, Jiangsu Kesheng Group, etc.

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

Market Segmentation

Fourth Generation Insecticide market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

Market segment by Type

Imidacloprid

Acetamiprid

Thiamethoxam

Clothianidin

Other

Market segment by Heterocyclic Structure

Chloropyridinyl Type

Chlorothiazolyl Type

Furanicotinyl Type

Market segment by Formulation

Suspension Concentrates

Water-dispersible Granules

Soluble Concentrates

Other

Market segment by Application

Cereals and Grains

Oilseeds and Pulses

Fruits and Vegetables

Other

Major players covered

Bayer AG

Syngenta Group

Nippon Soda

Sumitomo Chemical

Mitsui Chemicals Crop & Life Solutions

Hailir Pesticides and Chemicals Group

Shandong Sino-Agri United Biotechnology

Jiangsu Changqing Agrochemical

Nanjing Red Sun

Jiangsu Kesheng Group

Limin Group

Bharat Rasayan

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

The content of the study subjects, includes a total of 15 chapters:

Chapter 1, to describe Fourth Generation Insecticide product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Fourth Generation Insecticide, with price, sales quantity, revenue, and global market share of Fourth Generation Insecticide from 2021 to 2026.

Chapter 3, the Fourth Generation Insecticide competitive situation, sales quantity,

revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Fourth Generation Insecticide breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Fourth Generation Insecticide market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Fourth Generation Insecticide.

Chapter 14 and 15, to describe Fourth Generation Insecticide sales channel, distributors, customers, research findings and conclusion.

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