

Global Fourth Generation Insecticide Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Fourth Generation Insecticide market size is expected to reach \$ 2555 million by 2032, rising at a market growth of 4.2% CAGR during the forecast period (2026-2032).

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 studies the global Fourth Generation Insecticide production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Fourth Generation Insecticide 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 Fourth Generation Insecticide that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Fourth Generation Insecticide total production and demand, 2021-2032, (Kilotons)

Global Fourth Generation Insecticide total production value, 2021-2032, (USD Million)

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

Global Fourth Generation Insecticide consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Fourth Generation Insecticide domestic production, consumption, key domestic manufacturers and share

Global Fourth Generation Insecticide production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Fourth Generation Insecticide production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Fourth Generation Insecticide production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

This report profiles key players in the global Fourth Generation Insecticide 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 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.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Fourth Generation Insecticide market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Kilotons) and average price (US\$/Ton) 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 Fourth Generation Insecticide Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Fourth Generation Insecticide Market, Segmentation by Type:

Imidacloprid

Acetamiprid

Thiamethoxam

Clothianidin

Other

Global Fourth Generation Insecticide Market, Segmentation by Heterocyclic Structure:

Chloropyridinyl Type

Chlorothiazolyl Type

Furanicotinyl Type

Global Fourth Generation Insecticide Market, Segmentation by Formulation:

Suspension Concentrates

Water-dispersible Granules

Soluble Concentrates

Other

Global Fourth Generation Insecticide Market, Segmentation by Application:

Cereals and Grains

Oilseeds and Pulses

Fruits and Vegetables

Other

Companies Profiled:

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

Key Questions Answered:

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

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