

Global Biorational Fungicides Market Growth 2026-2032

<https://marketpublishers.com/r/G0000E8F72B9EN.html>

Date: July 2026

Pages: 157

Price: US\$ 3,660.00 (Single User License)

ID: G0000E8F72B9EN

Abstracts

The global Biorational Fungicides market size is predicted to grow from US\$ 9509 million in 2025 to US\$ 17960 million in 2032; it is expected to grow at a CAGR of 9.1% from 2026 to 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.

LP Information, Inc. (LPI) ' newest research report, the "Biorational Fungicides Industry Forecast" looks at past sales and reviews total world Biorational Fungicides sales in 2025, providing a comprehensive analysis by region and market sector of projected Biorational Fungicides sales for 2026 through 2032. With Biorational Fungicides sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Biorational Fungicides industry.

This Insight Report provides a comprehensive analysis of the global Biorational

Fungicides landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Biorational Fungicides portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Biorational Fungicides market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Biorational Fungicides and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Biorational Fungicides.

This report presents a comprehensive overview, market shares, and growth opportunities of Biorational Fungicides market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

Botanical Biorational Fungicide

Microbial Biorational Fungicide

Non-organic Biorational Fungicide

Segmentation by Mechanistic Principle:

Antibiosis Biorational Fungicide

Competition Biorational Fungicide

Mycoparasitism Biorational Fungicide

Segmentation by Physical Form:

Powder Biorational Fungicide

Granule Biorational Fungicide

Capsule Biorational Fungicide

Oil Emulsion Biorational Fungicide

Segmentation by Application:

Fruit Cultivation

Vegetable Cultivation

Field Crop Cultivation

Ornamental Plant Cultivation

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Biorational Fungicides market?

What factors are driving Biorational Fungicides market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Biorational Fungicides market opportunities vary by end market size?

How does Biorational Fungicides break out by Type, by Application?

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