

Global Nematicides Market Growth 2026-2032

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Abstracts

The global Nematicides market size is predicted to grow from US\$ 1389 million in 2025 to US\$ 1895 million in 2032; it is expected to grow at a CAGR of 4.4% from 2026 to 2032.

In 2025, global Nematicides production reached approximately 167059 tons, with an average global market price of around USD 8500 per ton.

The gross profit margin of major companies in the industry was approximately 18%–25%.

In 2025, global production capacity of Nematicides was approximately 210000 tons.

Nematicides are chemical or biological crop protection agents specifically formulated to suppress and control plant-parasitic nematode populations in agricultural soils. Core functions include contact killing, systemic control, egg suppression, and root-zone protection. Main applications are in high-value row crops, vegetables, fruits, and specialty plantations. This definition excludes general-purpose broad-spectrum insecticides, fungicides, soil fumigants for non-agricultural uses, application equipment, or post-harvest pest control products.

The industrial chain of Nematicides includes upstream raw materials such as organophosphates, carbamates, abamectin, and biological fermentation substrates. Midstream covers synthesis, formulation, granulation, emulsification, and packaging. Downstream applications mainly include cash crop growers, large-scale row crop farms, and specialty crop producers.

The global nematicides market is undergoing a significant transformation, driven by the intensifying pressure of crop pests and the tightening regulatory environment

surrounding synthetic chemicals. As agriculture faces rising disease losses linked to environmental shifts, the demand for effective soil health management has never been more critical. A key driver is the increasing incidence of crop pests, with reports indicating that disease losses in major agricultural regions are on the rise, pushing farmers to seek robust protection for high-value crops. Concurrently, the market is responding to a pronounced shift toward sustainable crop protection. While the organophosphate segment, particularly products like fosthiazate, remains a cornerstone due to its established efficacy and cost-effectiveness, the industry is witnessing a surge in innovation. Major players are investing heavily in biological and next-generation chemical solutions that align with residue-free and organic farming trends. The competitive landscape is evolving as patent expirations on key ingredients, such as fluopyram, have enabled generic manufacturers to enter the market, increasing competition and driving down costs. However, this dynamic is also spurring innovation, as legacy products are being reformulated with advanced technologies like microencapsulation to enhance safety and efficacy, positioning them against newer, high-activity compounds like fluazaindolizine. A significant emerging trend is the integration of these agents into holistic crop management systems, moving beyond simple pest control to encompass root health and plant resilience. Furthermore, the market is adapting to global supply chain pressures, with tariffs influencing the cost of imported active ingredients and accelerating the development of regional manufacturing capabilities. This environment is fostering a multi-layered market where conventional products maintain the fundamental base while high-value bio-rational and next-generation chemistries capture premium segments, creating substantial opportunities for companies that can bridge the gap between cost, performance, and sustainability.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Nematicides 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 Nematicides portfolios and capabilities, market entry strategies, market positions, and geographic

footprints, to better understand these firms' unique position in an accelerating global Nematicides market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Nematicides 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 Nematicides.

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

Market Segmentation

Segmentation by Type:

Synthetic Chemical Nematicides

Microbial Nematicides

Botanical and Biochemical Nematicides

Segmentation by Formulation:

Liquid Formulations

Granular Formulations

Fumigant Formulations

Segmentation by Active Ingredient Concentration:

Low-concentration??10%?

Medium-concentration??10–30%?

High-concentration??30%?

Segmentation by Application:

Field Crops

Fruits and Vegetables

Plantation and Specialty Crops

Other

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.

Bayer AG

Syngenta AG

Corteva, Inc.

BASF SE

FMC Corporation

ADAMA Ltd.

UPL Limited

Certis Belchim B.V.

American Vanguard Corporation

Sumitomo Chemical Co., Ltd.

Ishihara Sangyo Kaisha, Ltd.

Agro-Kanesho Co., Ltd.

Lier Chemical Co., Ltd.

Nantong Jiangshan Agrochemical & Chemicals Co., Ltd.

Hebei Veyong Bio-Chemical Co., Ltd.

Shandong Weifang Rainbow Chemical Co., Ltd.

Hailir Pesticides and Chemicals Group Co., Ltd.

Key Questions Addressed in this Report

What is the 10-year outlook for the global Nematicides market?

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

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

How do Nematicides market opportunities vary by end market size?

How does Nematicides break out by Type, by Application?

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