

Global Neonicotinoid Insecticide Formulations Market Growth 2026-2032

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Abstracts

The global Neonicotinoid Insecticide Formulations market size is predicted to grow from US\$ 5380 million in 2025 to US\$ 7976 million in 2032; it is expected to grow at a CAGR of 5.8% from 2026 to 2032.

Neonicotinoid insecticide formulations are agricultural crop-protection products containing imidacloprid, thiamethoxam, acetamiprid, clothianidin, dinotefuran, nitenpyram or other registered neonicotinoid active ingredients. They are manufactured through dissolution, dispersion, milling, granulation, blending and packaging and are characterized by systemic movement, relatively low application rates, extended residual activity and strong control of sucking insect pests. Major formulation types include suspension concentrates, soluble concentrates, water-dispersible granules, wettable powders, soluble powders, flowable seed treatments and water-dispersible powders for seed treatment. Key upstream inputs include neonicotinoid technical materials, solvents, dispersants, wetting agents, emulsifiers, thickeners, antifreeze agents, defoamers, carriers, film-forming agents, colorants and packaging materials. Major downstream customers include seed-treatment companies, agricultural input distributors, crop-service organizations, large farms and individual growers, with applications covering seed treatment, foliar spraying and soil treatment in cereals, corn, oilseeds, cotton, rice, fruits and vegetables. On the basis of finished agricultural formulations and commercial formulation equivalents, effective global capacity in 2025 is estimated at approximately 925,000 metric tons, with sales of around 674,600 metric tons and a weighted average ex-works price of approximately USD 8,150 per metric ton. The industry's overall gross margin is estimated at approximately 24%-38%.

The global market will continue to be supported by insect-control demand in cereals, corn, rice, oilseeds, cotton and horticultural crops. Neonicotinoid formulations combine

systemic movement, flexible application methods and strong activity against sucking pests and can be applied as seed treatments, soil treatments or foliar sprays across different crop-development stages. Seed treatment remains a high-value application because it provides protection during germination and early growth and can reduce the need for early foliar applications, while foliar and soil formulations remain important in fruits, vegetables, rice, cotton and other crops exposed to high pest pressure.

The product mix will continue to shift from low-concentration wettable powders and conventional solvent-based products toward high-loading water-dispersible granules, suspension concentrates, flowable seed treatments and premixes containing multiple modes of action. Formulation development will focus on wetting and dispersion, seed adhesion, low-temperature stability, dust reduction and controlled active-ingredient release. As resistance to single-active products increases, rotation and combination with pyrethroids, diamides, avermectins, biological products and other insecticide groups will become more important.

Regulation and pollinator-protection requirements will continue to reshape regional demand. The European Union has banned all outdoor uses of imidacloprid, thiamethoxam and clothianidin, and their active-substance approvals have expired. Thiacloprid was not renewed, while acetamiprid remains approved in the European Union until 2033. The United States continues to permit multiple agricultural uses but has proposed risk-mitigation measures covering application timing, spray drift, protective equipment and selected use cancellations. European demand will therefore become more concentrated in acetamiprid and limited authorized applications, while the Americas and Asia will remain the principal markets for conventional neonicotinoid formulations.

Competition will involve originator brands, multinational generic companies and integrated Chinese and Indian manufacturers. As patents on the principal active ingredients have expired, price competition in generic imidacloprid, acetamiprid and thiamethoxam formulations will remain intense. Originator and large crop-protection groups will seek to maintain premiums through seed-treatment brands, global registrations, premix portfolios, resistance-management programs and crop-specific solutions. Chinese producers benefit from integrated intermediate, technical-material and formulation supply chains, but future competitiveness will increasingly depend on overseas registrations, formulation stability, impurity control, environmental data and local distribution rather than low export prices alone.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Neonicotinoid Insecticide Formulations 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 Neonicotinoid Insecticide Formulations portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Neonicotinoid Insecticide Formulations market.

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

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

Segmentation by Type:

Imidacloprid

Thiamethoxam

Acetamiprid

Clothianidin

Dinotefuran

Other

Segmentation by Product Composition:

Single-active Formulations

Premix Formulations

Segmentation by Physical Form:

Liquid Formulations

Granular Formulations

Powder Formulations

Other

Segmentation by Application:

Cereals and Grains

Oilseeds and Pulses

Fruits and Vegetables

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

Syngenta Group

Sumitomo Chemical

Nippon Soda

Mitsui Chemicals

Nufarm

UPL

Albaugh

Hailir Pesticides and Chemicals Group

Jiangsu Kesheng Group

Sino-Agri United Biotechnology

Key Questions Addressed in this Report

What is the 10-year outlook for the global Neonicotinoid Insecticide Formulations market?

What factors are driving Neonicotinoid Insecticide Formulations market growth, globally and by region?

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

How do Neonicotinoid Insecticide Formulations market opportunities vary by end market size?

How does Neonicotinoid Insecticide Formulations break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Neonicotinoid Insecticide Formulations Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Neonicotinoid Insecticide Formulations by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Neonicotinoid Insecticide Formulations by Country/Region, 2021, 2025 & 2032

2.2 Neonicotinoid Insecticide Formulations Segment by Type

- 2.2.1 Imidacloprid
- 2.2.2 Thiamethoxam
- 2.2.3 Acetamiprid
- 2.2.4 Clothianidin
- 2.2.5 Dinotefuran
- 2.2.6 Other
- 2.2.7 Neonicotinoid Insecticide Formulations Sales by Type
 - 2.2.7.1 Global Neonicotinoid Insecticide Formulations Sales Market Share by Type (2021-2026)
 - 2.2.7.2 Global Neonicotinoid Insecticide Formulations Revenue and Market Share by Type (2021-2026)
 - 2.2.7.3 Global Neonicotinoid Insecticide Formulations Sale Price by Type (2021-2026)

2.3 Neonicotinoid Insecticide Formulations Segment by Product Composition

- 2.3.1 Single-active Formulations
- 2.3.2 Premix Formulations
- 2.3.3 Neonicotinoid Insecticide Formulations Sales by Product Composition

2.3.3.1 Global Neonicotinoid Insecticide Formulations Sales Market Share by Product Composition (2021-2026)

2.3.3.2 Global Neonicotinoid Insecticide Formulations Revenue and Market Share by Product Composition (2021-2026)

2.3.3.3 Global Neonicotinoid Insecticide Formulations Sale Price by Product Composition (2021-2026)

2.4 Neonicotinoid Insecticide Formulations Segment by Physical Form

2.4.1 Liquid Formulations

2.4.2 Granular Formulations

2.4.3 Powder Formulations

2.4.4 Other

2.4.5 Neonicotinoid Insecticide Formulations Sales by Physical Form

2.4.5.1 Global Neonicotinoid Insecticide Formulations Sales Market Share by Physical Form (2021-2026)

2.4.5.2 Global Neonicotinoid Insecticide Formulations Revenue and Market Share by Physical Form (2021-2026)

2.4.5.3 Global Neonicotinoid Insecticide Formulations Sale Price by Physical Form (2021-2026)

2.5 Neonicotinoid Insecticide Formulations Segment by Application

2.5.1 Cereals and Grains

2.5.2 Oilseeds and Pulses

2.5.3 Fruits and Vegetables

2.5.4 Other

2.5.5 Neonicotinoid Insecticide Formulations Sales by Application

2.5.5.1 Global Neonicotinoid Insecticide Formulations Sale Market Share by Application (2021-2026)

2.5.5.2 Global Neonicotinoid Insecticide Formulations Revenue and Market Share by Application (2021-2026)

2.5.5.3 Global Neonicotinoid Insecticide Formulations Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Neonicotinoid Insecticide Formulations Breakdown Data by Company

3.1.1 Global Neonicotinoid Insecticide Formulations Annual Sales by Company (2021-2026)

3.1.2 Global Neonicotinoid Insecticide Formulations Sales Market Share by Company (2021-2026)

3.2 Global Neonicotinoid Insecticide Formulations Annual Revenue by Company

(2021-2026)

3.2.1 Global Neonicotinoid Insecticide Formulations Revenue by Company

(2021-2026)

3.2.2 Global Neonicotinoid Insecticide Formulations Revenue Market Share by Company (2021-2026)

3.3 Global Neonicotinoid Insecticide Formulations Sale Price by Company

3.4 Key Manufacturers Neonicotinoid Insecticide Formulations Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Neonicotinoid Insecticide Formulations Product Location Distribution

3.4.2 Players Neonicotinoid Insecticide Formulations Products Offered

3.5 Market Concentration Rate Analysis

3.5.1 Competition Landscape Analysis

3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

3.6 New Products and Potential Entrants

3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR NEONICOTINOID INSECTICIDE FORMULATIONS BY GEOGRAPHIC REGION

4.1 World Historic Neonicotinoid Insecticide Formulations Market Size by Geographic Region (2021-2026)

4.1.1 Global Neonicotinoid Insecticide Formulations Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Neonicotinoid Insecticide Formulations Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Neonicotinoid Insecticide Formulations Market Size by Country/Region (2021-2026)

4.2.1 Global Neonicotinoid Insecticide Formulations Annual Sales by Country/Region (2021-2026)

4.2.2 Global Neonicotinoid Insecticide Formulations Annual Revenue by Country/Region (2021-2026)

4.3 Americas Neonicotinoid Insecticide Formulations Sales Growth

4.4 APAC Neonicotinoid Insecticide Formulations Sales Growth

4.5 Europe Neonicotinoid Insecticide Formulations Sales Growth

4.6 Middle East & Africa Neonicotinoid Insecticide Formulations Sales Growth

5 AMERICAS

5.1 Americas Neonicotinoid Insecticide Formulations Sales by Country

5.1.1 Americas Neonicotinoid Insecticide Formulations Sales by Country (2021-2026)

5.1.2 Americas Neonicotinoid Insecticide Formulations Revenue by Country
(2021-2026)

5.2 Americas Neonicotinoid Insecticide Formulations Sales by Type (2021-2026)

5.3 Americas Neonicotinoid Insecticide Formulations Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Neonicotinoid Insecticide Formulations Sales by Region

6.1.1 APAC Neonicotinoid Insecticide Formulations Sales by Region (2021-2026)

6.1.2 APAC Neonicotinoid Insecticide Formulations Revenue by Region (2021-2026)

6.2 APAC Neonicotinoid Insecticide Formulations Sales by Type (2021-2026)

6.3 APAC Neonicotinoid Insecticide Formulations Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Neonicotinoid Insecticide Formulations by Country

7.1.1 Europe Neonicotinoid Insecticide Formulations Sales by Country (2021-2026)

7.1.2 Europe Neonicotinoid Insecticide Formulations Revenue by Country (2021-2026)

7.2 Europe Neonicotinoid Insecticide Formulations Sales by Type (2021-2026)

7.3 Europe Neonicotinoid Insecticide Formulations Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Neonicotinoid Insecticide Formulations by Country

8.1.1 Middle East & Africa Neonicotinoid Insecticide Formulations Sales by Country (2021-2026)

8.1.2 Middle East & Africa Neonicotinoid Insecticide Formulations Revenue by Country (2021-2026)

8.2 Middle East & Africa Neonicotinoid Insecticide Formulations Sales by Type (2021-2026)

8.3 Middle East & Africa Neonicotinoid Insecticide Formulations Sales by Application (2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Neonicotinoid Insecticide Formulations

10.3 Manufacturing Process Analysis of Neonicotinoid Insecticide Formulations

10.4 Industry Chain Structure of Neonicotinoid Insecticide Formulations

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Neonicotinoid Insecticide Formulations Distributors

11.3 Neonicotinoid Insecticide Formulations Customer

12 WORLD FORECAST REVIEW FOR NEONICOTINOID INSECTICIDE

FORMULATIONS BY GEOGRAPHIC REGION

12.1 Global Neonicotinoid Insecticide Formulations Market Size Forecast by Region

12.1.1 Global Neonicotinoid Insecticide Formulations Forecast by Region (2027-2032)

12.1.2 Global Neonicotinoid Insecticide Formulations Annual Revenue Forecast by Region (2027-2032)

12.2 Americas Forecast by Country (2027-2032)

12.3 APAC Forecast by Region (2027-2032)

12.4 Europe Forecast by Country (2027-2032)

12.5 Middle East & Africa Forecast by Country (2027-2032)

12.6 Global Neonicotinoid Insecticide Formulations Forecast by Type (2027-2032)

12.7 Global Neonicotinoid Insecticide Formulations Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Bayer

13.1.1 Bayer Company Information

13.1.2 Bayer Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.1.3 Bayer Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Bayer Main Business Overview

13.1.5 Bayer Latest Developments

13.2 Syngenta Group

13.2.1 Syngenta Group Company Information

13.2.2 Syngenta Group Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.2.3 Syngenta Group Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Syngenta Group Main Business Overview

13.2.5 Syngenta Group Latest Developments

13.3 Sumitomo Chemical

13.3.1 Sumitomo Chemical Company Information

13.3.2 Sumitomo Chemical Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.3.3 Sumitomo Chemical Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.3.4 Sumitomo Chemical Main Business Overview

13.3.5 Sumitomo Chemical Latest Developments

13.4 Nippon Soda

13.4.1 Nippon Soda Company Information

13.4.2 Nippon Soda Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.4.3 Nippon Soda Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.4.4 Nippon Soda Main Business Overview

13.4.5 Nippon Soda Latest Developments

13.5 Mitsui Chemicals

13.5.1 Mitsui Chemicals Company Information

13.5.2 Mitsui Chemicals Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.5.3 Mitsui Chemicals Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.5.4 Mitsui Chemicals Main Business Overview

13.5.5 Mitsui Chemicals Latest Developments

13.6 Nufarm

13.6.1 Nufarm Company Information

13.6.2 Nufarm Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.6.3 Nufarm Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.6.4 Nufarm Main Business Overview

13.6.5 Nufarm Latest Developments

13.7 UPL

13.7.1 UPL Company Information

13.7.2 UPL Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.7.3 UPL Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.7.4 UPL Main Business Overview

13.7.5 UPL Latest Developments

13.8 Albaugh

13.8.1 Albaugh Company Information

13.8.2 Albaugh Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

13.8.3 Albaugh Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)

13.8.4 Albaugh Main Business Overview

- 13.8.5 Albaugh Latest Developments
- 13.9 Hailir Pesticides and Chemicals Group
 - 13.9.1 Hailir Pesticides and Chemicals Group Company Information
 - 13.9.2 Hailir Pesticides and Chemicals Group Neonicotinoid Insecticide Formulations Product Portfolios and Specifications
 - 13.9.3 Hailir Pesticides and Chemicals Group Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Hailir Pesticides and Chemicals Group Main Business Overview
 - 13.9.5 Hailir Pesticides and Chemicals Group Latest Developments
- 13.10 Jiangsu Kesheng Group
 - 13.10.1 Jiangsu Kesheng Group Company Information
 - 13.10.2 Jiangsu Kesheng Group Neonicotinoid Insecticide Formulations Product Portfolios and Specifications
 - 13.10.3 Jiangsu Kesheng Group Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Jiangsu Kesheng Group Main Business Overview
 - 13.10.5 Jiangsu Kesheng Group Latest Developments
- 13.11 Sino-Agri United Biotechnology
 - 13.11.1 Sino-Agri United Biotechnology Company Information
 - 13.11.2 Sino-Agri United Biotechnology Neonicotinoid Insecticide Formulations Product Portfolios and Specifications
 - 13.11.3 Sino-Agri United Biotechnology Neonicotinoid Insecticide Formulations Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Sino-Agri United Biotechnology Main Business Overview
 - 13.11.5 Sino-Agri United Biotechnology Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Neonicotinoid Insecticide Formulations Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Neonicotinoid Insecticide Formulations Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Imidacloprid

Table 4. Major Players of Thiamethoxam

Table 5. Major Players of Acetamiprid

Table 6. Major Players of Clothianidin

Table 7. Major Players of Dinotefuran

Table 8. Major Players of Other

Table 9. Global Neonicotinoid Insecticide Formulations Sales by Type (2021-2026) & (Tons)

Table 10. Global Neonicotinoid Insecticide Formulations Sales Market Share by Type (2021-2026)

Table 11. Global Neonicotinoid Insecticide Formulations Revenue by Type (2021-2026) & (\$ million)

Table 12. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Type (2021-2026)

Table 13. Global Neonicotinoid Insecticide Formulations Sale Price by Type (2021-2026) & (US\$/Ton)

Table 14. Major Players of Single-active Formulations

Table 15. Major Players of Premix Formulations

Table 16. Global Neonicotinoid Insecticide Formulations Sales by Product Composition (2021-2026) & (Tons)

Table 17. Global Neonicotinoid Insecticide Formulations Sales Market Share by Product Composition (2021-2026)

Table 18. Global Neonicotinoid Insecticide Formulations Revenue by Product Composition (2021-2026) & (\$ million)

Table 19. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Product Composition (2021-2026)

Table 20. Global Neonicotinoid Insecticide Formulations Sale Price by Product Composition (2021-2026) & (US\$/Ton)

Table 21. Major Players of Liquid Formulations

Table 22. Major Players of Granular Formulations

Table 23. Major Players of Powder Formulations

Table 24. Major Players of Other

Table 25. Global Neonicotinoid Insecticide Formulations Sales by Physical Form (2021-2026) & (Tons)

Table 26. Global Neonicotinoid Insecticide Formulations Sales Market Share by Physical Form (2021-2026)

Table 27. Global Neonicotinoid Insecticide Formulations Revenue by Physical Form (2021-2026) & (\$ million)

Table 28. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Physical Form (2021-2026)

Table 29. Global Neonicotinoid Insecticide Formulations Sale Price by Physical Form (2021-2026) & (US\$/Ton)

Table 30. Global Neonicotinoid Insecticide Formulations Sale by Application (2021-2026) & (Tons)

Table 31. Global Neonicotinoid Insecticide Formulations Sale Market Share by Application (2021-2026)

Table 32. Global Neonicotinoid Insecticide Formulations Revenue by Application (2021-2026) & (\$ million)

Table 33. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Application (2021-2026)

Table 34. Global Neonicotinoid Insecticide Formulations Sale Price by Application (2021-2026) & (US\$/Ton)

Table 35. Global Neonicotinoid Insecticide Formulations Sales by Company (2021-2026) & (Tons)

Table 36. Global Neonicotinoid Insecticide Formulations Sales Market Share by Company (2021-2026)

Table 37. Global Neonicotinoid Insecticide Formulations Revenue by Company (2021-2026) & (\$ millions)

Table 38. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Company (2021-2026)

Table 39. Global Neonicotinoid Insecticide Formulations Sale Price by Company (2021-2026) & (US\$/Ton)

Table 40. Key Manufacturers Neonicotinoid Insecticide Formulations Producing Area Distribution and Sales Area

Table 41. Players Neonicotinoid Insecticide Formulations Products Offered

Table 42. Neonicotinoid Insecticide Formulations Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 43. New Products and Potential Entrants

Table 44. Market M&A Activity & Strategy

Table 45. Global Neonicotinoid Insecticide Formulations Sales by Geographic Region

(2021-2026) & (Tons)

Table 46. Global Neonicotinoid Insecticide Formulations Sales Market Share
Geographic Region (2021-2026)

Table 47. Global Neonicotinoid Insecticide Formulations Revenue by Geographic
Region (2021-2026) & (\$ millions)

Table 48. Global Neonicotinoid Insecticide Formulations Revenue Market Share by
Geographic Region (2021-2026)

Table 49. Global Neonicotinoid Insecticide Formulations Sales by Country/Region
(2021-2026) & (Tons)

Table 50. Global Neonicotinoid Insecticide Formulations Sales Market Share by
Country/Region (2021-2026)

Table 51. Global Neonicotinoid Insecticide Formulations Revenue by Country/Region
(2021-2026) & (\$ millions)

Table 52. Global Neonicotinoid Insecticide Formulations Revenue Market Share by
Country/Region (2021-2026)

Table 53. Americas Neonicotinoid Insecticide Formulations Sales by Country
(2021-2026) & (Tons)

Table 54. Americas Neonicotinoid Insecticide Formulations Sales Market Share by
Country (2021-2026)

Table 55. Americas Neonicotinoid Insecticide Formulations Revenue by Country
(2021-2026) & (\$ millions)

Table 56. Americas Neonicotinoid Insecticide Formulations Sales by Type (2021-2026)
& (Tons)

Table 57. Americas Neonicotinoid Insecticide Formulations Sales by Application
(2021-2026) & (Tons)

Table 58. APAC Neonicotinoid Insecticide Formulations Sales by Region (2021-2026) &
(Tons)

Table 59. APAC Neonicotinoid Insecticide Formulations Sales Market Share by Region
(2021-2026)

Table 60. APAC Neonicotinoid Insecticide Formulations Revenue by Region
(2021-2026) & (\$ millions)

Table 61. APAC Neonicotinoid Insecticide Formulations Sales by Type (2021-2026) &
(Tons)

Table 62. APAC Neonicotinoid Insecticide Formulations Sales by Application
(2021-2026) & (Tons)

Table 63. Europe Neonicotinoid Insecticide Formulations Sales by Country (2021-2026)
& (Tons)

Table 64. Europe Neonicotinoid Insecticide Formulations Revenue by Country
(2021-2026) & (\$ millions)

Table 65. Europe Neonicotinoid Insecticide Formulations Sales by Type (2021-2026) & (Tons)

Table 66. Europe Neonicotinoid Insecticide Formulations Sales by Application (2021-2026) & (Tons)

Table 67. Middle East & Africa Neonicotinoid Insecticide Formulations Sales by Country (2021-2026) & (Tons)

Table 68. Middle East & Africa Neonicotinoid Insecticide Formulations Revenue Market Share by Country (2021-2026)

Table 69. Middle East & Africa Neonicotinoid Insecticide Formulations Sales by Type (2021-2026) & (Tons)

Table 70. Middle East & Africa Neonicotinoid Insecticide Formulations Sales by Application (2021-2026) & (Tons)

Table 71. Key Market Drivers & Growth Opportunities of Neonicotinoid Insecticide Formulations

Table 72. Key Market Challenges & Risks of Neonicotinoid Insecticide Formulations

Table 73. Key Industry Trends of Neonicotinoid Insecticide Formulations

Table 74. Neonicotinoid Insecticide Formulations Raw Material

Table 75. Key Suppliers of Raw Materials

Table 76. Neonicotinoid Insecticide Formulations Distributors List

Table 77. Neonicotinoid Insecticide Formulations Customer List

Table 78. Global Neonicotinoid Insecticide Formulations Sales Forecast by Region (2027-2032) & (Tons)

Table 79. Global Neonicotinoid Insecticide Formulations Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 80. Americas Neonicotinoid Insecticide Formulations Sales Forecast by Country (2027-2032) & (Tons)

Table 81. Americas Neonicotinoid Insecticide Formulations Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 82. APAC Neonicotinoid Insecticide Formulations Sales Forecast by Region (2027-2032) & (Tons)

Table 83. APAC Neonicotinoid Insecticide Formulations Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 84. Europe Neonicotinoid Insecticide Formulations Sales Forecast by Country (2027-2032) & (Tons)

Table 85. Europe Neonicotinoid Insecticide Formulations Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 86. Middle East & Africa Neonicotinoid Insecticide Formulations Sales Forecast by Country (2027-2032) & (Tons)

Table 87. Middle East & Africa Neonicotinoid Insecticide Formulations Revenue

Forecast by Country (2027-2032) & (\$ millions)

Table 88. Global Neonicotinoid Insecticide Formulations Sales Forecast by Type (2027-2032) & (Tons)

Table 89. Global Neonicotinoid Insecticide Formulations Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 90. Global Neonicotinoid Insecticide Formulations Sales Forecast by Application (2027-2032) & (Tons)

Table 91. Global Neonicotinoid Insecticide Formulations Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 92. Bayer Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 93. Bayer Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 94. Bayer Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 95. Bayer Main Business

Table 96. Bayer Latest Developments

Table 97. Syngenta Group Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 98. Syngenta Group Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 99. Syngenta Group Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 100. Syngenta Group Main Business

Table 101. Syngenta Group Latest Developments

Table 102. Sumitomo Chemical Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 103. Sumitomo Chemical Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 104. Sumitomo Chemical Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 105. Sumitomo Chemical Main Business

Table 106. Sumitomo Chemical Latest Developments

Table 107. Nippon Soda Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 108. Nippon Soda Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 109. Nippon Soda Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 110. Nippon Soda Main Business

Table 111. Nippon Soda Latest Developments

Table 112. Mitsui Chemicals Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 113. Mitsui Chemicals Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 114. Mitsui Chemicals Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 115. Mitsui Chemicals Main Business

Table 116. Mitsui Chemicals Latest Developments

Table 117. Nufarm Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 118. Nufarm Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 119. Nufarm Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 120. Nufarm Main Business

Table 121. Nufarm Latest Developments

Table 122. UPL Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 123. UPL Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 124. UPL Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 125. UPL Main Business

Table 126. UPL Latest Developments

Table 127. Albaugh Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 128. Albaugh Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 129. Albaugh Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 130. Albaugh Main Business

Table 131. Albaugh Latest Developments

Table 132. Hailir Pesticides and Chemicals Group Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 133. Hailir Pesticides and Chemicals Group Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 134. Hailir Pesticides and Chemicals Group Neonicotinoid Insecticide

Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 135. Hailir Pesticides and Chemicals Group Main Business

Table 136. Hailir Pesticides and Chemicals Group Latest Developments

Table 137. Jiangsu Kesheng Group Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 138. Jiangsu Kesheng Group Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 139. Jiangsu Kesheng Group Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 140. Jiangsu Kesheng Group Main Business

Table 141. Jiangsu Kesheng Group Latest Developments

Table 142. Sino-Agri United Biotechnology Basic Information, Neonicotinoid Insecticide Formulations Manufacturing Base, Sales Area and Its Competitors

Table 143. Sino-Agri United Biotechnology Neonicotinoid Insecticide Formulations Product Portfolios and Specifications

Table 144. Sino-Agri United Biotechnology Neonicotinoid Insecticide Formulations Sales (Tons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 145. Sino-Agri United Biotechnology Main Business

Table 146. Sino-Agri United Biotechnology Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Neonicotinoid Insecticide Formulations
- Figure 2. Neonicotinoid Insecticide Formulations Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Neonicotinoid Insecticide Formulations Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Neonicotinoid Insecticide Formulations Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Neonicotinoid Insecticide Formulations Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Neonicotinoid Insecticide Formulations Sales Market Share by Country/Region (2025)
- Figure 10. Neonicotinoid Insecticide Formulations Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Imidacloprid
- Figure 12. Product Picture of Thiamethoxam
- Figure 13. Product Picture of Acetamiprid
- Figure 14. Product Picture of Clothianidin
- Figure 15. Product Picture of Dinotefuran
- Figure 16. Product Picture of Other
- Figure 17. Global Neonicotinoid Insecticide Formulations Sales Market Share by Type in 2026
- Figure 18. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Type (2021-2026)
- Figure 19. Product Picture of Single-active Formulations
- Figure 20. Product Picture of Premix Formulations
- Figure 21. Global Neonicotinoid Insecticide Formulations Sales Market Share by Product Composition in 2026
- Figure 22. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Product Composition (2021-2026)
- Figure 23. Product Picture of Liquid Formulations
- Figure 24. Product Picture of Granular Formulations
- Figure 25. Product Picture of Powder Formulations
- Figure 26. Product Picture of Other

Figure 27. Global Neonicotinoid Insecticide Formulations Sales Market Share by Physical Form in 2026

Figure 28. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Physical Form (2021-2026)

Figure 29. Neonicotinoid Insecticide Formulations Consumed in Cereals and Grains

Figure 30. Global Neonicotinoid Insecticide Formulations Market: Cereals and Grains (2021-2026) & (Tons)

Figure 31. Neonicotinoid Insecticide Formulations Consumed in Oilseeds and Pulses

Figure 32. Global Neonicotinoid Insecticide Formulations Market: Oilseeds and Pulses (2021-2026) & (Tons)

Figure 33. Neonicotinoid Insecticide Formulations Consumed in Fruits and Vegetables

Figure 34. Global Neonicotinoid Insecticide Formulations Market: Fruits and Vegetables (2021-2026) & (Tons)

Figure 35. Neonicotinoid Insecticide Formulations Consumed in Other

Figure 36. Global Neonicotinoid Insecticide Formulations Market: Other (2021-2026) & (Tons)

Figure 37. Global Neonicotinoid Insecticide Formulations Sale Market Share by Application (2025)

Figure 38. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Application in 2025

Figure 39. Neonicotinoid Insecticide Formulations Sales by Company in 2025 (Tons)

Figure 40. Global Neonicotinoid Insecticide Formulations Sales Market Share by Company in 2025

Figure 41. Neonicotinoid Insecticide Formulations Revenue by Company in 2025 (\$ millions)

Figure 42. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Company in 2025

Figure 43. Global Neonicotinoid Insecticide Formulations Sales Market Share by Geographic Region (2021-2026)

Figure 44. Global Neonicotinoid Insecticide Formulations Revenue Market Share by Geographic Region in 2025

Figure 45. Americas Neonicotinoid Insecticide Formulations Sales 2021-2026 (Tons)

Figure 46. Americas Neonicotinoid Insecticide Formulations Revenue 2021-2026 (\$ millions)

Figure 47. APAC Neonicotinoid Insecticide Formulations Sales 2021-2026 (Tons)

Figure 48. APAC Neonicotinoid Insecticide Formulations Revenue 2021-2026 (\$ millions)

Figure 49. Europe Neonicotinoid Insecticide Formulations Sales 2021-2026 (Tons)

Figure 50. Europe Neonicotinoid Insecticide Formulations Revenue 2021-2026 (\$

millions)

Figure 51. Middle East & Africa Neonicotinoid Insecticide Formulations Sales
2021-2026 (Tons)

Figure 52. Middle East & Africa Neonicotinoid Insecticide Formulations Revenue
2021-2026 (\$ millions)

Figure 53. Americas Neonicotinoid Insecticide Formulations Sales Market Share by
Country in 2025

Figure 54. Americas Neonicotinoid Insecticide Formulations Revenue Market Share by
Country (2021-2026)

Figure 55. Americas Neonicotinoid Insecticide Formulations Sales Market Share by
Type (2021-2026)

Figure 56. Americas Neonicotinoid Insecticide Formulations Sales Market Share by
Application (2021-2026)

Figure 57. United States Neonicotinoid Insecticide Formulations Revenue Growth
2021-2026 (\$ millions)

Figure 58. Canada Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026
(\$ millions)

Figure 59. Mexico Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026
(\$ millions)

Figure 60. Brazil Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$
millions)

Figure 61. APAC Neonicotinoid Insecticide Formulations Sales Market Share by Region
in 2025

Figure 62. APAC Neonicotinoid Insecticide Formulations Revenue Market Share by
Region (2021-2026)

Figure 63. APAC Neonicotinoid Insecticide Formulations Sales Market Share by Type
(2021-2026)

Figure 64. APAC Neonicotinoid Insecticide Formulations Sales Market Share by
Application (2021-2026)

Figure 65. China Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$
millions)

Figure 66. Japan Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$
millions)

Figure 67. South Korea Neonicotinoid Insecticide Formulations Revenue Growth
2021-2026 (\$ millions)

Figure 68. Southeast Asia Neonicotinoid Insecticide Formulations Revenue Growth
2021-2026 (\$ millions)

Figure 69. India Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$
millions)

Figure 70. Australia Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 71. China Taiwan Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 72. Europe Neonicotinoid Insecticide Formulations Sales Market Share by Country in 2025

Figure 73. Europe Neonicotinoid Insecticide Formulations Revenue Market Share by Country (2021-2026)

Figure 74. Europe Neonicotinoid Insecticide Formulations Sales Market Share by Type (2021-2026)

Figure 75. Europe Neonicotinoid Insecticide Formulations Sales Market Share by Application (2021-2026)

Figure 76. Germany Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 77. France Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 78. UK Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 79. Italy Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 80. Russia Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 81. Middle East & Africa Neonicotinoid Insecticide Formulations Sales Market Share by Country (2021-2026)

Figure 82. Middle East & Africa Neonicotinoid Insecticide Formulations Sales Market Share by Type (2021-2026)

Figure 83. Middle East & Africa Neonicotinoid Insecticide Formulations Sales Market Share by Application (2021-2026)

Figure 84. Egypt Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 85. South Africa Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 86. Israel Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 87. Turkey Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 88. GCC Countries Neonicotinoid Insecticide Formulations Revenue Growth 2021-2026 (\$ millions)

Figure 89. Manufacturing Cost Structure Analysis of Neonicotinoid Insecticide

Formulations in 2026

Figure 90. Manufacturing Process Analysis of Neonicotinoid Insecticide Formulations

Figure 91. Industry Chain Structure of Neonicotinoid Insecticide Formulations

Figure 92. Channels of Distribution

Figure 93. Global Neonicotinoid Insecticide Formulations Sales Market Forecast by Region (2027-2032)

Figure 94. Global Neonicotinoid Insecticide Formulations Revenue Market Share Forecast by Region (2027-2032)

Figure 95. Global Neonicotinoid Insecticide Formulations Sales Market Share Forecast by Type (2027-2032)

Figure 96. Global Neonicotinoid Insecticide Formulations Revenue Market Share Forecast by Type (2027-2032)

Figure 97. Global Neonicotinoid Insecticide Formulations Sales Market Share Forecast by Application (2027-2032)

Figure 98. Global Neonicotinoid Insecticide Formulations Revenue Market Share Forecast by Application (2027-2032)

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