

Global Pesticide Active Ingredients Market Growth 2026-2032

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Abstracts

The global Pesticide Active Ingredients market size is predicted to grow from US\$ 69027 million in 2025 to US\$ 84731 million in 2032; it is expected to grow at a CAGR of 3.0% from 2026 to 2032.

Pesticide Active Ingredients are the biologically active chemical or biological substances (identified by active ingredient name and typically a CAS number) that deliver pest control performance in agricultural crop protection. They are supplied either as technical materials for downstream formulation, or embedded within branded or generic formulated products sold through distributor and retailer channels to growers. Upstream supply is anchored by petrochemical and inorganic feedstocks, key intermediates (e.g., chlorinated, phosphonated, nitrile, fluorinated and heterocycle building blocks), solvents, catalysts, and EHS-critical utilities and waste treatment capacity. Downstream demand is driven by crop protection programs across major crop groups, with product choice shaped by local pest pressure, resistance management, regulatory approvals, and agronomic practice (seed treatment, foliar, soil, and post-harvest). Procurement often combines multi-year sourcing for high-volume, off-patent actives (to secure reliability and manage cost) with annual programs and distributor agreements for formulated products; innovators additionally use portfolio bundling and stewardship requirements, while large generics rely on scale manufacturing and broad registration coverage.

In the current market, global production is around 3.8 million metric tons (active ingredient basis), with an average selling price of about 18,600 USD per metric ton EXW basis. Market concentration is meaningful: the top suppliers (innovator and large generic groups) together account for an estimated CR5 of ~58% of global revenue, reflecting scale advantages in R&D pipelines, global regulatory dossiers, and multi-site manufacturing footprints. Industry typical gross margin at the manufacturer level is

around 35%, supported by differentiated product mix, formulation know-how, and value-based pricing for proprietary modes of action; however, margins compress cyclically when channel inventories are high, when commodity herbicide pricing falls, or when regulatory actions remove high-margin use cases. Key barriers to entry include (1) time- and cost-intensive regulatory registration and data packages, (2) EHS permitting and continuous compliance for complex synthesis routes and waste streams, (3) process IP, impurity control, and reproducibility for difficult molecules, and (4) global distribution access and product stewardship capabilities that become mandatory in many markets.

Looking to 2026–2032, demand is expected to trend with planted area, yield intensity, and the pace of product substitution driven by resistance and regulation, producing a generally modest volume growth outlook but potentially stronger value growth if specialty and lower-dose actives expand. The most important supply constraints will likely remain regulatory (re-registrations, stricter residue limits, and local hazard classifications), manufacturing EHS capacity (especially for chlorinated, phosphorus and fluorinated chemistries), and intermediate supply tightness during plant outages or regional policy campaigns. Technology and portfolio shifts will continue: more selective chemistries, new seed treatment and biological/microbial solutions where economics and efficacy fit, and increased data-driven product positioning (digital agronomy) to protect performance under resistance pressure. Competitive dynamics should stay intense in off-patent actives, where Chinese and Indian supply depth drives price competition, while innovators defend premium segments through new modes of action, integrated offers, and stewardship requirements. Overall, the category remains scale- and compliance-driven, with winners characterized by broad registrations, resilient manufacturing, disciplined portfolio management, and strong channel execution.

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

This Insight Report provides a comprehensive analysis of the global Pesticide Active Ingredients 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

Pesticide Active Ingredients portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Pesticide Active Ingredients market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Pesticide Active Ingredients and breaks down the forecast by Pesticide 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 Pesticide Active Ingredients.

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

Segmentation by Pesticide Type:

Herbicide Active Ingredient

Insecticide Active Ingredient

Fungicide and Bactericide Active Ingredient

Plant Growth Regulator Active Ingredient

Other Pesticide Active Ingredient

Segmentation by Origin:

Conventional Synthetic Active Ingredient

Biochemical Active Ingredient

Microbial Active Ingredient

Inorganic Mineral Active Ingredient

Segmentation by Active Substance Form:

Acid or Neutral Active Substance

Salt Active Substance

Ester Active Substance

Other Derivative Active Substance

Segmentation by Phase-Out Status:

Stockholm Listed Active Ingredient

Banned or Cancelled in Major Jurisdictions

Phase Out Underway with Existing Stocks

Restricted or Substitution Candidate

Approved or Registered Active Ingredient

Segmentation by Application:

Field Crops

Horticulture Crops

Seed Treatment

Turf and Ornamentals

Public Health Vector Control

Structural and Household Pest Control

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.

Syngenta Group

Bayer

BASF

Corteva

FMC

UPL

ADAMA

Albaugh

Sipcam Oxon

Nufarm

Sumitomo Chemical

Nissan Chemical

Ishihara Sangyo Kaisha

Kumiai Chemical Industry

Nippon Soda

Zhejiang Xin'an Chemical Group

Hubei Xingfa Group

Jiangsu Yangnong Chemical

Lier Chemical

Gharda Chemicals

Key Questions Addressed in this Report

What is the 10-year outlook for the global Pesticide Active Ingredients market?

What factors are driving Pesticide Active Ingredients market growth, globally and by region?

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

How do Pesticide Active Ingredients market opportunities vary by end market size?

How does Pesticide Active Ingredients break out by Pesticide 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 Pesticide Active Ingredients Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Pesticide Active Ingredients by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Pesticide Active Ingredients by Country/Region, 2021, 2025 & 2032

2.2 Pesticide Active Ingredients Segment by Pesticide Type

- 2.2.1 Herbicide Active Ingredient
- 2.2.2 Insecticide Active Ingredient
- 2.2.3 Fungicide and Bactericide Active Ingredient
- 2.2.4 Plant Growth Regulator Active Ingredient
- 2.2.5 Other Pesticide Active Ingredient
- 2.2.6 Pesticide Active Ingredients Sales by Pesticide Type
 - 2.2.6.1 Global Pesticide Active Ingredients Sales Market Share by Pesticide Type (2021-2026)
 - 2.2.6.2 Global Pesticide Active Ingredients Revenue and Market Share by Pesticide Type (2021-2026)
 - 2.2.6.3 Global Pesticide Active Ingredients Sale Price by Pesticide Type (2021-2026)

- 2.3.5.1 Global Pesticide Active Ingredients Sales Market Share by Origin (2021-2026)
- 2.3.5.2 Global Pesticide Active Ingredients Revenue and Market Share by Origin (2021-2026)
- 2.3.5.3 Global Pesticide Active Ingredients Sale Price by Origin (2021-2026)
- 2.4 Pesticide Active Ingredients Segment by Active Substance Form
 - 2.4.1 Acid or Neutral Active Substance
 - 2.4.2 Salt Active Substance
 - 2.4.3 Ester Active Substance
 - 2.4.4 Other Derivative Active Substance
 - 2.4.5 Pesticide Active Ingredients Sales by Active Substance Form
 - 2.4.5.1 Global Pesticide Active Ingredients Sales Market Share by Active Substance Form (2021-2026)
 - 2.4.5.2 Global Pesticide Active Ingredients Revenue and Market Share by Active Substance Form (2021-2026)
 - 2.4.5.3 Global Pesticide Active Ingredients Sale Price by Active Substance Form (2021-2026)
- 2.5 Pesticide Active Ingredients Segment by Phase-Out Status
 - 2.5.1 Stockholm Listed Active Ingredient
 - 2.5.2 Banned or Cancelled in Major Jurisdictions
 - 2.5.3 Phase Out Underway with Existing Stocks
 - 2.5.4 Restricted or Substitution Candidate
 - 2.5.5 Approved or Registered Active Ingredient
 - 2.5.6 Pesticide Active Ingredients Sales by Phase-Out Status
 - 2.5.6.1 Global Pesticide Active Ingredients Sales Market Share by Phase-Out Status (2021-2026)
 - 2.5.6.2 Global Pesticide Active Ingredients Revenue and Market Share by Phase-Out Status (2021-2026)
 - 2.5.6.3 Global Pesticide Active Ingredients Sale Price by Phase-Out Status (2021-2026)
- 2.6 Pesticide Active Ingredients Segment by Application
 - 2.6.1 Field Crops
 - 2.6.2 Horticulture Crops
 - 2.6.3 Seed Treatment
 - 2.6.4 Turf and Ornamentals
 - 2.6.5 Public Health Vector Control
 - 2.6.6 Structural and Household Pest Control
 - 2.6.7 Pesticide Active Ingredients Sales by Application
 - 2.6.7.1 Global Pesticide Active Ingredients Sale Market Share by Application (2021-2026)

2.6.7.2 Global Pesticide Active Ingredients Revenue and Market Share by Application (2021-2026)

2.6.7.3 Global Pesticide Active Ingredients Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Pesticide Active Ingredients Breakdown Data by Company

3.1.1 Global Pesticide Active Ingredients Annual Sales by Company (2021-2026)

3.1.2 Global Pesticide Active Ingredients Sales Market Share by Company (2021-2026)

3.2 Global Pesticide Active Ingredients Annual Revenue by Company (2021-2026)

3.2.1 Global Pesticide Active Ingredients Revenue by Company (2021-2026)

3.2.2 Global Pesticide Active Ingredients Revenue Market Share by Company (2021-2026)

3.3 Global Pesticide Active Ingredients Sale Price by Company

3.4 Key Manufacturers Pesticide Active Ingredients Producing Area Distribution, Sales Area, Product Type

3.4.1 Key Manufacturers Pesticide Active Ingredients Product Location Distribution

3.4.2 Players Pesticide Active Ingredients 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 PESTICIDE ACTIVE INGREDIENTS BY GEOGRAPHIC REGION

4.1 World Historic Pesticide Active Ingredients Market Size by Geographic Region (2021-2026)

4.1.1 Global Pesticide Active Ingredients Annual Sales by Geographic Region (2021-2026)

4.1.2 Global Pesticide Active Ingredients Annual Revenue by Geographic Region (2021-2026)

4.2 World Historic Pesticide Active Ingredients Market Size by Country/Region (2021-2026)

4.2.1 Global Pesticide Active Ingredients Annual Sales by Country/Region (2021-2026)

4.2.2 Global Pesticide Active Ingredients Annual Revenue by Country/Region (2021-2026)

- 4.3 Americas Pesticide Active Ingredients Sales Growth
- 4.4 APAC Pesticide Active Ingredients Sales Growth
- 4.5 Europe Pesticide Active Ingredients Sales Growth
- 4.6 Middle East & Africa Pesticide Active Ingredients Sales Growth

5 AMERICAS

- 5.1 Americas Pesticide Active Ingredients Sales by Country
 - 5.1.1 Americas Pesticide Active Ingredients Sales by Country (2021-2026)
 - 5.1.2 Americas Pesticide Active Ingredients Revenue by Country (2021-2026)
- 5.2 Americas Pesticide Active Ingredients Sales by Pesticide Type (2021-2026)
- 5.3 Americas Pesticide Active Ingredients Sales by Application (2021-2026)
- 5.4 United States
- 5.5 Canada
- 5.6 Mexico
- 5.7 Brazil

6 APAC

- 6.1 APAC Pesticide Active Ingredients Sales by Region
 - 6.1.1 APAC Pesticide Active Ingredients Sales by Region (2021-2026)
 - 6.1.2 APAC Pesticide Active Ingredients Revenue by Region (2021-2026)
- 6.2 APAC Pesticide Active Ingredients Sales by Pesticide Type (2021-2026)
- 6.3 APAC Pesticide Active Ingredients 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 Pesticide Active Ingredients by Country
 - 7.1.1 Europe Pesticide Active Ingredients Sales by Country (2021-2026)
 - 7.1.2 Europe Pesticide Active Ingredients Revenue by Country (2021-2026)
- 7.2 Europe Pesticide Active Ingredients Sales by Pesticide Type (2021-2026)
- 7.3 Europe Pesticide Active Ingredients 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 Pesticide Active Ingredients by Country
 - 8.1.1 Middle East & Africa Pesticide Active Ingredients Sales by Country (2021-2026)
 - 8.1.2 Middle East & Africa Pesticide Active Ingredients Revenue by Country (2021-2026)
- 8.2 Middle East & Africa Pesticide Active Ingredients Sales by Pesticide Type (2021-2026)
- 8.3 Middle East & Africa Pesticide Active Ingredients 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 Pesticide Active Ingredients
- 10.3 Manufacturing Process Analysis of Pesticide Active Ingredients
- 10.4 Industry Chain Structure of Pesticide Active Ingredients

11 MARKETING, DISTRIBUTORS AND CUSTOMER

- 11.1 Sales Channel
 - 11.1.1 Direct Channels
 - 11.1.2 Indirect Channels

11.2 Pesticide Active Ingredients Distributors

11.3 Pesticide Active Ingredients Customer

12 WORLD FORECAST REVIEW FOR PESTICIDE ACTIVE INGREDIENTS BY GEOGRAPHIC REGION

12.1 Global Pesticide Active Ingredients Market Size Forecast by Region

12.1.1 Global Pesticide Active Ingredients Forecast by Region (2027-2032)

12.1.2 Global Pesticide Active Ingredients 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 Pesticide Active Ingredients Forecast by Pesticide Type (2027-2032)

12.7 Global Pesticide Active Ingredients Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Syngenta Group

13.1.1 Syngenta Group Company Information

13.1.2 Syngenta Group Pesticide Active Ingredients Product Portfolios and Specifications

13.1.3 Syngenta Group Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.1.4 Syngenta Group Main Business Overview

13.1.5 Syngenta Group Latest Developments

13.2 Bayer

13.2.1 Bayer Company Information

13.2.2 Bayer Pesticide Active Ingredients Product Portfolios and Specifications

13.2.3 Bayer Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.2.4 Bayer Main Business Overview

13.2.5 Bayer Latest Developments

13.3 BASF

13.3.1 BASF Company Information

13.3.2 BASF Pesticide Active Ingredients Product Portfolios and Specifications

13.3.3 BASF Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

- 13.3.4 BASF Main Business Overview
- 13.3.5 BASF Latest Developments
- 13.4 Corteva
 - 13.4.1 Corteva Company Information
 - 13.4.2 Corteva Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.4.3 Corteva Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Corteva Main Business Overview
 - 13.4.5 Corteva Latest Developments
- 13.5 FMC
 - 13.5.1 FMC Company Information
 - 13.5.2 FMC Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.5.3 FMC Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.5.4 FMC Main Business Overview
 - 13.5.5 FMC Latest Developments
- 13.6 UPL
 - 13.6.1 UPL Company Information
 - 13.6.2 UPL Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.6.3 UPL Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 UPL Main Business Overview
 - 13.6.5 UPL Latest Developments
- 13.7 ADAMA
 - 13.7.1 ADAMA Company Information
 - 13.7.2 ADAMA Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.7.3 ADAMA Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 ADAMA Main Business Overview
 - 13.7.5 ADAMA Latest Developments
- 13.8 Albaugh
 - 13.8.1 Albaugh Company Information
 - 13.8.2 Albaugh Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.8.3 Albaugh Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Albaugh Main Business Overview
 - 13.8.5 Albaugh Latest Developments
- 13.9 Sipcam Oxon
 - 13.9.1 Sipcam Oxon Company Information

- 13.9.2 Sipcam Oxon Pesticide Active Ingredients Product Portfolios and Specifications
- 13.9.3 Sipcam Oxon Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.9.4 Sipcam Oxon Main Business Overview
- 13.9.5 Sipcam Oxon Latest Developments
- 13.10 Nufarm
 - 13.10.1 Nufarm Company Information
 - 13.10.2 Nufarm Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.10.3 Nufarm Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.10.4 Nufarm Main Business Overview
 - 13.10.5 Nufarm Latest Developments
- 13.11 Sumitomo Chemical
 - 13.11.1 Sumitomo Chemical Company Information
 - 13.11.2 Sumitomo Chemical Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.11.3 Sumitomo Chemical Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Sumitomo Chemical Main Business Overview
 - 13.11.5 Sumitomo Chemical Latest Developments
- 13.12 Nissan Chemical
 - 13.12.1 Nissan Chemical Company Information
 - 13.12.2 Nissan Chemical Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.12.3 Nissan Chemical Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Nissan Chemical Main Business Overview
 - 13.12.5 Nissan Chemical Latest Developments
- 13.13 Ishihara Sangyo Kaisha
 - 13.13.1 Ishihara Sangyo Kaisha Company Information
 - 13.13.2 Ishihara Sangyo Kaisha Pesticide Active Ingredients Product Portfolios and Specifications
 - 13.13.3 Ishihara Sangyo Kaisha Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 Ishihara Sangyo Kaisha Main Business Overview
 - 13.13.5 Ishihara Sangyo Kaisha Latest Developments
- 13.14 Kumiai Chemical Industry
 - 13.14.1 Kumiai Chemical Industry Company Information
 - 13.14.2 Kumiai Chemical Industry Pesticide Active Ingredients Product Portfolios and

Specifications

13.14.3 Kumiai Chemical Industry Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.14.4 Kumiai Chemical Industry Main Business Overview

13.14.5 Kumiai Chemical Industry Latest Developments

13.15 Nippon Soda

13.15.1 Nippon Soda Company Information

13.15.2 Nippon Soda Pesticide Active Ingredients Product Portfolios and

Specifications

13.15.3 Nippon Soda Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Nippon Soda Main Business Overview

13.15.5 Nippon Soda Latest Developments

13.16 Zhejiang Xin'an Chemical Group

13.16.1 Zhejiang Xin'an Chemical Group Company Information

13.16.2 Zhejiang Xin'an Chemical Group Pesticide Active Ingredients Product

Portfolios and Specifications

13.16.3 Zhejiang Xin'an Chemical Group Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Zhejiang Xin'an Chemical Group Main Business Overview

13.16.5 Zhejiang Xin'an Chemical Group Latest Developments

13.17 Hubei Xingfa Group

13.17.1 Hubei Xingfa Group Company Information

13.17.2 Hubei Xingfa Group Pesticide Active Ingredients Product Portfolios and

Specifications

13.17.3 Hubei Xingfa Group Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.17.4 Hubei Xingfa Group Main Business Overview

13.17.5 Hubei Xingfa Group Latest Developments

13.18 Jiangsu Yangnong Chemical

13.18.1 Jiangsu Yangnong Chemical Company Information

13.18.2 Jiangsu Yangnong Chemical Pesticide Active Ingredients Product Portfolios and Specifications

13.18.3 Jiangsu Yangnong Chemical Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.18.4 Jiangsu Yangnong Chemical Main Business Overview

13.18.5 Jiangsu Yangnong Chemical Latest Developments

13.19 Lier Chemical

13.19.1 Lier Chemical Company Information

13.19.2 Lier Chemical Pesticide Active Ingredients Product Portfolios and Specifications

13.19.3 Lier Chemical Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.19.4 Lier Chemical Main Business Overview

13.19.5 Lier Chemical Latest Developments

13.20 Gharda Chemicals

13.20.1 Gharda Chemicals Company Information

13.20.2 Gharda Chemicals Pesticide Active Ingredients Product Portfolios and Specifications

13.20.3 Gharda Chemicals Pesticide Active Ingredients Sales, Revenue, Price and Gross Margin (2021-2026)

13.20.4 Gharda Chemicals Main Business Overview

13.20.5 Gharda Chemicals Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

Table 1. Pesticide Active Ingredients Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)

Table 2. Pesticide Active Ingredients Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)

Table 3. Major Players of Herbicide Active Ingredient

Table 4. Major Players of Insecticide Active Ingredient

Table 5. Major Players of Fungicide and Bactericide Active Ingredient

Table 6. Major Players of Plant Growth Regulator Active Ingredient

Table 7. Major Players of Other Pesticide Active Ingredient

Table 8. Global Pesticide Active Ingredients Sales by Pesticide Type (2021-2026) & (Kilotons)

Table 9. Global Pesticide Active Ingredients Sales Market Share by Pesticide Type (2021-2026)

Table 10. Global Pesticide Active Ingredients Revenue by Pesticide Type (2021-2026) & (\$ million)

Table 11. Global Pesticide Active Ingredients Revenue Market Share by Pesticide Type (2021-2026)

Table 12. Global Pesticide Active Ingredients Sale Price by Pesticide Type (2021-2026) & (US\$/Ton)

Table 13. Major Players of Conventional Synthetic Active Ingredient

Table 14. Major Players of Biochemical Active Ingredient

Table 15. Major Players of Microbial Active Ingredient

Table 16. Major Players of Inorganic Mineral Active Ingredient

Table 17. Global Pesticide Active Ingredients Sales by Origin (2021-2026) & (Kilotons)

Table 18. Global Pesticide Active Ingredients Sales Market Share by Origin (2021-2026)

Table 19. Global Pesticide Active Ingredients Revenue by Origin (2021-2026) & (\$ million)

Table 20. Global Pesticide Active Ingredients Revenue Market Share by Origin (2021-2026)

Table 21. Global Pesticide Active Ingredients Sale Price by Origin (2021-2026) & (US\$/Ton)

Table 22. Major Players of Acid or Neutral Active Substance

Table 23. Major Players of Salt Active Substance

Table 24. Major Players of Ester Active Substance

Table 25. Major Players of Other Derivative Active Substance

Table 26. Global Pesticide Active Ingredients Sales by Active Substance Form (2021-2026) & (Kilotons)

Table 27. Global Pesticide Active Ingredients Sales Market Share by Active Substance Form (2021-2026)

Table 28. Global Pesticide Active Ingredients Revenue by Active Substance Form (2021-2026) & (\$ million)

Table 29. Global Pesticide Active Ingredients Revenue Market Share by Active Substance Form (2021-2026)

Table 30. Global Pesticide Active Ingredients Sale Price by Active Substance Form (2021-2026) & (US\$/Ton)

Table 31. Major Players of Stockholm Listed Active Ingredient

Table 32. Major Players of Banned or Cancelled in Major Jurisdictions

Table 33. Major Players of Phase Out Underway with Existing Stocks

Table 34. Major Players of Restricted or Substitution Candidate

Table 35. Major Players of Approved or Registered Active Ingredient

Table 36. Global Pesticide Active Ingredients Sales by Phase-Out Status (2021-2026) & (Kilotons)

Table 37. Global Pesticide Active Ingredients Sales Market Share by Phase-Out Status (2021-2026)

Table 38. Global Pesticide Active Ingredients Revenue by Phase-Out Status (2021-2026) & (\$ million)

Table 39. Global Pesticide Active Ingredients Revenue Market Share by Phase-Out Status (2021-2026)

Table 40. Global Pesticide Active Ingredients Sale Price by Phase-Out Status (2021-2026) & (US\$/Ton)

Table 41. Global Pesticide Active Ingredients Sale by Application (2021-2026) & (Kilotons)

Table 42. Global Pesticide Active Ingredients Sale Market Share by Application (2021-2026)

Table 43. Global Pesticide Active Ingredients Revenue by Application (2021-2026) & (\$ million)

Table 44. Global Pesticide Active Ingredients Revenue Market Share by Application (2021-2026)

Table 45. Global Pesticide Active Ingredients Sale Price by Application (2021-2026) & (US\$/Ton)

Table 46. Global Pesticide Active Ingredients Sales by Company (2021-2026) & (Kilotons)

Table 47. Global Pesticide Active Ingredients Sales Market Share by Company (2021-2026)

Table 48. Global Pesticide Active Ingredients Revenue by Company (2021-2026) & (\$ millions)

Table 49. Global Pesticide Active Ingredients Revenue Market Share by Company (2021-2026)

Table 50. Global Pesticide Active Ingredients Sale Price by Company (2021-2026) & (US\$/Ton)

Table 51. Key Manufacturers Pesticide Active Ingredients Producing Area Distribution and Sales Area

Table 52. Players Pesticide Active Ingredients Products Offered

Table 53. Pesticide Active Ingredients Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 54. New Products and Potential Entrants

Table 55. Market M&A Activity & Strategy

Table 56. Global Pesticide Active Ingredients Sales by Geographic Region (2021-2026) & (Kilotons)

Table 57. Global Pesticide Active Ingredients Sales Market Share Geographic Region (2021-2026)

Table 58. Global Pesticide Active Ingredients Revenue by Geographic Region (2021-2026) & (\$ millions)

Table 59. Global Pesticide Active Ingredients Revenue Market Share by Geographic Region (2021-2026)

Table 60. Global Pesticide Active Ingredients Sales by Country/Region (2021-2026) & (Kilotons)

Table 61. Global Pesticide Active Ingredients Sales Market Share by Country/Region (2021-2026)

Table 62. Global Pesticide Active Ingredients Revenue by Country/Region (2021-2026) & (\$ millions)

Table 63. Global Pesticide Active Ingredients Revenue Market Share by Country/Region (2021-2026)

Table 64. Americas Pesticide Active Ingredients Sales by Country (2021-2026) & (Kilotons)

Table 65. Americas Pesticide Active Ingredients Sales Market Share by Country (2021-2026)

Table 66. Americas Pesticide Active Ingredients Revenue by Country (2021-2026) & (\$ millions)

Table 67. Americas Pesticide Active Ingredients Sales by Pesticide Type (2021-2026) & (Kilotons)

Table 68. Americas Pesticide Active Ingredients Sales by Application (2021-2026) & (Kilotons)

- Table 69. APAC Pesticide Active Ingredients Sales by Region (2021-2026) & (Kilotons)
- Table 70. APAC Pesticide Active Ingredients Sales Market Share by Region (2021-2026)
- Table 71. APAC Pesticide Active Ingredients Revenue by Region (2021-2026) & (\$ millions)
- Table 72. APAC Pesticide Active Ingredients Sales by Pesticide Type (2021-2026) & (Kilotons)
- Table 73. APAC Pesticide Active Ingredients Sales by Application (2021-2026) & (Kilotons)
- Table 74. Europe Pesticide Active Ingredients Sales by Country (2021-2026) & (Kilotons)
- Table 75. Europe Pesticide Active Ingredients Revenue by Country (2021-2026) & (\$ millions)
- Table 76. Europe Pesticide Active Ingredients Sales by Pesticide Type (2021-2026) & (Kilotons)
- Table 77. Europe Pesticide Active Ingredients Sales by Application (2021-2026) & (Kilotons)
- Table 78. Middle East & Africa Pesticide Active Ingredients Sales by Country (2021-2026) & (Kilotons)
- Table 79. Middle East & Africa Pesticide Active Ingredients Revenue Market Share by Country (2021-2026)
- Table 80. Middle East & Africa Pesticide Active Ingredients Sales by Pesticide Type (2021-2026) & (Kilotons)
- Table 81. Middle East & Africa Pesticide Active Ingredients Sales by Application (2021-2026) & (Kilotons)
- Table 82. Key Market Drivers & Growth Opportunities of Pesticide Active Ingredients
- Table 83. Key Market Challenges & Risks of Pesticide Active Ingredients
- Table 84. Key Industry Trends of Pesticide Active Ingredients
- Table 85. Pesticide Active Ingredients Raw Material
- Table 86. Key Suppliers of Raw Materials
- Table 87. Pesticide Active Ingredients Distributors List
- Table 88. Pesticide Active Ingredients Customer List
- Table 89. Global Pesticide Active Ingredients Sales Forecast by Region (2027-2032) & (Kilotons)
- Table 90. Global Pesticide Active Ingredients Revenue Forecast by Region (2027-2032) & (\$ millions)
- Table 91. Americas Pesticide Active Ingredients Sales Forecast by Country (2027-2032) & (Kilotons)
- Table 92. Americas Pesticide Active Ingredients Annual Revenue Forecast by Country

(2027-2032) & (\$ millions)

Table 93. APAC Pesticide Active Ingredients Sales Forecast by Region (2027-2032) & (Kilotons)

Table 94. APAC Pesticide Active Ingredients Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 95. Europe Pesticide Active Ingredients Sales Forecast by Country (2027-2032) & (Kilotons)

Table 96. Europe Pesticide Active Ingredients Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 97. Middle East & Africa Pesticide Active Ingredients Sales Forecast by Country (2027-2032) & (Kilotons)

Table 98. Middle East & Africa Pesticide Active Ingredients Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 99. Global Pesticide Active Ingredients Sales Forecast by Pesticide Type (2027-2032) & (Kilotons)

Table 100. Global Pesticide Active Ingredients Revenue Forecast by Pesticide Type (2027-2032) & (\$ millions)

Table 101. Global Pesticide Active Ingredients Sales Forecast by Application (2027-2032) & (Kilotons)

Table 102. Global Pesticide Active Ingredients Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 103. Syngenta Group Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 104. Syngenta Group Pesticide Active Ingredients Product Portfolios and Specifications

Table 105. Syngenta Group Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 106. Syngenta Group Main Business

Table 107. Syngenta Group Latest Developments

Table 108. Bayer Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 109. Bayer Pesticide Active Ingredients Product Portfolios and Specifications

Table 110. Bayer Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 111. Bayer Main Business

Table 112. Bayer Latest Developments

Table 113. BASF Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 114. BASF Pesticide Active Ingredients Product Portfolios and Specifications

Table 115. BASF Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 116. BASF Main Business

Table 117. BASF Latest Developments

Table 118. Corteva Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 119. Corteva Pesticide Active Ingredients Product Portfolios and Specifications

Table 120. Corteva Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 121. Corteva Main Business

Table 122. Corteva Latest Developments

Table 123. FMC Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 124. FMC Pesticide Active Ingredients Product Portfolios and Specifications

Table 125. FMC Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 126. FMC Main Business

Table 127. FMC Latest Developments

Table 128. UPL Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 129. UPL Pesticide Active Ingredients Product Portfolios and Specifications

Table 130. UPL Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 131. UPL Main Business

Table 132. UPL Latest Developments

Table 133. ADAMA Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 134. ADAMA Pesticide Active Ingredients Product Portfolios and Specifications

Table 135. ADAMA Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 136. ADAMA Main Business

Table 137. ADAMA Latest Developments

Table 138. Albaugh Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 139. Albaugh Pesticide Active Ingredients Product Portfolios and Specifications

Table 140. Albaugh Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 141. Albaugh Main Business

Table 142. Albaugh Latest Developments

Table 143. Sipcam Oxon Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 144. Sipcam Oxon Pesticide Active Ingredients Product Portfolios and Specifications

Table 145. Sipcam Oxon Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 146. Sipcam Oxon Main Business

Table 147. Sipcam Oxon Latest Developments

Table 148. Nufarm Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 149. Nufarm Pesticide Active Ingredients Product Portfolios and Specifications

Table 150. Nufarm Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 151. Nufarm Main Business

Table 152. Nufarm Latest Developments

Table 153. Sumitomo Chemical Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 154. Sumitomo Chemical Pesticide Active Ingredients Product Portfolios and Specifications

Table 155. Sumitomo Chemical Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 156. Sumitomo Chemical Main Business

Table 157. Sumitomo Chemical Latest Developments

Table 158. Nissan Chemical Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 159. Nissan Chemical Pesticide Active Ingredients Product Portfolios and Specifications

Table 160. Nissan Chemical Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 161. Nissan Chemical Main Business

Table 162. Nissan Chemical Latest Developments

Table 163. Ishihara Sangyo Kaisha Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 164. Ishihara Sangyo Kaisha Pesticide Active Ingredients Product Portfolios and Specifications

Table 165. Ishihara Sangyo Kaisha Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 166. Ishihara Sangyo Kaisha Main Business

Table 167. Ishihara Sangyo Kaisha Latest Developments

Table 168. Kumiai Chemical Industry Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 169. Kumiai Chemical Industry Pesticide Active Ingredients Product Portfolios and Specifications

Table 170. Kumiai Chemical Industry Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 171. Kumiai Chemical Industry Main Business

Table 172. Kumiai Chemical Industry Latest Developments

Table 173. Nippon Soda Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 174. Nippon Soda Pesticide Active Ingredients Product Portfolios and Specifications

Table 175. Nippon Soda Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 176. Nippon Soda Main Business

Table 177. Nippon Soda Latest Developments

Table 178. Zhejiang Xin'an Chemical Group Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 179. Zhejiang Xin'an Chemical Group Pesticide Active Ingredients Product Portfolios and Specifications

Table 180. Zhejiang Xin'an Chemical Group Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 181. Zhejiang Xin'an Chemical Group Main Business

Table 182. Zhejiang Xin'an Chemical Group Latest Developments

Table 183. Hubei Xingfa Group Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 184. Hubei Xingfa Group Pesticide Active Ingredients Product Portfolios and Specifications

Table 185. Hubei Xingfa Group Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 186. Hubei Xingfa Group Main Business

Table 187. Hubei Xingfa Group Latest Developments

Table 188. Jiangsu Yangnong Chemical Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 189. Jiangsu Yangnong Chemical Pesticide Active Ingredients Product Portfolios and Specifications

Table 190. Jiangsu Yangnong Chemical Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 191. Jiangsu Yangnong Chemical Main Business

Table 192. Jiangsu Yangnong Chemical Latest Developments

Table 193. Lier Chemical Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 194. Lier Chemical Pesticide Active Ingredients Product Portfolios and Specifications

Table 195. Lier Chemical Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 196. Lier Chemical Main Business

Table 197. Lier Chemical Latest Developments

Table 198. Gharda Chemicals Basic Information, Pesticide Active Ingredients Manufacturing Base, Sales Area and Its Competitors

Table 199. Gharda Chemicals Pesticide Active Ingredients Product Portfolios and Specifications

Table 200. Gharda Chemicals Pesticide Active Ingredients Sales (Kilotons), Revenue (\$ Million), Price (US\$/Ton) and Gross Margin (2021-2026)

Table 201. Gharda Chemicals Main Business

Table 202. Gharda Chemicals Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Pesticide Active Ingredients
- Figure 2. Pesticide Active Ingredients Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Pesticide Active Ingredients Sales Growth Rate 2021-2032 (Kilotons)
- Figure 7. Global Pesticide Active Ingredients Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Pesticide Active Ingredients Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Pesticide Active Ingredients Sales Market Share by Country/Region (2025)
- Figure 10. Pesticide Active Ingredients Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of Herbicide Active Ingredient
- Figure 12. Product Picture of Insecticide Active Ingredient
- Figure 13. Product Picture of Fungicide and Bactericide Active Ingredient
- Figure 14. Product Picture of Plant Growth Regulator Active Ingredient
- Figure 15. Product Picture of Other Pesticide Active Ingredient
- Figure 16. Global Pesticide Active Ingredients Sales Market Share by Pesticide Type in 2026
- Figure 17. Global Pesticide Active Ingredients Revenue Market Share by Pesticide Type (2021-2026)
- Figure 18. Product Picture of Conventional Synthetic Active Ingredient
- Figure 19. Product Picture of Biochemical Active Ingredient
- Figure 20. Product Picture of Microbial Active Ingredient
- Figure 21. Product Picture of Inorganic Mineral Active Ingredient
- Figure 22. Global Pesticide Active Ingredients Sales Market Share by Origin in 2026
- Figure 23. Global Pesticide Active Ingredients Revenue Market Share by Origin (2021-2026)
- Figure 24. Product Picture of Acid or Neutral Active Substance
- Figure 25. Product Picture of Salt Active Substance
- Figure 26. Product Picture of Ester Active Substance
- Figure 27. Product Picture of Other Derivative Active Substance
- Figure 28. Global Pesticide Active Ingredients Sales Market Share by Active Substance Form in 2026

Figure 29. Global Pesticide Active Ingredients Revenue Market Share by Active Substance Form (2021-2026)

Figure 30. Product Picture of Stockholm Listed Active Ingredient

Figure 31. Product Picture of Banned or Cancelled in Major Jurisdictions

Figure 32. Product Picture of Phase Out Underway with Existing Stocks

Figure 33. Product Picture of Restricted or Substitution Candidate

Figure 34. Product Picture of Approved or Registered Active Ingredient

Figure 35. Global Pesticide Active Ingredients Sales Market Share by Phase-Out Status in 2026

Figure 36. Global Pesticide Active Ingredients Revenue Market Share by Phase-Out Status (2021-2026)

Figure 37. Pesticide Active Ingredients Consumed in Field Crops

Figure 38. Global Pesticide Active Ingredients Market: Field Crops (2021-2026) & (Kilotons)

Figure 39. Pesticide Active Ingredients Consumed in Horticulture Crops

Figure 40. Global Pesticide Active Ingredients Market: Horticulture Crops (2021-2026) & (Kilotons)

Figure 41. Pesticide Active Ingredients Consumed in Seed Treatment

Figure 42. Global Pesticide Active Ingredients Market: Seed Treatment (2021-2026) & (Kilotons)

Figure 43. Pesticide Active Ingredients Consumed in Turf and Ornamentals

Figure 44. Global Pesticide Active Ingredients Market: Turf and Ornamentals (2021-2026) & (Kilotons)

Figure 45. Pesticide Active Ingredients Consumed in Public Health Vector Control

Figure 46. Global Pesticide Active Ingredients Market: Public Health Vector Control (2021-2026) & (Kilotons)

Figure 47. Pesticide Active Ingredients Consumed in Structural and Household Pest Control

Figure 48. Global Pesticide Active Ingredients Market: Structural and Household Pest Control (2021-2026) & (Kilotons)

Figure 49. Global Pesticide Active Ingredients Sale Market Share by Application (2025)

Figure 50. Global Pesticide Active Ingredients Revenue Market Share by Application in 2026

Figure 51. Pesticide Active Ingredients Sales by Company in 2026 (Kilotons)

Figure 52. Global Pesticide Active Ingredients Sales Market Share by Company in 2026

Figure 53. Pesticide Active Ingredients Revenue by Company in 2026 (\$ millions)

Figure 54. Global Pesticide Active Ingredients Revenue Market Share by Company in 2026

Figure 55. Global Pesticide Active Ingredients Sales Market Share by Geographic

Region (2021-2026)

Figure 56. Global Pesticide Active Ingredients Revenue Market Share by Geographic Region in 2026

Figure 57. Americas Pesticide Active Ingredients Sales 2021-2026 (Kilotons)

Figure 58. Americas Pesticide Active Ingredients Revenue 2021-2026 (\$ millions)

Figure 59. APAC Pesticide Active Ingredients Sales 2021-2026 (Kilotons)

Figure 60. APAC Pesticide Active Ingredients Revenue 2021-2026 (\$ millions)

Figure 61. Europe Pesticide Active Ingredients Sales 2021-2026 (Kilotons)

Figure 62. Europe Pesticide Active Ingredients Revenue 2021-2026 (\$ millions)

Figure 63. Middle East & Africa Pesticide Active Ingredients Sales 2021-2026 (Kilotons)

Figure 64. Middle East & Africa Pesticide Active Ingredients Revenue 2021-2026 (\$ millions)

Figure 65. Americas Pesticide Active Ingredients Sales Market Share by Country in 2026

Figure 66. Americas Pesticide Active Ingredients Revenue Market Share by Country (2021-2026)

Figure 67. Americas Pesticide Active Ingredients Sales Market Share by Pesticide Type (2021-2026)

Figure 68. Americas Pesticide Active Ingredients Sales Market Share by Application (2021-2026)

Figure 69. United States Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 70. Canada Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 71. Mexico Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 72. Brazil Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 73. APAC Pesticide Active Ingredients Sales Market Share by Region in 2026

Figure 74. APAC Pesticide Active Ingredients Revenue Market Share by Region (2021-2026)

Figure 75. APAC Pesticide Active Ingredients Sales Market Share by Pesticide Type (2021-2026)

Figure 76. APAC Pesticide Active Ingredients Sales Market Share by Application (2021-2026)

Figure 77. China Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 78. Japan Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 79. South Korea Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 80. Southeast Asia Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

Figure 81. India Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)

- Figure 82. Australia Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 83. China Taiwan Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 84. Europe Pesticide Active Ingredients Sales Market Share by Country in 2026
- Figure 85. Europe Pesticide Active Ingredients Revenue Market Share by Country (2021-2026)
- Figure 86. Europe Pesticide Active Ingredients Sales Market Share by Pesticide Type (2021-2026)
- Figure 87. Europe Pesticide Active Ingredients Sales Market Share by Application (2021-2026)
- Figure 88. Germany Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 89. France Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 90. UK Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 91. Italy Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 92. Russia Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 93. Middle East & Africa Pesticide Active Ingredients Sales Market Share by Country (2021-2026)
- Figure 94. Middle East & Africa Pesticide Active Ingredients Sales Market Share by Pesticide Type (2021-2026)
- Figure 95. Middle East & Africa Pesticide Active Ingredients Sales Market Share by Application (2021-2026)
- Figure 96. Egypt Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 97. South Africa Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 98. Israel Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 99. Turkey Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 100. GCC Countries Pesticide Active Ingredients Revenue Growth 2021-2026 (\$ millions)
- Figure 101. Manufacturing Cost Structure Analysis of Pesticide Active Ingredients in 2026
- Figure 102. Manufacturing Process Analysis of Pesticide Active Ingredients
- Figure 103. Industry Chain Structure of Pesticide Active Ingredients
- Figure 104. Channels of Distribution
- Figure 105. Global Pesticide Active Ingredients Sales Market Forecast by Region (2027-2032)
- Figure 106. Global Pesticide Active Ingredients Revenue Market Share Forecast by Region (2027-2032)

Figure 107. Global Pesticide Active Ingredients Sales Market Share Forecast by Pesticide Type (2027-2032)

Figure 108. Global Pesticide Active Ingredients Revenue Market Share Forecast by Pesticide Type (2027-2032)

Figure 109. Global Pesticide Active Ingredients Sales Market Share Forecast by Application (2027-2032)

Figure 110. Global Pesticide Active Ingredients Revenue Market Share Forecast by Application (2027-2032)

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