

# Brazil Crop Protection Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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## Abstracts

The Brazil Crop Protection Chemicals Market size is estimated at 33.00 billion USD in 2024, and is expected to reach 41.48 billion USD by 2029, growing at a CAGR of 4.68% during the forecast period (2024-2029).

Insecticides occupy the largest share of the Brazilian crop protection chemicals market

Insect pests, diseases, and weeds are emerging as significant problems in Brazil's agriculture sector. To counter these threats effectively, farmers predominantly depend on pesticides as the primary defense against these pests. Insecticides held the largest share of 48.3% of the Brazilian crop protection chemicals market in 2022.

Pulses & oilseeds dominate the consumption of insecticides in Brazil, with a share of 49.6% in 2022. Soybean cultivation in Brazil faces numerous pest challenges, with lepidopterans and stink bugs being the primary pests requiring special attention. Particularly, the southern armyworm is known to inflict a significant 17.0% yield loss on soybean production.

The market for herbicides in Brazil witnessed a positive trend during the historical period (2017-2022), which rose to USD 10.69 billion in 2022. The prevalence of resistant weeds in certain areas, coupled with estimated production losses of 10-20% due to crop-weed competition, results in annual losses exceeding USD 1.0 billion for each crop.

Soybean production in the Southern Amazon region is at risk from the Phakopsora

pachyrhizi fungus, recognized as Asian soybean rust. This pathogen induces staggering yield reductions, with estimates reaching as high as 90%. Since its initial outbreak in 2000, it has consistently led to annual yield diminutions ranging between 360,000 and 4.6 million ton.

In 2022, the consumption of nematicides in the country was predominantly driven by pulses and oilseeds, representing a share of 49.6%. In Brazil, the nematode's impact on soybean cultivars varies based on the region and genetic background, resulting in yield losses as high as 30%.

The need to increase crop yields in Brazil is anticipated to drive the market for pesticides in 2022.

## Brazil Crop Protection Chemicals Market Trends

Growing herbicide-resistant cultivars and weeds boosting herbicides' consumption per hectare

Brazil has witnessed a substantial surge in the consumption of pesticides per hectare, reaching an impressive increase of 1,700 g per hectare between 2017 and 2022. This remarkable growth can be predominantly linked to the profound impact of climate changes, characterized by heightened occurrences of droughts, heatwaves, and other favorable conditions that promote the proliferation of fungal diseases, weeds, and insect pests. As a consequence, farmers are facing major yield losses in their crops.

In response to these climate challenges and driven by the pressing need to boost crop production, farmers are increasingly turning to the adoption of pesticides as a primary measure. While alternative methods of pest and disease control exist, they often entail higher production costs, making pesticides a more practical and cost-effective solution for many farmers. Moreover, the severity of crop infestations plays a pivotal role in influencing pesticide usage and application rates. As infestations escalate, farmers are compelled to intensify the application of pesticides to effectively mitigate losses and secure higher yields. As a result, the consumption of crop protection chemicals continues to climb steadily, shaping the agricultural landscape in Brazil.

Among all, herbicide consumption per hectare grew significantly during the historical period, representing a growth of 2,177 g per hectare in 2022 compared to 2017, which

is majorly attributed to the increase in weed infestations. On average, every year, weeds cause 14% crop loss, resulting in increased herbicide-resistant cultivars and weed resistance to herbicides. As of 2020, 51 weed species were reported as being resistant to herbicides, which further increased herbicide usage and per hectare consumption.

Increasing demand and import tariffs are majorly altering the prices of active ingredients in the country

Brazil's agricultural sector heavily relies on agrochemical products to safeguard crops and enhance production. However, the country is significantly dependent on the import of these products, with the EU being a primary supplier. As a result of this reliance on imports, the prices of pesticides in Brazil are greatly influenced by currency exchange rates, import tariffs, and duties, which can cause fluctuations and volatility in the market.

Cypermethrin stands out among all active ingredients, commanding a price of USD 21,129 per metric ton. This higher cost is mainly due to the limited production of cypermethrin within the country. Additionally, Brazil ranks among the top 3 importers of cypermethrin globally, with the European Union being a major exporter to Brazil under the EU-Mercosur deal. These factors contribute to the premium price of cypermethrin in the market.

In 2018, the price of Atrazine saw a significant surge, reaching USD 15.019 thousand per metric ton. This represented a substantial increase of 9.4% compared to 2017. The sudden upswing in Atrazine's cost is primarily linked to the escalating demand for the product, which is mainly imported from EU countries. The situation is noteworthy as Atrazine is banned in the European Union for domestic use but permitted solely for export purposes, causing a supply-demand imbalance and driving the price higher. It was among the top 3 highest-selling active ingredients in Brazil in 2018.

Glyphosate, malathion, and mancozeb are the primary pesticides extensively utilized, and their active ingredient prices are witnessing yearly increases. These price hikes can be attributed to the growing demand for these products and the escalating costs of raw materials used in their production.

## Brazil Crop Protection Chemicals Industry Overview

The Brazil Crop Protection Chemicals Market is fragmented, with the top five companies occupying 26.89%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, FMC Corporation and Syngenta Group (sorted alphabetically).

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