

Agricultural Herbicide Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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Abstracts

Agricultural Herbicide Market Summary

Introduction

Agricultural herbicides are chemical agents used to control weeds in crop production, fruit orchards, gardening, forestry, and other applications, encompassing chlorophenoxy acid herbicides, triazine herbicides, organic phosphorus herbicides, and other types. These products enhance crop yields by eliminating weed competition, offering broad-spectrum or selective action depending on the formulation. The market is characterized by its widespread use, environmental impact concerns, and ongoing innovation to address resistance and sustainability. It serves the agriculture industry's need for efficient weed management, reflecting a sector driven by rising food demand, increasing herbicide resistance, and advancements in chemical technology. Key growth drivers include expanding agricultural land, intensifying crop production, and the need for sustainable weed control solutions.

Market Size and Growth Forecast

The global agricultural herbicide market is estimated to reach USD 24 to 37 billion in 2025, with a projected compound annual growth rate (CAGR) of 3.0% to 4.0% from 2025 to 2030. This growth is driven by steady demand for weed control and incremental herbicide adoption.

Regional Analysis

North America: Holds 30-35% market share, with a growth rate of 3-4%. The United States leads with crop and fruit applications, while Canada focuses on forestry.

Europe: Accounts for 20-25% market share, with a growth rate of 2-3%. Germany and France drive demand, tempered by regulatory restrictions.

Asia Pacific: Represents 25-30% market share, with a growth rate of 4-5%. China and India dominate due to extensive crop production.

Rest of the World: Holds 15-20% market share, growing at 3-4%, with Brazil leading due to soybean and sugarcane needs.

Trends in North America favor high-volume use, while Europe emphasizes sustainable alternatives.

Application Analysis

Crop applications grow at 3-4%, driven by staple production, with trends toward organic phosphorus herbicides for broad-spectrum control. Fruit grows at 4-5%, fueled by orchard needs, with trends toward selective chlorophenoxy acids. Gardening grows at 3-4%, supporting small-scale use, with trends toward triazine herbicides. Forestry grows at 2-3%, aiding land management, with trends toward organic phosphorus types. Others, like turf, grow at 2-3%, with steady niche demand.

Product Type Analysis

Chlorophenoxy acid herbicides grow at 2-3%, valued for selective weed control, with trends toward use in fruits and gardening. Triazine herbicides grow at 3-4%, driven by soil residual action, with trends toward crop applications. Organic phosphorus herbicides grow at 4-5%, favored for broad-spectrum efficacy, with trends toward dominance in large-scale farming. Others, like urea-based herbicides, grow at 2-3%, with trends toward niche uses.

Key Market Players

Scotts: Based in Marysville, Ohio, USA, Scotts specializes in herbicides for gardening and turf. It serves North American markets with user-friendly, effective solutions for small-scale weed control.

Syngenta: Headquartered in Basel, Switzerland, Syngenta is a global agrochemical leader. It offers triazine and organic phosphorus herbicides for crops, serving farmers worldwide with high-efficacy products.

Bayer: Operating from Leverkusen, Germany, Bayer provides advanced herbicides. It develops chlorophenoxy and organic phosphorus solutions for crops and fruits, targeting global markets with precision technology.

DuPont: Based in Wilmington, Delaware, USA, DuPont focuses on innovative herbicides. It offers triazine and organic phosphorus products for crop applications, serving North American farmers with sustainable solutions.

Andersons: Headquartered in Maumee, Ohio, USA, Andersons specializes in herbicides for crops and turf. It caters to North American growers with practical, effective weed control options.

BASF: Operating from Ludwigshafen, Germany, BASF is a leading herbicide producer. It provides organic phosphorus and chlorophenoxy solutions for crops and forestry, serving global markets with robust products.

Sumitomo Chemical: Based in Tokyo, Japan, Sumitomo offers herbicides for crop and fruit applications. It serves Asian markets with high-quality, selective weed control solutions.

FMC: Headquartered in Philadelphia, Pennsylvania, USA, FMC focuses on advanced herbicides. It develops organic phosphorus products for crops, targeting global farmers with effective, innovative solutions.

SC Johnson: Operating from Racine, Wisconsin, USA, SC Johnson provides herbicides for gardening. It serves North American consumers with easy-to-use, reliable weed control products.

Bonide Products: Based in Oriskany, New York, USA, Bonide specializes in gardening herbicides. It offers chlorophenoxy solutions for small-scale use, targeting North American markets with affordable products.

Efekto: Operating from South Africa, Efeko focuses on herbicides for gardening and crops. It serves African markets with practical, effective weed control solutions.

Espoma Company: Headquartered in Millville, New Jersey, USA, Espoma offers organic herbicides. It caters to gardening and small-scale farming with sustainable, eco-friendly products.

Organic Laboratories: Based in Stuart, Florida, USA, Organic Laboratories develops natural herbicides. It serves gardening and crop markets with environmentally conscious weed control solutions.

These companies compete on efficacy, sustainability, and cost, driving the market with diverse offerings.

Porter's Five Forces Analysis

The threat of new entrants is moderate, requiring expertise and regulatory approval. Substitutes are medium, with manual weeding less practical. Buyer power is medium, with farmers negotiating prices, but weed control needs sustain demand. Supplier power is moderate, with raw materials widely available. Rivalry is high, with differentiation through efficacy and environmental impact.

Market Opportunities and Challenges

Opportunities

Rising crop production driving herbicide use.

Resistance management boosting innovation.

Demand for sustainable solutions enhancing market appeal.

Challenges

Environmental regulations limiting use.
Weed resistance reducing efficacy.
High R&D costs for new formulations.

Merger and Acquisition News

Agrochem Company Crystal Crop Buys Bayer's Herbicide Input Business (Date: June 2024): On June 15, 2024, Crystal Crop Protection Limited, an Indian agrochemical firm, acquired Bayer's herbicide input business, including select chlorophenoxy and organic phosphorus herbicide assets. This acquisition, valued at an undisclosed amount, bolsters Crystal Crop's portfolio for crop and fruit applications, enhancing its market presence in India and Asia Pacific. It integrates Bayer's advanced formulations, targeting large-scale farmers with improved weed control solutions.

Growth Trend Analysis

Statista forecasts global agricultural herbicide use to rise from 2.3 million metric tons in 2023 to 2.4 million metric tons by 2027, reflecting steady growth driven by crop yield needs and weed control demands. Benefits include enhanced productivity, but environmental impacts like soil and water contamination pose challenges. The market's 3-4% CAGR aligns with this trend, with Asia Pacific and North America leading due to intensive farming, despite regulatory pressures pushing sustainable alternatives.

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