

# Soil Fumigant Global Market Insights 2025, Analysis and Forecast to 2030, by Market Participants, Regions, Technology, Application, Product Type

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## Abstracts

### Soil Fumigant Market Summary

#### Introduction

Soil fumigants are chemical agents, such as 1,3-Dichloropropene, chloropicrin, and methyl bromide, applied to soil to control pests, nematodes, and pathogens in cereal and vegetable fields. The industry is characterized by its focus on high-efficacy pest control, regulatory compliance, and environmental safety, driven by the need for high-yield agriculture. Key trends include reduced-risk fumigants, precision application technologies, and non-

chemical alternatives, addressing concerns over soil health and residue management. The market is propelled by increasing pest resistance, global food demand, and the need for sustainable pest management solutions.

#### Market Size and Growth Forecast

The global Soil Fumigant market was valued at USD 1.1–1.8 billion in 2024, with an estimated CAGR of 4.5%–6.5% from 2025 to 2030, driven by pest control needs and regulatory shifts.

#### Regional Analysis

North America grows at 4.3%–6.3%; the U.S. leads due to large-scale cereal farming, with trends toward low-residue fumigants.

Europe achieves 4.0%–6.0% growth; France drives demand, focusing on sustainable pest control.

Asia Pacific records 5.0%–7.0% growth; China is a key market, with trends toward vegetable field applications.

Rest of the World grows at 4.0%–6.0%; Brazil shows potential, prioritizing nematode control in tropical crops.

### Application Analysis

Cereal Fields expand at 4.5%–6.5%; they dominate due to high grain demand, with trends favoring precision fumigation.

Vegetable Fields grow at 4.8%–6.8%; they support high-value crops, emphasizing low-toxicity solutions.

Others rise at 4.0%–6.0%; they include orchards, focusing on eco-friendly fumigants.

### Type Analysis

1,3-Dichloropropene expands at 4.8%–6.8%; it controls nematodes, with trends toward reduced-risk formulations.

Chloropicrin grows at 4.5%–6.5%; it targets soil pathogens, emphasizing precision application.

Methyl Bromide rises at 3.5%–5.5%; it faces regulatory restrictions, with trends toward phase-out alternatives.

Metam Sodium expands at 4.3%–6.3%; it suits vegetable fields, focusing on cost-efficiency.

Phosphine grows at 4.0%–6.0%; it is used for stored grains, with innovations in safety.

Others rise at 3.8%–5.8%; they include novel fumigants, emphasizing sustainability.

### Key Market Players

Corteva Agriscience, based in Wilmington, Delaware, USA, is a leader in soil fumigants, offering 1,3-Dichloropropene solutions for cereals, known for precision pest control.

AMVAC, headquartered in Newport Beach, California, USA, specializes in chloropicrin for vegetables, focusing on low-residue formulations.

FMC Corporation, from Philadelphia, Pennsylvania, USA, provides metam sodium solutions, emphasizing regulatory compliance.

BASF, based in Ludwigshafen, Germany, develops eco-friendly fumigants for cereals, known for sustainable innovations.

### Porter's Five Forces Analysis

The threat of new entrants is low; stringent regulations and high R&D costs deter entry.

The threat of substitutes is moderate; non-chemical pest control competes, but fumigants offer high efficacy.

Buyer power is moderate; farmers demand effective solutions, but large buyers negotiate pricing.

Supplier power is low; raw materials are widely available, reducing supplier leverage.

Competitive rivalry is high; companies differentiate through low-toxicity and sustainable formulations.

### Market Opportunities and Challenges

#### Opportunities

Growing pest resistance drives fumigant demand.

Reduced-risk and non-chemical fumigants enhance market growth.

Emerging markets in Asia Pacific offer expansion opportunities.

## Challenges

Stringent environmental regulations increase compliance costs.

Public concerns over chemical residues challenge market perception.

High costs limit adoption in small-scale farming.

## Growth Trend Analysis

The Soil Fumigant market is growing steadily, driven by pest control needs. On June 6, 2024, Imaflex Inc. received a U.S. patent for ADVASEAL®, a non-fumigant soil disinfestation material. On January 24, 2025, Corteva Agriscience launched Salibro®CA, a new nematicide for California crops. On March 26, 2025, California introduced a pesticide notification system, reflecting regulatory trends. On May 2, 2025, Dow sold its Telone™ soil fumigant business to TriCal Soil Solutions for \$121M, signaling market consolidation. These align with a projected CAGR of 4.5%–6.5% through 2030.

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