

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

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Abstracts

Tebufenozide Market Summary

Introduction

Tebufenozide is an insect growth regulator (IGR) used to control lepidopteran pests in vegetables, fruits, corn, rice, and other crops, available as liquid or powder formulations. The industry is characterized by its focus on selective pest control, low mammalian toxicity, and IPM compatibility, driven by demand for sustainable pest management. Trends include eco-friendly IGRs, precision application, and biodegradable formulations, with growth fueled by pest resistance and regulatory support.

Market Size and Growth Forecast

The global Tebufenozide market was valued at USD 106.3–154.6 million in 2024, with an estimated CAGR of 5.0%–7.0% from 2025 to 2030, driven by sustainable pest control needs.

Regional Analysis

North America grows at 4.8%–6.8%; the U.S. leads due to fruit farming, emphasizing IPM adoption.

Europe achieves 4.5%–6.5% growth; France drives demand, focusing on eco-friendly IGRs.

Asia Pacific records 5.5%–7.5% growth; China is a key market, with trends toward rice production.

Rest of the World grows at 4.3%–6.3%; Brazil shows potential, prioritizing vegetable pest control.

Application Analysis

Vegetables & Fruits expand at 5.2%–7.2%; they dominate pest control, with trends favoring selective IGRs.

Corn & Rice grow at 5.0%–7.0%; they support staple crops, emphasizing low-toxicity formulations.

Others rise at 4.8%–6.8%; they include field crops, focusing on biodegradable solutions.

Type Analysis

Liquid Tebufenozide expands at 5.2%–7.2%; it suits precision application, with trends favoring foliar sprays.

Powder Tebufenozide grows at 5.0%–7.0%; it supports storage stability, emphasizing cost-efficiency.

Key Market Players

Nippon Soda, based in Tokyo, Japan, is a leader in Tebufenozide, offering liquid formulations for vegetables. Its products are known for low toxicity and IPM compatibility.

Gowan Company, headquartered in Yuma, Arizona, USA, specializes in Tebufenozide for fruits, with a focus on eco-friendly solutions.

Jiangsu Baoling Chemical, from Yancheng, China, provides scalable Tebufenozide for rice, emphasizing precision application.

Shandong Luba Chemical, based in Jinan, China, produces cost-effective Tebufenozide for corn, focusing on biodegradable formulations.

Jingbo Agrochemicals, headquartered in Binzhou, China, offers high-performance Tebufenozide for vegetables, known for regulatory compliance.

Porter's Five Forces Analysis

The threat of new entrants is moderate; regulatory barriers deter entry, but demand attracts niche players.

The threat of substitutes is moderate; alternative IGRs compete, but Tebufenozide's selectivity is unique.

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

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

Competitive rivalry is high; companies differentiate through eco-friendly and biodegradable formulations.

Market Opportunities and Challenges

Opportunities

Growing pest resistance drives IGR demand.

Eco-friendly and IPM-compatible IGRs enhance market growth.

Emerging markets offer expansion as agriculture grows in Asia.

Challenges

Stringent regulations on pesticides increase compliance costs.

High costs limit adoption in small-scale farming.

Public scrutiny on chemical pesticides challenges market perception.

Growth Trend Analysis

The Tebufenozide market is growing steadily, driven by pest control needs. On May 22, 2024, the EU extended Tebufenozide's approval until January 31, 2027, boosting market confidence. Changshu Liling Fine Chemical Co., Ltd's Tebufenozide capacity is 100 tons/year, reflecting stable production. These developments align with a projected CAGR of 5.0%–7.0% through 2030, driven by sustainable pest management.

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