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Mycorrhizal Fungi Market Forecasts to 2034 – Global Analysis By Type (Endomycorrhiza, Arbuscular Mycorrhiza (AM), Ericoid Mycorrhiza, Orchid Mycorrhiza, Ectomycorrhiza, and Ectendomycorrhiza), Formulation, Mode of Application, Crop Type, End User, Distribution Channel, and By Geography

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Abstracts

According to Stratistics MRC, the Global Mycorrhizal Fungi Market is accounted for $2.9 billion in 2026 and is expected to reach $6.3 billion by 2034 growing at a CAGR of 10.3% during the forecast period. Mycorrhizal fungi form symbiotic associations with plant roots, enhancing nutrient uptake, water absorption, and soil health while reducing dependency on synthetic fertilizers. These beneficial microorganisms are increasingly adopted across agriculture, horticulture, and forestry sectors as sustainable alternatives for crop productivity enhancement. The market encompasses diverse fungal types and formulation formats tailored to various application methods, crop systems, and environmental conditions.

Market Dynamics:

Driver:

Growing demand for sustainable agricultural practices

The global shift toward regenerative agriculture and reduced chemical inputs is accelerating adoption of mycorrhizal fungi as biological solutions. Farmers facing soil degradation, rising fertilizer costs, and stricter environmental regulations increasingly turn to microbial inoculants for sustainable productivity gains. Mycorrhizal fungi improve

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soil structure, enhance nutrient cycling, and build crop resilience without environmental harm associated with synthetic alternatives. This alignment with sustainability mandates across both developed agricultural markets and emerging economies positions mycorrhizal products as essential tools for modern farming seeking balance between productivity and environmental stewardship.

Restraint:

Limited farmer awareness and technical knowledge

Widespread adoption remains constrained by insufficient understanding of mycorrhizal fungi benefits and application protocols among conventional farming communities. Many growers lack familiarity with biological inoculants, questioning efficacy compared to traditional fertilizers they have used for generations. Proper application timing, storage conditions, and compatibility with existing practices require technical knowledge not consistently available through standard agricultural extension services. This knowledge gap creates hesitation, particularly among smallholder farmers who dominate agricultural production in developing regions where yield margins are already narrow and experimentation risks appear unacceptable.

Opportunity:

Expansion into high-value specialty crop segments

Premium crop sectors including organic produce, wine grapes, and specialty horticulture present significant growth opportunities for mycorrhizal products. Growers in these segments command higher price points and demonstrate greater willingness to invest in biological inputs that enhance crop quality, flavor profiles, and marketable yields. Mycorrhizal fungi's proven benefits for fruit development, nutrient density, and stress tolerance align directly with quality premiums these producers pursue. Established distribution networks serving specialty agriculture provide efficient channels for product introduction, accelerating market penetration beyond traditional row crop applications.

Threat:

Competition from alternative biological products

The rapidly expanding biologicals market introduces competitive pressure from diverse microbial solutions targeting similar agricultural outcomes. Bacterial inoculants,

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biostimulants, and other fungal species compete for grower attention and field application budgets, creating crowded market conditions. Product differentiation becomes challenging as multiple biological options claim overlapping benefits. Consolidation among agricultural input companies concentrates distribution channels, potentially limiting shelf space for specialized mycorrhizal products. This competitive landscape pressures pricing and margins while requiring continuous investment in efficacy demonstration to justify premium positioning against alternative offerings.

Covid-19 Impact:

The pandemic initially disrupted mycorrhizal fungi supply chains through raw material sourcing challenges and agricultural distribution network interruptions. However, subsequent food security concerns elevated attention toward sustainable agricultural solutions that reduce dependency on imported synthetic inputs. Lockdown periods accelerated interest in local food production and regenerative farming methods, benefiting biological products. Digital platforms enabled continued farmer education and product access despite physical distribution constraints. These shifts toward resilient, self-sufficient agricultural systems created lasting demand tailwinds for mycorrhizal products in post-pandemic agricultural markets.

The Endomycorrhiza segment is expected to be the largest during the forecast period

The Endomycorrhiza segment is expected to account for the largest market share during the forecast period, driven by its broad compatibility with over eighty percent of terrestrial plant species including major row crops, vegetables, and fruit trees. These fungi penetrate root cells directly, forming extensive internal networks that dramatically enhance phosphorus uptake and water absorption. Their versatility across diverse agricultural applications, from corn and wheat to tomatoes and berries, makes them indispensable for growers seeking maximum return on biological investment. Established commercial production capabilities ensure reliable supply for large-scale agricultural operations.

The Liquid Formulation segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Liquid Formulation segment is predicted to witness the highest growth rate, reflecting grower preference for convenient, uniform application methods compatible with existing irrigation and spraying equipment. Liquid products integrate seamlessly into standard agricultural operations through drip irrigation

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systems, foliar applications, and seed treatment processes, eliminating additional equipment investments. Consistent product dispersion ensures reliable colonization results compared to solid formulations with variable distribution. The expanding adoption of precision agriculture technologies further accelerates liquid formulation preference as growers seek input efficiency and application accuracy across increasingly sophisticated farming operations.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share supported by advanced agricultural practices, strong organic farming adoption, and established biological product distribution networks. The region's large-scale row crop agriculture provides substantial addressable acreage for mycorrhizal applications across corn, soybean, and wheat production systems. Robust regulatory frameworks for biological inputs create market stability while consumer demand for sustainably produced food drives grower adoption. Major agricultural input companies headquartered in the region maintain extensive grower education programs that accelerate product acceptance across both conventional and organic farming segments.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, driven by massive agricultural production scales, deteriorating soil health conditions, and government sustainability initiatives. Countries including China, India, and Australia face severe soil degradation challenges requiring biological restoration solutions. Growing organic agriculture sectors and rising fertilizer costs create compelling economics for mycorrhizal adoption. Government programs promoting sustainable farming practices and reducing chemical input dependency accelerates market development. Expanding distribution networks and increasing technical support availability make biological products accessible to the region's large farming populations, fueling rapid adoption growth.

Key players in the market

Some of the key players in Mycorrhizal Fungi Market include Koppert Biological Systems, Novonesis Group, Atl?ntica Agricola, Biolchim S.p.A., Gujarat State Fertilizers & Chemicals Limited, Valent BioSciences, Mycorrhizal Applications LLC, Groundwork BioAg Ltd, Reforestation Technologies International, BASF SE, Bayer AG, Syngenta AG, UPL Limited, Biostadt India Limited, and Lallemand Plant Care.

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Key Developments:

In October 2025, Valent BioSciences, MGK, and Valent North America announced they will merge into a single entity, Sumitomo Biorational Company LLC (SBC), effective April 2026. This reorganization establishes a Global Center of Excellence for Biorational Innovation, focusing on integrating mycorrhizal fungi and other microbials into regenerative agriculture portfolios.

In September 2025, Groundwork BioAg announced a strategic partnership with Beck's to launch the first commercial insetting deployment of durable carbon removal. The program makes Rootella® mycorrhizal inoculants available to U.S. growers, allowing them to earn premiums by sequestering carbon for grain buyers like Suntory.

In May 2025, Biolchim released technical results for VHERA® MB, a concentrated microbial consortium containing arbuscular mycorrhizal fungi and Trichoderma. Trials on strawberries showed a 10% increase in productivity and significant restoration of 'fatigued' soils.

Types Covered:

- Endomycorrhiza
- Arbuscular Mycorrhiza (AM)
- Ericoid Mycorrhiza
- Orchid Mycorrhiza
- Ectomycorrhiza
- Ectendomycorrhiza

Formulations Covered:

- Liquid Formulation
- Solid Formulation

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Powder

Granular

Pellet

Mode of Applications Covered:

Seed Treatment

Soil Application

Root Dipping

Fertigation / Drip Irrigation

Foliar Application

Crop Types Covered:

Cereals & Grains

Oilseeds & Pulses

Fruits & Vegetables

Turf & Ornamentals

Plantation Crops

Forestry Crops

End Users Covered:

Agriculture

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- Horticulture
- Forestry
- Landscaping & Turf Management
- Research Institutes & Universities

Distribution Channels Covered:

- Direct Sales
- Agricultural Cooperatives
- Agrochemical Retailers
- Online Sales

Regions Covered:

- North America
  - United States
  - Canada
  - Mexico
- Europe
  - United Kingdom
  - Germany
  - France

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- Italy
- Spain
- Netherlands
- Belgium
- Sweden
- Switzerland
- Poland
- Rest of Europe

Asia Pacific

- China
- Japan
- India
- South Korea
- Australia
- Indonesia
- Thailand
- Malaysia
- Singapore
- Vietnam
- Rest of Asia Pacific

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South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

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What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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14 COMPANY PROFILES

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Note: Tables for North America, Europe, APAC, South America, and Rest of the World (RoW) Regions are also represented in the same manner as above.

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