

# Post-Harvest Treatment Market Forecasts to 2032 – Global Analysis By Type (Coatings, Cleaners, Fungicides and Other Types), Crop Type, Origin, Application and By Geography

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## Abstracts

According to Statistics MRC, the Global Post-Harvest Treatment Market is accounted for \$2.40 billion in 2025 and is expected to reach \$4.47 billion by 2032 growing at a CAGR of 9.3% during the forecast period. The term 'post-harvest treatment' describes the range of procedures used on agricultural products to preserve quality, increase shelf life, and lower losses following harvest. Cleaning, sorting, grading, drying, chilling, and chemical applications including ripening agents, wax coatings, and fungicides are some of these processes. Additionally, methods including cold storage, controlled environment packing, and irradiation aid in maintaining freshness and avoiding spoiling. Maintaining food safety, improving marketability, and making sure that product reaches customers in the best possible condition all depend on efficient post-harvest procedures.

Market Dynamics:

Driver:

Growing organic and sustainable farming trends

Natural and environmentally friendly post-harvest solutions are becoming more and more in demand since organic fruit is more prone to spoiling. To preserve quality and increase shelf life, biodegradable coatings, bio-based fungicides, and environmentally friendly storage options are becoming more and more popular. To cut down on food wastage and satisfy strict organic certification requirements, farmers and food suppliers

are investing in cutting-edge post-harvest technologies. Additionally, producers are being pressured to create safer treatment options due to customer preferences for fresh, chemical-free products.

#### Restraint:

##### High cost of advanced post-harvest technologies

Large initial investments are necessary for costly equipment, such as automated sorting, packing, and cold storage systems. Due to financial constraints, many farmers and agribusinesses turn to antiquated practices that lower quality and shorten shelf life. Widespread adoption is further discouraged by high operating and maintenance expenses. Stakeholders find it challenging to obtain contemporary solutions due to a lack of subsidies and limited financial assistance. Consequently, the benefits of increased efficiency and decreased post-harvest losses are limited when market expansion slows.

#### Opportunity:

##### Rising demand for natural and bio-based treatments

Customers like product that is chemical-free and organic, which motivates farmers to use environmentally beneficial practices. Bio-based treatments successfully increase shelf life, lower chemical residues, and improve food safety. The transition to natural alternatives is further aided by strict limits on synthetic chemicals. Market prospects are growing as a result of advancements in microbial solutions, essential oils, and biological coatings, the use of bio-based post-harvest treatments is increasing as sustainability concerns rise.

#### Threat:

##### Competition from traditional storage and handling methods

The necessity for sophisticated treatments is decreased by the widespread use of traditional methods by farmers, particularly in developing nations, such as open-air drying and simple storage. Because they frequently demand less capital, traditional methods are more affordable for small-scale manufacturers. The adoption of contemporary post-harvest remedies is also slowed by ignorance and reluctance to change. New technologies face a barrier to entrance due to established supply

channels for traditional storage. Consequently, getting broad acceptability is a major obstacle to the post-harvest treatment market's expansion.

### Covid-19 Impact

The COVID-19 pandemic disrupted the post-harvest treatment market due to supply chain disruptions, labor shortages, and transportation restrictions. Lockdowns hindered the availability of raw materials and delayed product deliveries, impacting treatment processes. Reduced demand from the foodservice sector affected sales, while increased consumer preference for fresh and packaged food drove market recovery. Innovations in post-harvest technologies, including smart storage and biological treatments, gained traction. The market gradually rebounded as economies reopened and agricultural activities normalized, ensuring food security and sustainability.

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

The sanitizers segment is expected to account for the largest market share during the forecast period by ensuring food safety and extending the shelf life of produce. Increasing concerns over microbial contamination and stringent food safety regulations fuel demand for effective sanitizing solutions. The rising adoption of organic and eco-friendly sanitizers further accelerates market growth. Technological advancements in post-harvest sanitation enhance efficiency and reduce post-harvest losses. Growing consumer awareness about food hygiene strengthens the role of sanitizers in the market.

The packhouse treatment segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the packhouse treatment segment is predicted to witness the highest growth rate, due to the quality and longevity of produce before distribution. It includes processes like cleaning and coating, which enhance shelf life and reduce post-harvest losses. Advanced technologies such as automated sorting and chemical treatments improve efficiency and compliance with global food safety standards. Rising demand for fresh and export-quality produce further boosts the need for packhouse treatments. As consumer awareness of food quality grows, packhouse solutions play a crucial role in maintaining supply chain integrity and minimizing waste.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to increasing agricultural production and the need to reduce food losses. Countries like China, India, and Japan are investing in advanced post-harvest technologies, including coatings, fumigants, and biological treatments. Rising consumer demand for fresh and high-quality produce is driving the adoption of innovative preservation methods. Government initiatives and subsidies for cold storage and logistics infrastructure are further supporting market expansion. The presence of major agribusiness players and technology providers is enhancing the region's post-harvest management capabilities.

#### Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, owing to increasing demand for fresh and high-quality produce. Rising awareness about food wastage and the need for longer shelf life are driving the adoption of advanced post-harvest solutions. The market is fuelled by innovations in coatings, fungicides, and bio-based preservatives to maintain freshness. The U.S. dominates the region, with Canada also expanding its agricultural preservation techniques. Stringent food safety regulations and sustainability trends are further shaping the industry's evolution.

#### Key players in the market

Some of the key players profiled in the Post-Harvest Treatment Market include Pace International, DECCO #- #UPL, JBT Corporation, Syngenta, DowDupont, Xeda International, Colin Campbell Chemicals Pty Ltd, AgroFresh, FMC Corporation, Nufarm, Bayer, Fomesa Fruitech, Janssen Pharmaceutica NV, Futureco Bioscience S.A., Post-Harvest Solution Ltd, Citrosol, Corteva Agriscience and Apeel Sciences.

#### Key Developments:

In June, 2024 JBT announced its intention to pursue a merger with Marel hf., a leading provider of advanced processing systems and services to the food industry. The proposed merger aims to create a global leader in food processing technology, enhancing JBT's capabilities in the post-harvest treatment market.

In March 2024, Pace International acquired AgroFresh Solutions, Inc., including its domestic and international operations. This acquisition expanded AgroFresh's presence in key fruit-growing regions across North and South America, enabling the company to

offer a broader portfolio of quality and freshness solutions for perishable crops.

In January 2022, DECCO launched Decco DMN Aerosol, an EPA-registered product designed to protect stored potatoes by reducing sprouting and disease issues. This product enhances flesh strength, color, and reduces bruising during storage.

#### Types Covered:

Coatings

Cleaners

Fungicides

Ethylene Blockers

Sprout Inhibitors

Sanitizers

Disinfectants

Other Types

#### Crop Types Covered:

Fruits

Vegetables

Flowers & Ornamental Plants

Cereals & Grains

Other Crop Types

#### Origins Covered:

Synthetic

Biological

Applications Covered:

Fruits & Vegetables Storage

Packhouse Treatment

Retail Processing

Transportation & Export

Other Applications

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

## Rest of Middle East & Africa

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 2024, 2025, 2026, 2028, and 2032
- 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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