

# **Glyphosate Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Conventional Crops, GM Crops), By Application (Grains and Cereals, Pulses and Oilseeds, Fruits and Vegetables, Commercial Crops, Other Crop Types) Region and Competition**

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## **Abstracts**

Global Glyphosate Market has valued at USD 8.12 billion in 2022 and is anticipated to project robust growth in the forecast period with a CAGR of 6.82% through 2028.

Glyphosate is a widely used herbicide known for its effectiveness in controlling a broad spectrum of weeds, making it a crucial tool in modern agriculture. Its popularity can be attributed to its versatility, cost-effectiveness, and relatively low environmental impact when compared to some alternative herbicides. As of my last knowledge update in September 2021, I can provide insights into the state of the glyphosate market up to that point.

One of the primary drivers of the global glyphosate market has been the expansion of agricultural activities, particularly in emerging economies. Increased demand for food due to growing populations has prompted farmers to adopt glyphosate-based herbicides to enhance crop yields and reduce weed-related losses. Additionally, the adoption of genetically modified (GM) crops, such as Roundup Ready varieties, which are engineered to be glyphosate-tolerant, has further boosted glyphosate usage.

However, the glyphosate market has faced challenges, notably concerning concerns about its environmental and health impacts. Regulatory scrutiny and legal battles, particularly in the United States, have put pressure on glyphosate manufacturers. Concerns about glyphosate's potential links to cancer have led to bans and restrictions

in some regions. These factors have introduced an element of uncertainty into the market's future.

## Key Market Drivers

### Rising Global Population and Food Demand

The rising global population and escalating food demand have emerged as a driving force behind the robust growth of the global glyphosate market. With the world's rising population, the pressure on agriculture to produce more food is greater than ever before. In this context, glyphosate, a highly effective herbicide, plays a pivotal role in increasing agricultural productivity.

As the global population continues to swell, the demand for food surges in tandem. Meeting this demand necessitates optimizing crop yields and ensuring that arable land is used to its full potential. Glyphosate has proven to be a critical tool in achieving this goal. By effectively eliminating weeds that compete with crops for nutrients, water, and sunlight, glyphosate helps farmers maximize their yields. This, in turn, contributes to food security by ensuring a stable and ample food supply.

Moreover, glyphosate facilitates sustainable farming practices by reducing the need for extensive land clearing. With urbanization encroaching on agricultural land, there is a growing emphasis on intensifying agricultural production on existing farmland. Glyphosate enables farmers to practice no-till or reduced-till agriculture, where the soil remains largely undisturbed between planting seasons. This conserves soil, reduces erosion, and minimizes the environmental impact of agriculture, aligning with the principles of sustainable farming.

The adoption of glyphosate-based herbicides is particularly pronounced in regions where the population growth rate is high and food security is a pressing concern. In developing economies, where agriculture is a significant contributor to GDP and employment, glyphosate has played a pivotal role in transforming traditional farming practices into more efficient and productive systems. As a result, farmers in these regions have been able to increase their crop yields and improve their livelihoods.

### Adoption of Genetically Modified (GM) Crops

The adoption of genetically modified (GM) crops has been a pivotal factor driving the growth of the global glyphosate market. GM crops, particularly those engineered to be

glyphosate-tolerant, have revolutionized modern agriculture by offering a targeted and efficient solution for weed control. These crops are genetically engineered to withstand glyphosate application, allowing farmers to use glyphosate-based herbicides to control weeds without harming their crops. This innovation simplifies farming operations and enhances crop yields.

One of the primary advantages of GM crops is their compatibility with glyphosate-based herbicides, such as Monsanto's Roundup. Farmers can apply glyphosate to their fields, effectively eliminating weeds that compete with crops for resources like water, nutrients, and sunlight. This selective herbicide action reduces the need for labor-intensive and less precise weed control methods, such as manual weeding or the use of alternative, potentially more harmful herbicides.

The adoption of GM crops has been particularly significant in major agricultural regions like North America and South America. In the United States, for example, glyphosate-tolerant soybeans, corn, and cotton have become staple crops. Farmers in these regions have embraced technology for its efficiency and cost-effectiveness. As a result, the demand for glyphosate has soared in tandem with the adoption of GM crops.

Additionally, GM crops offer environmental benefits. Glyphosate-tolerant crops enable farmers to practice reduced-tillage or no-tillage farming, where the soil is disturbed minimally or not at all between planting seasons. This conservation tillage approach prevents soil erosion, reduces greenhouse gas emissions, and conserves water, contributing to more sustainable farming practices.

### Ease of Use and Cost-Effectiveness

The ease of use and cost-effectiveness of glyphosate-based herbicides have played a pivotal role in propelling the global glyphosate market to its prominent position in modern agriculture. Its straightforward application and minimal training requirements make it accessible to both seasoned agricultural professionals and new farmers. The herbicide is typically available in easy-to-handle formulations, making it a practical option for a wide range of farming operations. This simplicity of use significantly reduces the learning curve associated with weed control, enabling farmers to efficiently manage their fields.

Furthermore, glyphosate-based herbicides are renowned for their cost-effectiveness. As the agricultural sector faces mounting economic pressures, farmers are constantly seeking ways to optimize their production while minimizing costs. Glyphosate offers an

attractive solution due to its affordability compared to many alternative herbicides. The lower cost of glyphosate-based herbicides makes them a cost-efficient choice, particularly for large-scale farming operations where economies of scale come into play. This affordability enables farmers to allocate their resources more effectively, potentially leading to improved profitability.

Another aspect contributing to the cost-effectiveness of glyphosate is its versatility. Glyphosate can control a broad spectrum of weeds, including both broadleaf and grassy weeds. This versatility means that a single herbicide can be used to manage various weed species, reducing the need for multiple products and applications. Simplifying weed control in this manner not only saves time and labor but also reduces the overall cost of weed management for farmers. The ease of use and cost-effectiveness of glyphosate-based herbicides have been key drivers in boosting the global glyphosate market. Farmers appreciate glyphosate's simplicity, as it requires minimal training and offers practical formulations for application. Moreover, the cost-efficiency of glyphosate-based herbicides makes them an appealing choice for a wide range of agricultural operations, contributing to their widespread adoption.

## Key Market Challenges

### Regulatory Scrutiny and Restrictions

The global glyphosate market, a cornerstone of modern agriculture, has faced a formidable obstacle in the form of heightened regulatory scrutiny and restrictions imposed by various countries and regions. Glyphosate, a widely used herbicide known for its efficacy in weed control, has become a contentious subject due to concerns about its potential health and environmental impacts. This scrutiny and the resulting restrictions have created substantial challenges for the glyphosate market.

Glyphosate has been at the center of high-profile lawsuits alleging a link between its use and cancer, particularly non-Hodgkin's lymphoma. These legal cases have resulted in significant financial settlements, damaging the reputation of glyphosate manufacturers, most notably Bayer, which acquired Monsanto, the original manufacturer of glyphosate-based herbicides. These legal disputes have not only led to financial burdens but have also cast a cloud of uncertainty over the glyphosate market.

Furthermore, Europe has been a hotspot for regulatory challenges to glyphosate. The European Union (EU) has faced debates and disagreements over the reapproval of glyphosate, leading to temporary extensions and extensive debates within the EU

institutions. This uncertainty has complicated the market for glyphosate-based products in Europe, creating volatility and affecting product availability and usage.

## Emergence of Herbicide-Resistant Weeds

The global glyphosate market has long been a cornerstone of modern agriculture due to its effectiveness in weed control. However, one of the most pressing challenges it faces today is the emergence of herbicide-resistant weeds, a phenomenon that threatens the sustainability of glyphosate-based weed control strategies.

Over the years, glyphosate has been widely adopted and heavily relied upon for weed control in various crops, including soybeans, corn, cotton, and more. The ease of use and cost-effectiveness of glyphosate-based herbicides made them a go-to solution for many farmers. However, this overreliance has created an environment in which weeds are exposed repeatedly to glyphosate, increasing the likelihood of resistance development.

The repeated use of glyphosate creates a strong selective pressure on weed populations. When glyphosate is applied consistently, it kills susceptible weeds while allowing a small portion of the weed population with inherent resistance to survive. These resistant weeds then reproduce, passing on their resistance traits to the next generation. Over time, this process results in a shift in weed populations toward resistant biotypes.

Herbicide-resistant weeds are not limited to a single resistance mechanism. Some weeds develop resistance to glyphosate through multiple mechanisms, making them even harder to control. This multi-resistance trait further complicates weed management strategies and necessitates the use of alternative herbicides, which can be costlier and less environmentally friendly.

As herbicide-resistant weeds become more prevalent, farmers must invest in alternative weed control methods, such as mechanical cultivation or the use of other herbicides. These alternatives often require more labor and resources, leading to increased production costs. The added expenses associated with herbicide-resistant weeds can significantly impact a farm's profitability.

## Key Market Trends

### Technological Advancements and Formulation Innovations

Technological advancements and formulation innovations have played a pivotal role in boosting the global glyphosate market. Glyphosate, a widely used herbicide renowned for its effectiveness in weed control, has evolved and improved through innovative approaches, contributing to its continued relevance in modern agriculture.

One of the key technological advancements is the development of more precise application methods. Farmers can now utilize advanced equipment and GPS technology to apply glyphosate with pinpoint accuracy. This precision minimizes wastage, reduces environmental impact, and ensures that glyphosate is used efficiently and effectively.

Formulation innovations have also been instrumental in shaping the glyphosate market. Manufacturers have been focused on enhancing glyphosate-based herbicides to improve their performance and safety profiles. Low-dosage formulations have gained popularity, allowing farmers to achieve effective weed control with smaller amounts of glyphosate. These formulations not only reduce environmental exposure but also contribute to cost savings.

Furthermore, glyphosate formulations have been adapted to suit various application methods, including aerial spraying and no-till farming practices. This adaptability enhances the versatility of glyphosate, making it suitable for different crops and farming systems. In response to environmental concerns, manufacturers have developed glyphosate formulations that are less harmful to non-target organisms and ecosystems. These innovations aim to strike a balance between weed control efficacy and environmental stewardship, addressing the sustainability demands of modern agriculture.

Additionally, some formulations incorporate adjuvants that improve glyphosate's performance. These adjuvants can enhance herbicide penetration and adherence to weed surfaces, ensuring more effective weed control and reducing the risk of resistance development. Technological advancements and formulation innovations have propelled the global glyphosate market forward by making the herbicide more efficient, precise, and environmentally friendly. These developments have not only met the demands of modern farming practices but have also positioned glyphosate as a key tool in sustainable agriculture.

## Integration of Precision Agriculture

The integration of precision agriculture practices has significantly boosted the global glyphosate market, positioning glyphosate as a critical tool for modern farming. Precision agriculture, driven by advancements in technology and data analytics, has revolutionized the way farmers manage their fields, optimize resources, and enhance crop productivity.

Advanced equipment, including GPS-guided tractors and drones, enables farmers to apply glyphosate with unprecedented accuracy. This precision ensures that glyphosate is applied only where it is needed, reducing overuse and minimizing its environmental impact. Farmers can create precise application maps, taking into account factors such as weed distribution, soil conditions, and crop growth stages, allowing them to tailor glyphosate treatments for optimal results.

The result of this precision is not only improved weed control but also cost savings for farmers. By using glyphosate more efficiently and sparingly, farmers reduce their input costs, contributing to higher profitability. Additionally, precise application reduces the risk of glyphosate residues in soil and water, addressing environmental concerns and promoting sustainability.

Moreover, precision agriculture has facilitated the integration of glyphosate into variable rate technology (VRT) systems. VRT allows farmers to adjust glyphosate application rates in real-time based on field conditions and data inputs, further enhancing efficiency and weed control effectiveness. This adaptability is crucial in addressing the dynamic nature of weed infestations and ensures that glyphosate remains a valuable asset in weed management.

Furthermore, the data-driven approach of precision agriculture enables farmers to monitor the efficacy of glyphosate applications over time. By analyzing data on weed populations, herbicide resistance, and treatment outcomes, farmers can make informed decisions about glyphosate usage, helping to prevent the development of herbicide-resistant weeds.

## Segmental Insights

### Type Insights

Based on the Type, genetically modified (GM) crops emerged as the dominant segment in the global market for Global Glyphosate Market in 2022. GM crops, specifically those engineered to be glyphosate-tolerant, have been developed to withstand glyphosate

application. This innovation allows farmers to use glyphosate-based herbicides like Roundup without harming their crops. This unique advantage simplifies weed control efforts, reducing the need for alternative herbicides or labor-intensive weeding practices. As a result, farmers have gravitated toward glyphosate-tolerant GM crops to streamline their operations and maximize yields.

GM crops, in conjunction with glyphosate, facilitate streamlined and efficient farming practices. The combination of these technologies supports practices like no-till and reduced-tillage farming, which conserve soil, reduce erosion, and improve soil health. These practices align with sustainability goals while maintaining high agricultural productivity.

### Application Insights

Based on the Application, the Commercial Crops segment emerged as the dominant player in the global market for Global Glyphosate Market in 2022. Commercial crops, such as cotton, soybeans, and corn, are typically grown on a large scale. They are integral to the agricultural economy and are major contributors to global food and fiber production. The sheer volume of commercial crop cultivation results in a substantial demand for herbicides like glyphosate to manage weed infestations efficiently.

Glyphosate is highly effective at controlling a broad spectrum of weeds, which is crucial in commercial crop production. Weeds can compete with commercial crops for essential resources like water, nutrients, and sunlight, leading to reduced yields. Glyphosate's ability to efficiently eliminate weeds helps farmers maximize their crop yields, ensuring a stable and ample food and fiber supply.

### Regional Insights

Asia-pacific emerged as the dominant player in the global Glyphosate Market in 2022, holding the largest market share. Asia-Pacific is home to some of the world's most populous countries, including China and India. As the population continues to grow, so does the demand for food and agricultural products. To meet this demand, there has been a significant expansion of agricultural land and the adoption of modern farming practices. Glyphosate, with its effectiveness in weed control, has become a crucial tool in optimizing crop yields across the region.

As Asia-Pacific countries undergo rapid industrialization and urbanization, agricultural land is often converted for non-agricultural purposes. This shrinking arable land



necessitates higher agricultural productivity from the available land, making glyphosate an attractive choice for weed control and maximizing yields in limited spaces.

### Key Market Players

Adama Agricultural Solutions Ltd

BASF SE

Bayer Cropscience AG

UPL Limited

FMC Corporation

Zhejiang Xinan Chemical Industrial Group Company Ltd

Nufarm Limited

DuPont

Syngenta International

Dow AgroSciences

### Report Scope:

In this report, the Global Glyphosate Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Global Glyphosate Market, By Type:

Conventional Crops

GM Crops

Global Glyphosate Market, By Application:

Grains and Cereals

Pulses and Oilseeds

Fruits and Vegetables

Commercial Crops

Other Crop Types

Global Glyphosate Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Kuwait

Turkey

Egypt

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Glyphosate Market.

## Available Customizations:

Global Glyphosate Market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

## Company Information

*Glyphosate Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Typ...*

Detailed analysis and profiling of additional market players (up to five).

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