

# **Post-Harvesting Treatment Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Coating, Ethylene Blockers, Cleaners, Fungicides, Sprout Inhibitors, Sanitizers, Other), By Crop Type (Fruits, Vegetables, Flowers & Ornamentals), By Origin (Natural, Synthetic), By Region and Competition, 2020-2030F**

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## **Abstracts**

Global Post-Harvesting Treatment Market was valued at USD 1.34 Billion in 2024 and is expected to reach USD 2.08 Billion in the forecast period with a CAGR of 7.54% through 2030. The post-harvesting treatment market is crucial for ensuring the quality and shelf life of harvested crops. Post-harvest treatments include various processes such as cleaning, sorting, waxing, and storing crops under optimal conditions. These treatments are designed to reduce spoilage, maintain freshness, and prevent pest and disease damage. The growing demand for high-quality, fresh produce, combined with the rising global population, drives the need for more efficient post-harvest solutions. Innovations in technology, such as controlled atmosphere storage and refrigeration, play a pivotal role in extending the shelf life of fruits and vegetables, which is vital for reducing food waste and meeting the needs of the food industry.

A significant driver of growth in the post-harvest treatment market is the increasing focus on reducing food waste. As populations grow and agricultural production struggles to meet demand, the need for preserving harvested produce becomes more pronounced. Treatments like fungicide application, modified atmosphere packaging, and ethylene management solutions are widely adopted in both small-scale and large-scale agricultural practices. These solutions help prevent premature ripening, control diseases, and maintain the nutritional value of produce. Along with this, consumers are

more inclined to purchase fresh produce with extended shelf life, supporting market growth.

Despite its potential, the market faces several challenges. The high cost of advanced technologies and post-harvest treatments remains a barrier for small-scale farmers, limiting access to these solutions. Environmental concerns also impact the widespread adoption of chemical treatments, as there is an increasing preference for organic and sustainable methods. As regulations around food safety and environmental impact become stricter, the market must adapt by innovating more eco-friendly and cost-effective solutions. Manufacturers are focusing on sustainable treatment options, like natural preservatives, to meet consumer demand for cleaner and more environmentally responsible food production.

## Key Market Drivers

### Increasing Global Population and Food Demand

The increasing global population is a primary driver for the post-harvest treatment market, as it directly impacts the demand for food resources. As of mid-November 2022, the global population reached 8.0 billion, with projections indicating it will increase to 8.5 billion by 2030 and 9.7 billion by 2050. This significant rise in population directly correlates with a heightened demand for food resources. To meet this demand, there is an imperative need for robust and efficient post-harvest treatment infrastructures to preserve the quality and extend the shelf life of harvested crops. Post-harvest treatments are essential in minimizing food waste by preventing spoilage, extending shelf life, and preserving the nutritional value of harvested crops. These treatments encompass a variety of techniques, including storage optimization, temperature control, packaging solutions, and the application of preservatives to maintain the quality of fruits, vegetables, and grains during transportation and storage.

The heightened demand for fresh and nutritious produce driven by a larger consumer base also necessitates the adoption of advanced post-harvest technologies. Efficient post-harvest treatments help in reducing losses, ensuring that more harvested food reaches the market in optimal condition. As global trade in agricultural products increases, post-harvest solutions become even more critical to maintaining product integrity across long supply chains. These treatments not only cater to growing local markets but also enable agricultural products to meet international standards for quality and safety. Investments in technologies such as ethylene management, controlled atmosphere storage, and non-chemical preservatives are driven by the need to adapt to

evolving consumer expectations for sustainability and quality. The continuous rise in food demand, combined with advancements in post-harvest treatment technologies, positions this sector for substantial growth as the global population continues to grow.

### Advancements in Post-Harvest Technologies

Advancements in post-harvest technologies have become a crucial market driver for the post-harvest treatment sector. With increasing demands for fresh produce and the need to minimize food waste, the development of more efficient and sustainable technologies has led to significant growth in the market. Technologies like controlled atmosphere storage, modified atmosphere packaging, and temperature management solutions have revolutionized the way agricultural products are stored and transported. These innovations help maintain the quality of produce by slowing down the natural ripening process and preventing spoilage during transit. The shift towards non-chemical, environmentally friendly preservation methods, such as bio-based preservatives and natural coatings, also reflects the growing consumer demand for organic and sustainable food products.

The application of smart technologies, including IoT-based monitoring systems and automation in sorting and packaging, has improved the efficiency of post-harvest processes. These innovations allow farmers and producers to better manage storage conditions, monitor temperature and humidity levels, and track the freshness of produce in real-time. This helps reduce post-harvest losses and ensures that the product remains in optimal condition until it reaches consumers. Investments in research and development have led to the creation of more precise post-harvest treatments, such as the use of ethylene inhibitors to control ripening and the development of smart packaging that signals when the food is nearing the end of its shelf life.

The growing focus on sustainability and environmental impact has also driven the adoption of these advanced technologies. With stricter regulations regarding the use of chemicals in food preservation, companies are increasingly turning to green technologies to meet market and regulatory demands. This shift not only helps in reducing the carbon footprint but also opens up new opportunities for market growth, particularly in regions where environmentally conscious consumers drive demand for sustainable food practices.

### Globalization of Food Supply Chains

The globalization of food supply chains has become a significant driver for the post-

harvest treatment market, directly impacting how agricultural products are transported, stored, and consumed worldwide. As international trade in food products expands, the need for post-harvest technologies and treatments has grown to ensure that agricultural products maintain their quality and safety across long distances and varying climates. Efficient post-harvest treatment solutions, such as controlled atmosphere storage, refrigeration, and ethylene management, are critical for preserving the freshness of produce as it moves from farm to table, often spanning multiple countries and continents. These solutions help prevent spoilage, reduce food waste, and maintain the nutritional value of crops during transit, which is vital for meeting the demands of a global consumer base.

The increasing interconnectedness of global markets also requires products to meet international standards for quality, safety, and sustainability. Consumers worldwide expect fresh, high-quality produce regardless of its origin, prompting stakeholders in the food supply chain to invest in advanced post-harvest treatments. The use of modern packaging solutions, such as modified atmosphere packaging and active packaging systems, enables producers to extend the shelf life of fresh produce while ensuring it remains appealing to consumers. As international shipping and logistics networks continue to evolve, these innovations are becoming more crucial to maintain the integrity of perishable goods.

The rise in demand for year-round access to diverse food products has also contributed to the expansion of global food supply chains. Post-harvest treatments play an essential role in ensuring that seasonal produce is available in markets throughout the year without compromising on quality. As global food trade increases, advanced post-harvest solutions are integral to the smooth and efficient movement of agricultural products across borders. In 2022, the value of global food (excluding fish) exports reached USD 1.9 trillion, nearly five times higher than in 2000, highlighting the significant growth in international food trade. This expansion underscores the critical role of post-harvest treatments in maintaining the quality and safety of food products as they traverse complex global supply chains.

## Key Market Challenges

### Regulatory Compliance and Harmonization

Regulatory compliance and harmonization present significant challenges in the post-harvest treatment market, as various countries and regions have different standards and regulations regarding the use of post-harvest technologies. These regulations

govern the application of chemicals, preservatives, and treatment methods, and often vary widely between markets. For instance, while certain chemical treatments may be approved for use in one country, they might be restricted or banned in another. This lack of consistency across borders creates complexity for global trade, as exporters must ensure their products comply with the specific requirements of each market they enter. The variation in regulations also increases the cost and time required for companies to navigate these standards and ensure their products are legally acceptable in different regions.

Harmonizing regulations across countries remains a significant hurdle. Despite efforts by international organizations, such as the World Trade Organization (WTO), to create more consistent standards, discrepancies still exist. For example, the European Union (EU) has established specific regulations for organic farming, with the total area under organic farming in the EU reaching 16.9 million hectares in 2022, accounting for 10.5% of the total utilized agricultural area. In contrast, the United States has its own set of standards and regulations for organic products, leading to challenges in aligning these frameworks. These discrepancies can limit the ability of companies to scale their solutions globally, as they must adapt their products to meet diverse regulatory environments.

Additionally, the growing emphasis on organic and environmentally friendly farming practices poses challenges for traditional post-harvest treatments, especially those relying on synthetic chemicals. Increasing consumer demand for sustainable and non-toxic solutions pushes companies to develop new treatments that comply with increasingly stringent regulations while still being effective in preserving food. As regulatory frameworks evolve, businesses must invest heavily in research and development to meet compliance requirements while maintaining efficiency and product quality. For instance, the EU's action plan aims to increase the share of organic farming to at least 25% of the EU's agricultural land by 2030, highlighting the need for post-harvest treatments that align with organic standards.

## Consumer Perception and Acceptance

Consumer perception and acceptance present significant challenges in the post-harvest treatment market, as many consumers remain concerned about the safety and environmental impact of various preservation methods. With rising awareness about food safety, sustainability, and health, many consumers are wary of chemical treatments used to extend the shelf life of produce. This is particularly true for synthetic preservatives and treatments that are commonly associated with conventional farming

practices. The increasing demand for organic products, which are perceived as healthier and more environmentally friendly, exacerbates these concerns. As a result, consumers may be reluctant to purchase produce that has been treated with chemicals, even if these treatments are approved by regulatory authorities for safety and effectiveness.

The growing interest in clean-label products, which emphasize minimal use of additives and preservatives, also poses a challenge for the post-harvest treatment market. Many consumers are actively seeking products that are free from artificial chemicals and prefer items with fewer ingredients on the label. This has led to increased demand for natural and organic post-harvest treatments, such as bio-based preservatives and coatings, which are perceived as safer alternatives. However, these natural alternatives often come with higher costs, limiting their widespread adoption and creating a barrier for companies trying to cater to both quality and sustainability demands.

The reluctance to accept certain post-harvest treatments may also be linked to a lack of understanding of their benefits. Many consumers are unaware that such treatments play a crucial role in reducing food waste, preserving nutritional value, and maintaining the availability of fresh produce year-round. To address this challenge, education and awareness campaigns are vital in helping consumers understand the importance of post-harvest treatments and their positive impact on food security and sustainability. Companies must balance the need for effective preservation methods with consumer demands for transparency and natural ingredients.

In the United States, organic food sales have experienced significant growth, reflecting a shift in consumer preferences toward organic products. In 2021, organic retail sales were estimated to be more than USD 52 billion, accounting for about 5.5% of all retail food sales. This trend indicates a growing consumer demand for organic and minimally processed foods, which often do not undergo traditional post-harvest treatments. Consequently, the post-harvest treatment market faces the challenge of developing and promoting preservation methods that align with consumer preferences for organic and clean-label products.

The U.S. Food and Drug Administration (FDA) plays a crucial role in regulating food additives and preservatives to ensure consumer safety. The FDA evaluates and regulates ingredients added to food to help ensure they are used safely. While the FDA ensures the safety of approved additives, consumer perception of these substances can still be influenced by factors such as media reports and public opinion. Therefore, the post-harvest treatment market must navigate both regulatory standards and consumer



perceptions to effectively meet market demands.

## Key Market Trends

### Integration of Digital Technologies and Data Analytics

The integration of digital technologies and data analytics is becoming a key trend in the post-harvest treatment market as the demand for more efficient, precise, and sustainable solutions increases. Digital tools, such as Internet of Things (IoT) devices, sensors, and real-time monitoring systems, are transforming how post-harvest treatments are applied. These technologies allow for more accurate tracking of environmental factors such as temperature, humidity, and ethylene gas levels during storage and transport. This real-time data enables stakeholders to adjust conditions instantly to maintain optimal freshness and quality, ultimately reducing waste and preserving the nutritional value of produce. The use of IoT-based devices allows for better management of storage facilities, ensuring that produce remains in ideal conditions, while minimizing energy consumption and optimizing shelf life.

Data analytics plays a significant role in processing and interpreting the vast amounts of data generated by these digital tools. Through advanced analytics, farmers and supply chain managers can gain deeper insights into trends, patterns, and inefficiencies in the post-harvest process. Predictive analytics, for instance, can forecast potential issues like spoilage or pest infestations based on environmental conditions, allowing for preemptive actions. This level of foresight can help reduce losses and enhance the overall efficiency of the food supply chain. The integration of artificial intelligence (AI) and machine learning algorithms further elevates this trend, as these technologies can help optimize storage and treatment schedules by learning from historical data.

The growing adoption of these digital solutions is also driven by the need to meet sustainability goals. By improving the precision of post-harvest treatments, these technologies help reduce resource usage, waste, and the environmental footprint of agricultural practices. As sustainability continues to be a key priority, data-driven solutions are expected to play an even larger role in shaping the future of the post-harvest treatment industry.

### Focus on Precision Post-Harvest Treatments

The focus on precision post-harvest treatments is a growing trend in the market as stakeholders look for ways to enhance the efficiency, sustainability, and effectiveness of

preservation methods. Precision treatments utilize advanced technologies to apply post-harvest solutions, such as chemicals, coatings, or temperature controls, with greater accuracy and minimal waste. This trend reflects a shift from broad-spectrum, generalized approaches to more tailored treatments that are customized to the specific needs of different crops, environments, and supply chain stages. By using precision techniques, producers can target areas requiring attention, such as controlling ethylene levels for fruit ripening or adjusting humidity to prevent spoilage in vegetables.

The application of precision post-harvest treatments also helps reduce the environmental impact associated with traditional methods. By minimizing the amount of chemicals and resources used, precision techniques contribute to more sustainable agricultural practices. For instance, controlled atmosphere storage systems, combined with sensors that monitor temperature, oxygen, and carbon dioxide levels, allow for optimal storage conditions with less energy consumption. These targeted interventions not only help extend shelf life but also ensure that produce reaches the consumer in the best possible condition, preserving both quality and nutritional value.

Increased demand for fresh, high-quality produce year-round further drives the trend towards precision post-harvest treatments. With the ability to track and manage conditions in real-time, producers and distributors can address challenges like transportation delays or unexpected climate changes that could compromise the quality of harvested crops. Precision agriculture technologies, including sensors, drones, and AI-driven solutions, are enabling more proactive management of the entire post-harvest process. As these innovations become more affordable and accessible, they are expected to play a critical role in transforming how post-harvest treatments are implemented, enhancing both operational efficiency and product quality in the long term.

## Segmental Insights

### Crop Type Insights

Based on the Crop Type, Vegetables emerged as the dominant segment in the Global Post-Harvesting Treatment Market in 2024. This is driven by the increasing demand for fresh, high-quality produce worldwide. Vegetables, being perishable and highly susceptible to spoilage, require advanced post-harvest treatments to preserve their freshness, nutritional value, and appearance during transportation and storage. Post-harvest treatments, including refrigeration, controlled atmosphere storage, and the application of natural or chemical preservatives, play a crucial role in extending shelf life and minimizing waste. As global supply chains for fresh vegetables continue to expand,



these treatments help ensure that produce maintains its quality from farm to table, meeting the expectations of consumers who demand fresh vegetables year-round. The growing consumer preference for healthy, plant-based diets, coupled with an increase in the consumption of vegetables, has further fueled the demand for effective post-harvest technologies. In addition, advancements in precision agriculture and real-time monitoring systems allow for better management of storage and treatment conditions, ensuring optimal preservation. These factors, along with the need to reduce food waste and improve sustainability in agriculture, have contributed to the dominance of vegetables in the post-harvest treatment market. As a result, the vegetable segment is expected to continue to lead the market in the coming years, driven by both demand and technological advancements.

### Origin Insights

Based on the Origin, Synthetic emerged as the dominant segment in the Global Post-Harvesting Treatment Market in 2024. This is due to their effectiveness, cost-efficiency, and widespread use in preserving the quality and shelf life of various agricultural products. Synthetic chemicals, such as fungicides, preservatives, and wax coatings, are widely used to protect crops from microbial growth, oxidation, and dehydration, which are common causes of spoilage. These treatments help maintain the appearance, texture, and nutritional content of harvested produce, allowing it to be transported and stored for longer periods without significant loss of quality. The widespread adoption of synthetic post-harvest treatments can be attributed to their proven track record in extending the shelf life of fruits, vegetables, and other perishables. These treatments also offer consistency and reliability in large-scale commercial farming and food supply chains, ensuring that produce reaches consumers in optimal condition. Furthermore, synthetic solutions are often more affordable compared to their organic counterparts, making them more accessible for farmers and distributors in both developed and developing regions.

### Regional Insights

Asia-Pacific emerged as the dominant region in the Global Post-Harvesting Treatment Market in 2024. This is primarily driven by a combination of factors such as the region's large agricultural base, increasing food demand, and growing awareness about food waste. The region is home to some of the largest agricultural producers, including countries like China, India, and Japan, which significantly contribute to the global food supply. With a vast production of fruits, vegetables, and grains, the need for effective post-harvest treatments to preserve the quality and reduce losses during storage and

transportation is critical. The rapid urbanization and growing middle-class population in Asia-Pacific have also fueled the demand for fresh produce year-round, driving the adoption of advanced post-harvest technologies. Moreover, as the region faces challenges related to food security and sustainability, there is an increasing focus on reducing post-harvest losses, which account for a substantial portion of total food waste in the region. The integration of technologies like controlled atmosphere storage, refrigeration, and precision agriculture is helping to mitigate these issues. Government initiatives aimed at improving food storage infrastructure and reducing post-harvest waste further contribute to the dominance of Asia-Pacific in the post-harvest treatment market. These combined factors are expected to maintain the region's leading position in the coming years.

### Key Market Players

Syngenta Crop Protection AG

Nufarm Ltd.

Agrofresh Inc.

Bayer AG

BASF SE

Citrosol SA

Hazel Technologies Inc.

Lytone Enterprises Inc.

Shandong Aoweite Biotechnology Co. Ltd.

Fine Chemicals Inc.

### Report Scope:

In this report, the Global Post-Harvesting Treatment Market has been segmented into the following categories, in addition to the industry trends which have also been detailed

below:

Post-Harvesting Treatment Market, By Type:

Coating

Ethylene Blockers

Cleaners

Fungicides

Sprout Inhibitors

Sanitizers

Other

Post-Harvesting Treatment Market, By Crop Type:

Fruits

Vegetables

Flowers & Ornamentals

Post-Harvesting Treatment Market, By Origin:

Natural

Synthetic

Post-Harvesting Treatment 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

### Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Post-Harvesting Treatment Market.

### Available Customizations:

Global Post-Harvesting Treatment market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

### Company Information

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

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## 16. ABOUT US & DISCLAIMER

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