

Nematicides Market: Current Analysis and Forecast (2025-2033)

<https://marketpublishers.com/r/N1446FD8C0A0EN.html>

Date: September 2025

Pages: 134

Price: US\$ 3,999.00 (Single User License)

ID: N1446FD8C0A0EN

Abstracts

A nematicide is a form of chemical or biological substance specifically formulated to manage or destroy plant-parasitic nematodes, or microscopic roundworms that infest the roots of agricultural crops, reducing their growth and yield, as well as lowering their quality. Nematicides may also be synthetic, naturally occurring, or bio-based products, and their application can be in the form of soil treatment, seed coating, or foliar sprays. They act by interfering with the nervous system, metabolism, or reproductive system of the nematodes.

The Nematicides market is set to show a growth rate of about 5.5% during the forecast period (2025-2033F). The global nematicide market is on an upward trend because of the increasing threat of the plant-parasitic nematodes that result in significant losses of yield and quality of important crops, including cereals, fruits, and vegetables, and commercial crops. The increasing world food demand, coupled with the need to have sustainable agriculture, is pushing farmers to use efficient nematode management practices. Also, the innovation of bio-based and environmentally friendly nematicides, combined with government subsidies for using crop protection systems, is driving market growth. The rise of high-value crops, the use of modern methods of farming, and raising awareness regarding integrated pest management are also contributing to the increase in the demand for nematicides across the globe.

Based on the chemical type category, the market is categorised into fumigants, organophosphates, carbamates, bio-nematicides, and others. Among these, fumigants hold the maximum market share in the nematicide market due to their broad-spectrum activity, fast-acting properties, and common use in high-value crops such as vegetables, fruits, and commercial crops. However, the bio-nematicides segment is expected to experience the most rapid growth, driven by

the global trend towards sustainable agriculture and the regulations that support biological crop protection methods.

Based on the nematode type category, the market is categorized into root-knot nematode, cyst nematode, and others. Among these, root-knot nematodes currently hold the maximum market share because they are the most widespread and destructive form of nematode species, afflicting a variety of crops, namely vegetables, fruits, and cereals. They are the main focus of nematicide applications because they cause massive losses in yields in various geographical locations. However, the growth rate of the cyst nematode segment is expected to accelerate in the future because of the rising cases of infestation of staple crops like soybean, wheat, and sugar beet. Additionally, the increase in the creation of specific nematicide-killing solutions is estimated to increase the demand for cyst nematode control.

Based on the formulation category, the market is segmented into liquid, granular, emulsifiable concentrates, and others. Among these, the liquid formulation segment currently holds the maximum market share in the nematicide market, due to its ease of application, increased soil penetration, and high level of protection of a variety of crops against nematode attacks. Modern irrigation systems, such as drip and sprinkler irrigation, also favour the use of liquid formulations, which makes them even more popular. However, the granular formulation segment is projected to experience tremendous growth, owing to its longer residual effect, targeted release, and reduced chances of leaching, making it suitable for sustainable and accurate farming practices, particularly in water-scarce regions and sandy soils.

Based on the application category, the market is segmented into grains and cereals, pulses and oilseeds, commercial crops, fruits and vegetables, and others. Among these, the grains and cereals segment holds the largest market share because of the large-scale farming of cereal crops such as wheat, maize, and rice that are very prone to infestation by nematodes such as root-knot and cyst nematodes. However, in the future, the fruits and Vegetables segment is expected to grow with the fastest CAGR. This is due to the fact that these crops have a high economic value and are more prone to attacks by nematodes.

For a better understanding of the demand of nematicides, the market is analyzed based on its worldwide adoption in countries such as North America (U.S., Canada, and the Rest of North America), Europe (Germany, U.K., France,

Spain, Italy, Rest of Europe), Asia-Pacific (China, Japan, India, and the Rest of Asia-Pacific), and Rest of World. Among these, North America holds the largest market share. This dominance is driven by progressive farming methods, large-scale farming activities, and the widespread occurrence of nematode infestations in key foods such as grains, fruits, and vegetables. Strong regulatory systems, properly developed distribution channels, and timely use of new chemical and bio-based formulations also increase market leadership. Also, intensive investments in research and development, precision farming technologies, and integrated pest control measures help North American farmers to effectively deal with nematode infestations, which maintains the market leadership in the region. However, the Asia-Pacific (APAC) region is expected to witness significant growth due to an increase in food security and environmentally friendly agricultural activities in this region.

Some major players running in the market include Bayer AG, BASF SE, American Vanguard Corporation, Biobest Group NV, Corteva Agriscience, Novonosis Group, FMC Corporation, Sumitomo Chemical Co., Ltd., Syngenta Crop Protection AG (China National Chemical Corporation), and UPL Ltd.

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