

# The Global Agrochemical Industry: the market

## Market Analysis – 2017-2019 Trends – Corporate Strategies

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**Exclusive extracts from this 121-page-long report:**

**- What is the business?**

*Sensu stricto*, the agrochemicals market comprises crop protection pesticides such as insecticides, herbicides, fungicides and seed treatment products. However, major agrochemical companies derive a large share of revenue from agricultural biotechnology (seed traits - also known as seed genomics or plant biotechnology). [...]

**- What are the main markets?**

Pesticide demand is well-balanced across the world's major agricultural regions. Latin America and Asia Pacific accounted, each, for a 27% share of global sales value, followed by Europe (23%) and NAFTA (18%). On a country basis, the US, Brazil, China and India are the industry's largest markets. [...]

**- Who are the key players?**

The agrochemical industry is highly consolidated, with the top six companies –Syngenta, Monsanto, Bayer, BASF, Dow and DuPont- accounting for over 60% of the global market value. Companies such as FMC, Adama, Sumitomo or Nufarm are smaller-scale players who tend to enjoy leading positions in a few markets (Nufarm in Australia and New Zealand, Sumitomo in Asia, etc.). The next tier of agrochemical solution providers is made up of national champions in India, China or in other large agrochemical markets such as Brazil. [...]

**- How intense is competition?**

Competitive rivalry in the agrochemical industry has traditionally been moderate, as evidenced by the industry's high operating margins. In addition to agrochemicals, competition extends to crop biotechnology (GM seeds). Leaders such as Monsanto, DuPont, Bayer and Dow have all developed strong positions in biotech seeds, with peers such as BASF, Syngenta and Sumitomo seeking to catch up. The market is flooded by alliances that are designed to enhance trait discovery, and building a strong biotechnology partnership network has become a key competitive advantage. [...]

To find out more on the sector and its leading corporations, please find enclosed the order form to obtain this exclusive report by Xerfi Global.

**Mihai Frent**  
Analyst, Xerfi Global

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