

IPM Pheromone Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Biologicals, Biopesticides & Crop Protection (Agriculture & Agribusiness)

> **Source:** <https://www.mordorintelligence.com/industry-reports/ipm-pheromone-market>

> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 1.51 billion
Projected Forecast (2031)	USD 1.51 billion
Growth Rate (CAGR)	12.95 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in IPM Pheromone industry](images/chart_2.png)

! [IPM Pheromone Market Size](images/chart_3.png)

! [IPM Pheromone Market Share by Type, 2025](images/chart_4.png)

! [IPM Pheromone Market Share by Mode of Application, 2025](images/chart_5.png)

! [IPM Pheromone Market CAGR (%), Growth Rate by Region](images/chart_6.png)

! [IPM Pheromone Market Concentration](images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2021 - 2031 |

Market Size (2026) | USD 1.51 Billion |

Market Size (2031) | USD 2.78 Billion |

Growth Rate (2026 - 2031) | 12.95 % |

Fastest Growing Market | Asia Pacific |

Largest Market | Europe |

Market Concentration | Medium |

Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

IPM Pheromone Market Analysis by Mordor Intelligence The IPM pheromone market size is expected to grow from USD 1.34 billion in 2025 to USD 1.51 billion in 2026 and is forecast to reach USD 2.78 billion by 2031 at 12.95% CAGR over 2026-2031. Robust demand stems from tightening residue limits, shrinking arable land, carbon-credit incentives, and subsidy programs that lower entry barriers. Mating disruption dominates perennial crops because season-long efficacy reduces spray labor, while mass trapping gains momentum as precision-agriculture tools pinpoint pest hotspots. Biodegradable dispensers, microencapsulation advances, and fermentation-based synthesis fortify competitive moats for incumbents. Europe leads adoption under the Sustainable Use of Pesticides Directive, but Asia-Pacific delivers the fastest growth on the back of China's Green Development Plan and India's smallholder subsidies. North America monetizes organic premiums, whereas South America and Africa present white-space opportunities as export horticulture expands.

Key Report Takeaways* By type, pheromones held a 45.40% revenue share in 2025, while aggregation pheromones are projected to expand at a 14.85% CAGR through 2031.
* By function, mating disruption held 51.60% of IPM pheromone market share in 2025, and mass trapping is forecast to register the fastest 14.10% CAGR to 2031.
* By mode of application, dispensers commanded 41.10% of IPM pheromone market share in 2025, while the same segment is projected to post a 13.45% CAGR through 2031.
* By crop, field crops accounted for 39.20% of the IPM pheromone market size in 2025, whereas vegetable crops are anticipated to grow at a 13.85% CAGR to 2031.
* By geography, Europe led with 31.80% of IPM pheromone market share in 2025, and Asia-Pacific is forecast to expand at a 12.20% CAGR by 2031.

Key Market Trends

Market Trends and Insights Drivers Impact Analysis of IPM Pheromone Market*
Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline |
Shrinking agricultural land | +2.5% | Global, strongest in Asia-Pacific and Europe | Long term (≥ 4 years) |
Growing awareness of sustainable pest management | +2.8% | North America and European Union leading, Asia-Pacific rising | Medium term (2-4 years) |
Increasing demand for crop-protection solutions | +2.3% | Global, yield-intensive regions | Medium term (2-4 years) |
Government incentive programs for pheromone-based IPM | +2.0% | North America, European Union, India, and China | Short term (≤ 2 years) |
Advances in microencapsulation for controlled release | +1.8% | Global, R&D hubs in North America and Japan | Long term (≥ 4 years) |
Carbon-credit-linked adoption of low-emission pest control | +1.2% | European Union and North America, pilots in South America | Long term (≥ 4 years) |
Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The IPM pheromone market exhibits moderate concentration: the top five companies, Suterra, Shin-Etsu Chemical, BASF, ISCA, and Provivi, held modest percentage of revenue in 2025. Regional fragmentation persists as local formulators market generic blends 30%-40% cheaper. Intellectual property around microencapsulation elevates entry barriers; challengers, therefore, pivot to fermentation, even though yields lag and costs stay high. Suterra leverages vertical integration from s

ynthesis to dispenser fabrication, enjoying 18%-22% cost advantages and strengthening positions in North America and Europe.

Provivi's alliance with Syngenta rolled out YSB Eco-Dispenser for rice and FAW E co-Granules for maize, pairing pheromones with adjuvants that extend persistence under humidity. ISCA's SPLAT carrier, a hand-applied paste, halves application labour, aligning with labour-scarce regions. Russell IPM and Koppert Biological Systems bridge monitoring and mating disruption portfolios, providing turnkey IPM packages to European greenhouses. Bedoukian Research, Pherobank, Novagrica, and Alpha Scents specialise in custom blends for niche pests, while Blue Magpie India scales low-cost traps for smallholders.

Biodegradable polymers, drone deployment, and data-linked advisory platforms serve as primary differentiation axes. Generic production expansion in China and India is anticipated to compress margins 8%-12% through 2030. Patent expirations after 2027 will intensify price pressure, but leading firms bank on advanced carriers and bundled agronomic services to defend share. The resulting landscape balances innovation among leaders with cost competition from regionals, creating a dynamic yet orderly market.

IPM Pheromone Industry Leaders* Suterra (The Wonderful Company)

- * Shin-Etsu Chemical Co.

- * Russell IPM

- * ISCA

- * BASF SE

- * *Disclaimer: Major Players sorted in no particular order

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Scope Methodology P Space

This market covers pheromone based solutions used in integrated pest management to detect, monitor, mass trap, or disrupt mating of insect pests, mainly across crop production settings. Revenues are captured for pheromone products and the application formats used in pest control decisions.

Scope exclusions: This sizing excludes conventional chemical pesticides, biological control agents, and general trap hardware sold without pheromone lures or active pheromone formulations.

Segmentation Container

- * Type* Pheromones

- * Aggregation pheromones

- * Others

- * Function* Mating disruption

- * Detection and monitoring

- * Mass trapping

- * Mode of Application* Traps

- * Sprayers

- * Dispensers

- * Crop* Field crops

- * Vegetable crops

- * Other crops

- * Geography* North America* United States
- * Canada
- * Mexico
- * Rest of North America
- * Europe* Germany
- * United Kingdom
- * France
- * Russia
- * Spain
- * Rest of Europe
- * Asia-Pacific* India
- * China
- * Japan
- * Rest of the Asia-Pacific
- * South America* Brazil
- * Argentina
- * Rest of South America
- * Middle East* United Arab Emirates
- * Saudi Arabia
- * Rest of Middle East
- * Africa* South Africa
- * Egypt
- * Rest of Africa

Frequently Asked Questions

What is the current value of the IPM pheromone market?

The IPM pheromone market size is USD 1.51 billion in 2026.

How fast will IPM pheromone adoption grow?

The market is forecast to post a 12.95% CAGR over 2026-2031 and reach USD 2.78 billion by 2031.

Which function leads pheromone usage?

Mating disruption accounts for 51.60% of market share, especially in perennial tree crops.

Which region will see the fastest growth?

Asia-Pacific is anticipated to expand at a 12.20% CAGR through 2031 on the back of Chinese and Indian subsidy programs.