

IRAC 30 Insecticides Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Biologicals, Biopesticides & Crop Protection (Agriculture & Agribusiness)
> **Source:** <https://www.mordorintelligence.com/industry-reports/irac-30-insecticides-market>
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 650.09 million
Projected Forecast (2031)	USD 650.09 million
Growth Rate (CAGR)	6.20 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in IRAC 30 Insecticides industry] (images/chart_2.png)

! [IRAC 30 Insecticides Market Size] (images/chart_3.png)

! [IRAC 30 Insecticides Market Share by Application Mode, 2025] (images/chart_4.png)

! [IRAC 30 Insecticides Market Share by Crop Type, 2025] (images/chart_5.png)

! [IRAC 30 Insecticides Market Growth Rate by Region] (images/chart_6.png)

! [IRAC 30 Insecticides 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 650.09 Million |
Market Size (2031) | USD 878.21 Million |
Growth Rate (2026 - 2031) | 6.20 % |
Fastest Growing Market | Asia-Pacific |
Largest Market | North America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

IRAC 30 Insecticides Market Analysis by Mordor Intelligence
The IRAC 30 Insecticides Market size is projected to grow from USD 612.40 million in 2025 to USD 650.09 million in 2026 and is forecast to reach USD 878.21 million by 2031 at 6.20% CAGR over 2026-2031. IRAC Group 30 places gamma-aminobutyric acid (GABA)-gated chloride channel allosteric modulators into two chemical subgroups namely meta-diamides such as broflanilide and cyproflanilide, and isoxazolines such as fluxametamide and isocycloseram. This makes the IRAC 30 insecticides market one of the newest commercial chemistry classes in crop protection. This mode of action uses a distinct binding site on the insect GABA receptor, which is why the IRAC 30 insecticides are used in resistance rotation programs with no known cross-resistance to older groups such as cyclodienes, organophosphates, and pyrethroids. That differentiation helps the IRAC 30 insecticides market maintain demand even as growers review input costs more carefully, because these products support both immediate pest control and longer rotation planning. Competition remains tight because a small number of innovator companies control the currently commercially active ingredients, while recent registrations by Syngenta Group Co., Ltd. and long-standing commercialization rights held by BASF SE and Mitsui Chemicals, Inc. continue to shape market access across major crop systems.

Key Report Takeaways* By application mode, foliar was the largest segment, accounting for 55.2% of the IRAC 30 insecticides market share in 2025, while seed treatment is forecast to grow at a CAGR of 6.8% from 2026 to 2031, making it the fastest-growing segment.

* By crop type, grains and cereals were the largest segment, accounting for a 41.2% share of the IRAC 30 insecticides market size in 2025, while pulses and oilseeds are forecast to grow at a CAGR of 6.6% from 2026 to 2031, making them the fastest-growing segment.

* By geography, North America was the largest region, accounting for a 37.6% share in 2025, while Asia-Pacific is forecast to grow at a CAGR of 6.7% from 2026 to 2031, making it the fastest-growing region.

Key Market Trends

Market Trends and Insights
Drivers Impact Analysis of IRAC 30 Insecticides Market

*Driver | (~) % Impact on CAGR Forecast | Geographic Relevance | Impact Timeline

Rising need for resistance-management chemistry | +2.5% | Global | Medium term (2-4 years) |

Tightening active-ingredient re-registration timelines | +1.2% | North America and Europe | Medium term (2-4 years) |

Expansion of high-value seed treatment programs | +0.8% | North America and Asia-Pacific | Long term (≥ 4 years) |

Precision application enabling lower dose economics | +0.5% | Global | Long term (≥ 4 years) |

Residual efficacy premium for novel modes of action | +0.7% | North America, Europe, and Asia-Pacific | Short term (≤ 2 years) |

Digital pest forecasting improving spray timing | +0.4% | North America and Europe | Long term (≥ 4 years) |

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The IRAC 30 insecticides market is moderately concentrated in 2025, with 5 origi

nating companies accounting for the currently commercial or advanced Group 30 molecules listed in the source material. Those companies are BASF SE, Syngenta Group Co., Ltd., FMC Corporation, Bayer AG, and Corteva, Inc. This structure means the IRAC 30 insecticides market has a narrow innovation base, even though formulation, channel access, and country-level product expansion can be broader. BASF SE holds principal commercialization rights for broflanimide in Western markets under its arrangement with Mitsui Chemicals, Inc., while Mitsui Chemicals, Inc. retains the main role in Japan and Asia. That division of rights keeps the market organized around a small set of technology owners rather than a wide field of fully independent competitors.

Syngenta Group Co., Ltd. made the most visible market-opening move when the Environmental Protection Agency (EPA) granted final registration for 10 isocycloseram products in November 2025 across foliar, seed treatment, turf, ornamental, and indoor pest management uses. The company had already prepared the channel with brand announcements for Incipio, Vertento, and Zivalgo in April 2025, followed by Opello and Euento in February 2025, which shows a sequenced commercialization plan rather than a single launch event. BASF SE and Mitsui Chemicals, Inc. made an earlier strategic move by aligning commercialization rights around broflanimide, which helped the chemistry enter Western and Asian crop systems under coordinated ownership. Mitsui Chemicals Crop and Life Solutions, Inc. also gained a separate visibility boost in 2025 when the World Health Organization prequalification program adopted a specification for broflanimide wettable powder for vector control[3]Source: World Health Organization Prequalification Programme, “Broflanimide WP Specification,” World Health Organization, who.int.

Technology integration is becoming a practical differentiator in the IRAC 30 insecticides market because digital crop tools improve timing, targeting, and stewardship around premium chemistry. Syngenta Group Co., Ltd. is also expanding the class into professional turf through Atexzo, broadening the revenue base beyond row crops and vegetables. At the same time, stewardship rules remain a structural part of competition because registrants need sensitivity monitoring and rotation guidance before scale expansion is responsible. The result is a market where molecule ownership is tight, commercialization is selective, and competitive advantage comes from registration reach, agronomic support, and the ability to preserve efficacy over time.

IRAC 30 Insecticides Industry Leaders* FMC Corporation

* Syngenta Group Co., Ltd.

* BASF SE

* Bayer AG

* Corteva, Inc.

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global IRAC 30 Insecticides Market Report ScopeInsecticides are chemical or biological substances specifically formulated to kill, repel, or control insects. They are widely utilized in agriculture to protect crops and prevent the spread of insect-borne diseases. Chemigation, foliar, fumigation, seed treatment, and soil treatment are covered as segments by application mode. Commercial crops, fruits and vegetables, grains and cereals, pulses and oilseeds, and turf and ornamentals are covered as crop-type segments. North America, Europe, Asia-Pacific, South America, Middle East, and Africa are the regions covered.

Application ModeChemigation |

Foliar |
Fumigation |
Seed Treatment |
Soil Treatment |

Segmentation Accordion Item

GeographyNorth America | United States |
| Canada |
| Mexico |
| Rest of North America |
South America | Brazil |
| Argentina |
| Rest of South America |
Europe | Germany |
| United Kingdom |
| France |
| Italy |
| Spain |
| Russia |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| South Korea |
| Australia and New Zealand |
| Rest of Asia-Pacific |
Middle East | Saudi Arabia |
| United Arab Emirates |
| Rest of Middle East |
Africa | South Africa |
| Egypt |
| Rest of Africa |

Frequently Asked Questions

What is market size forecasted in IRAC 30 insecticides through 2031?

Growth is mainly tied to resistance-management demand, newer approval timelines than older chemistries, and stronger seed treatment use in cereals and row crops . The market is projected to rise from USD 650.09 million in 2026 to USD 878.21 million by 2031 at a 6.20% CAGR.

Which application mode leads current demand?

Foliar is the largest application mode with 55.2% share in 2025, supported by broad use in vegetables, cotton, and tree fruit where fast knockdown and residual activity are both important.

Which crop segment is expanding the fastest?

Pulses and oilseeds is the fastest crop segment and is projected to grow at a 6.6% CAGR through 2031, supported by canola acreage growth and stronger legume intensity in parts of South Asia.

Why is North America the largest regional market?

North America held 37.6% share in 2025 because of its cereal and specialty crop base, established seed treatment demand, and the Environmental Protection Agency (EPA) registration of 10 isocycloseram products in 2025.