

Seed Treatment Fungicides Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Seeds, Seed Treatment & Produce (Agriculture & Agribusiness)
> **Source:** https://www.mordorintelligence.com/industry-reports/seed-treatment-fungicides-market
> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 2.41 billion
Projected Forecast (2031)	USD 2.41 billion
Growth Rate (CAGR)	9.48 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

! [Major players in Seed Treatment Fungicides industry] (images/chart_2.png)

! [Seed Treatment Fungicides Market Size] (images/chart_3.png)

! [Seed Treatment Fungicides Market Share by Fungicides Type, 2025] (images/chart_4.png)

! [Seed Treatment Fungicides Market Share by Crop Type, 2025] (images/chart_5.png)

! [Seed Treatment Fungicides Market Growth Rate by Region] (images/chart_6.png)

! [Seed Treatment Fungicides Market Concentration] (images/chart_7.png)

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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2021 - 2031
Market Size (2026)	USD 2.41 Billion
Market Size (2031)	USD 3.79 Billion
Growth Rate (2026 - 2031)	9.48 %
Fastest Growing Market	South America
Largest Market	North America
Market Concentration	Medium

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Market Overview

Seed Treatment Fungicides Market Analysis by Mordor IntelligenceThe seed treatment fungicides market size is projected to grow from USD 2.21 billion in 2025 and USD 2.41 billion in 2026 to USD 3.79 billion by 2031, registering a CAGR of 9.48% between 2026 to 2031. Demand is shifting toward preventive protection, as seed-applied products act at germination, when seedlings face their earliest disease exposure. Targeted applications also help growers reduce spray-coverage variation and manage residue requirements in export-oriented crop programs. Multi-mode premixes are gaining adoption as they combine resistance management with simpler handling at the treatment stage. Digital disease forecasting is linking treatment choices with field history and pathogen risk, making data partnerships more relevant to supplier strategies. These factors support opportunities for products that combine practical application, residue compliance, and reliable disease control in the Seed treatment fungicides market.

Key Report Takeaways

- * By fungicide type, chemical fungicides held 72% of the seed treatment fungicides market share in 2025, while biological fungicides are forecast to grow at a 10% CAGR through 2031.
- * By active ingredient class, triazoles held 28% of the seed treatment fungicide market size in 2025, while carboxamides are forecast to grow at a 10.2% CAGR through 2031.
- * By formulation, liquid products accounted for 64% of the market revenue in 2025 and are forecast to grow at a 9.8% CAGR through 2031.
- * By crop type, cereals and grains held 44.7% of 2025 revenue, while oilseeds and pulses are projected to register 9.9% CAGR during the forecast period.
- * By geography, North America led with a 31% revenue share in 2025, and the South America region is advancing at a 10.1% CAGR through 2031.

Key Market Trends

Global Seed Treatment Fungicides Market Trends and InsightsDrivers Impact Analysis*

Driver	(~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Rising seed-borne and soil-borne disease pressure	+2.1%	Global, highest in North America and Europe	Short term (≤ 2 years)
Higher adoption of commercially treated seed	+1.8%	Global, highest in North America and South America	Short term (≤ 2 years)
Biological fungicide pipeline expansion	+1.5%	Global, highest in Europe and North America	Medium term (2-4 years)
Multi-mode fungicide premixes for resistance management	+1.2%	Global, with concentration in North America and Europe	Medium term (2-4 years)
Precision seed coating and micro-dosing	+0.9%	North America and Europe, with emerging gains in Asia-Pacific	Long term (≥ 4 years)
Low-dust encapsulation and residue-compliance upgrades	+0.7%	Europe, North America, and Asia-Pacific core	Medium term (2-4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

The seed treatment fungicides market is moderately concentrated, with Syngenta Group AG, BASF SE, Bayer AG, Corteva Agriscience, Inc., and FMC Corporation among the leading market participants. These companies compete through active ingredient portfolios, registration coverage, formulation quality, and agronomic service capabilities. Encapsulation, suspension concentrates, and low-dust platforms remain important product differentiators. Data-based recommendations can also improve the fit between treatment selection and field pathogen risk. Regional formulators compete through local registration knowledge and established distribution relationships. This structure leaves meaningful revenue outside the leading suppliers for crop specialists and local providers.

BASF SE and ADAMA Ltd signed a co-development and commercialization agreement for Gilboa, a FRAC Group 32 cereal fungicide with a new mode of action, during December 2025. The agreement illustrates how large suppliers can secure pipeline access through licensing and shared development. BASF SE also registered Integral Pro for sunflower seed treatment in France during November 2025. These developments reflect a focus on new modes of action, biological capability, and broader disease control, and indicate that product development is increasingly tied to resistance management needs.

Biological specialists can extend reach through distribution agreements without building the same registration infrastructure as major chemical suppliers. Koppeert Biological Systems B.V. and Amoéba signed a 5-year exclusive distribution agreement in 2025 for a Willaertia magna C2c Maky-based biofungicide covering 18 European countries and the United States. Smaller companies can also focus on single-crop biological packs, emerging-market premixes, and crop-specific formulations, areas that reward speed and local crop knowledge. The seed treatment fungicides market therefore combines large global portfolios with targeted regional and biological innovation. Competition will remain moderate because leading firms have scale, while specialist suppliers retain identifiable routes to growth.

Seed Treatment Fungicides Industry Leaders* Syngenta Group AG

* BASF SE

* Bayer AG

* Corteva Agriscience, Inc.

* FMC Corporation

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Seed Treatment Fungicides Market Report ScopeThe seed treatment fungicides are fungicidal products applied to seeds before planting to protect them from seed-borne and soil-borne fungal diseases and support healthy crop establishment.

The Seed Treatment Fungicides Report is Segmented by Fungicide Type (Chemical and Biological), by Active Ingredient Class (Triazoles, Strobilurins, Carboxamides, Phenylamides, Phenylpyrroles, and More), by Formulation (Liquid, Powder and Dry, Flowable Concentrate, and Suspension Concentrate), by Crop Type (Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Turf and Ornamentals, Fiber Crops, and Silage and Forage Crops), and by Geography (North America, South America, Europe, Asia-Pacific, Middle East, and Africa). The Market Forecasts are Provided in Terms of Value (USD).

By Fungicide TypeChemical Fungicides |
Biological Fungicides |

Segmentation Accordion Item

By GeographyNorth America | United States |
| Canada |
| Mexico |
| Rest of North America |
South America | Brazil |
| Argentina |
| Chile |
| Rest of South America |
Europe | Russia |
| France |
| Germany |
| Italy |
| Spain |
| United Kingdom |
| Netherlands |
| Rest of Europe |
Asia-Pacific | China |
| India |
| Japan |
| Australia |
| Indonesia |
| Thailand |
| Vietnam |
| Philippines |
| Rest of Asia-Pacific |
Middle East | Turkey |
| Saudi Arabia |
| United Arab Emirates |
| Rest of Middle East |
Africa | South Africa |
| Egypt |
| Nigeria |
| Rest of Africa |

Frequently Asked Questions

What is the seed treatment fungicides market size through 2031?

The sector is valued at USD 2.41 billion in 2026 and is forecast to reach USD 3.79 billion by 2031, growing at a 9.48% CAGR.

Which fungicide type has the highest revenue?

Chemical fungicides held 72% of 2025 value because of established registrations, broad efficacy, and practical commercial application.

Why are biological seed treatments expanding?

Biological fungicides are forecast to grow at a 10% CAGR through 2031 as residue requirements and formulation improvements support broader use.

Which region leads seed treatment fungicide demand?

North America held 31% of 2025 revenue and is forecast to grow at an 8.8% CAGR through 2031.

Which crop group generates the most demand?

Cereals and grains held 44.7% of 2025 revenue because of large treated wheat, ba

rley, corn, and rice seed volumes.