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Global biostimulant market reaches $ 4.47 bn as industry signals maturity

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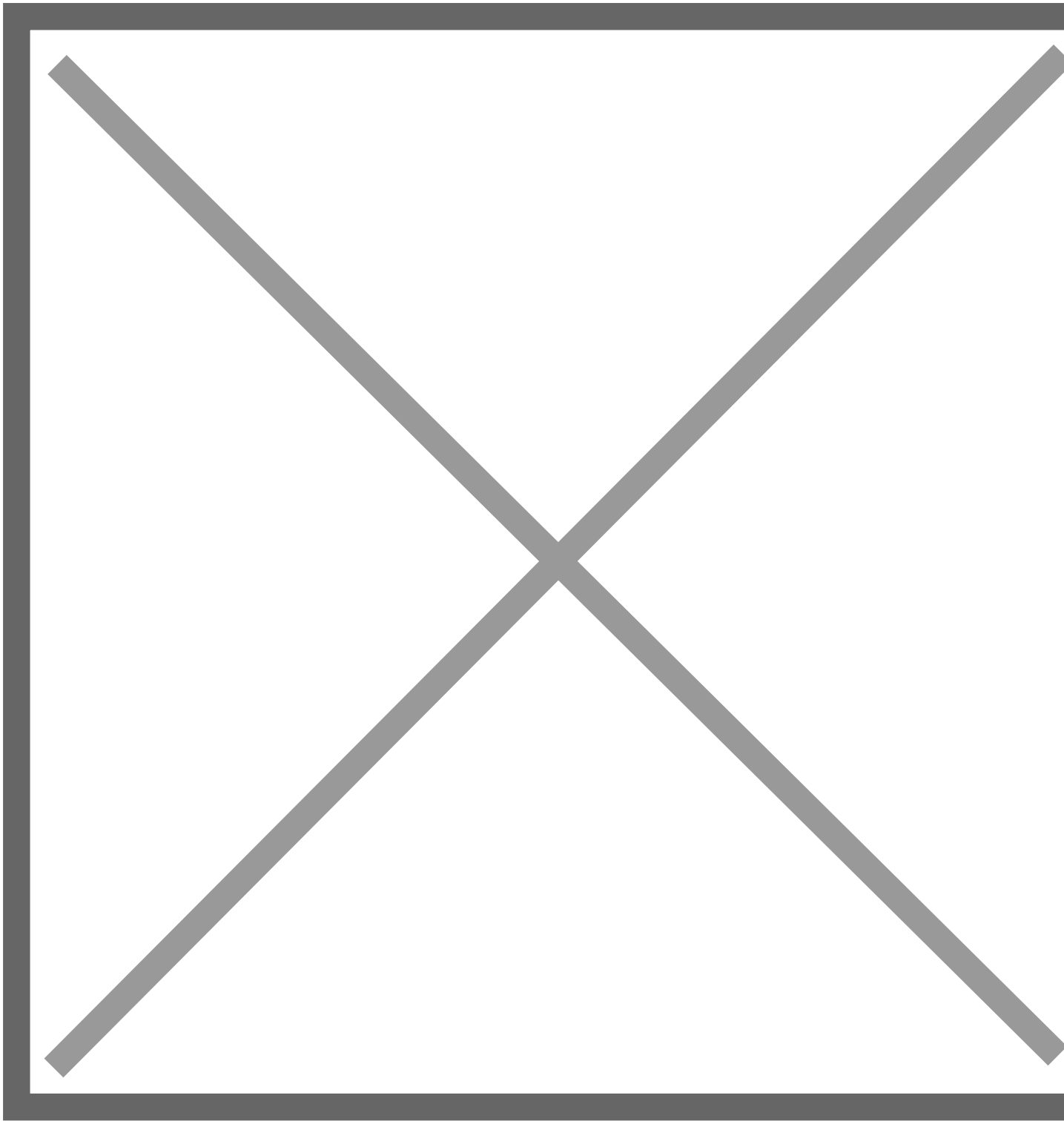
The global biostimulant market has achieved $ 4.47 billion in value with a visible shift from opportunistic to science-based market development, according to Dunham Trimmer's new 2025 Global Biostimulant Market Report, set to be unveiled at the Biostimulants World Congress in Barcelona, December 1-4, 2025.

The comprehensive analysis projects a 9.9 per cent compound annual growth rate (CAGR) through 2030â??the first time future growth projections have dipped below the double-digit benchmarks historically associated with the broader biologicals sector. However, the firm emphasizes this reflects the natural evolution of a strong market rather than weakness. Dunham Trimmer Market Reports are widely regarded as the most accurate and insightful studies serving the biologicals industries.



"Mathematics have been unyielding," said Manel Cervera, Managing Partner and Chief Commercial Officer at Dunham Trimmer, when speaking of the growth rate. "Two factors fundamentally explain this outcome: several of the largest markets are showing early signs of maturity while at the same time the market's critical mass has increased substantiallyâ??thus, even when absolute growth remains strong, relative growth rates decline."

Notably, the Report reveals that market absolute values will increase by more than half a billion dollars annually through the end of the decade, underscoring the segment's robust (albeit moderating) expansion.

Regional Dynamics Reshape Global Landscape

Latin America has consolidated its position as the leading market in both value and growth, with Brazil contributing half the region's revenue. The USA maintains its status as the world's largest single market, with Dunham Trimmer citing the significant impact of major U.S. distributors who have evolved into formulation powerhouses.

Europe's fourth-place ranking may surprise observers, given European companies' historical leadership in international market development. While Mediterranean markets created major industry leaders, growth elsewhere in the region has not reached critical mass to elevate overall trajectories. However, increasing interest in CE certification could reinvigorate the unified 27-country EU market.

Africa remains relatively small overall, with structural constraintsâ??including commercial-channel development and agricultural-system fragmentationâ??limiting widespread adoption, though DunhamTrimmer anticipates accelerated emergence as a growth pole early next decade.

Product Innovation and Application Trends

Amino acids reaffirm their leadership position among biostimulant substances, valued for versatility in formulations and strong alignment with circularity principles. Algae extracts also retain premium positioning as the second-largest segment, while humic and fulvic acids remain relevant, particularly as irrigated acreage expands.

As a potential game-changer going into the future, Dunham Trimmer highlights the emerging Single Biostimulant Molecule (SBM) market, which is bringing forth products that offer higher specificity and more consistent efficacy (with reduced dependency on agronomic conditions)â??potentially unlocking large-scale adoption in row crops and cereals.

For the first time, the new Global Biostimulant Report takes on a major innovation by subdividing the market by product use. Spurred by segmentation aligned with EU Regulation 2019/1009 (Fertilising Products Regulation, or FPR) , nutrient use efficiency (NUE) represents the largest biostimulant application category, followed closely by abiotic stress resistance, which is capturing growing market share amid climate challenges in all geographies.

Fruits and vegetables remain the primary crop segment, representing over half of total demand, though row crops and cereals are expanding most rapidlyâ??positioned to become the next major growth driver.

Despite moderated percentage growth, Dunham Trimmer concludes that the sector's proven resilience through pandemic disruptions and inflationary pressures, combined with emerging technological opportunities, strongly reinforces optimism for biostimulants' role in addressing agricultural challenges while advancing global sustainability objectives.