



- 2025 - CROP PROTECTION MARKET OUTLOOK

MARKET OUTLOOK OVERVIEW

2025 Forecast

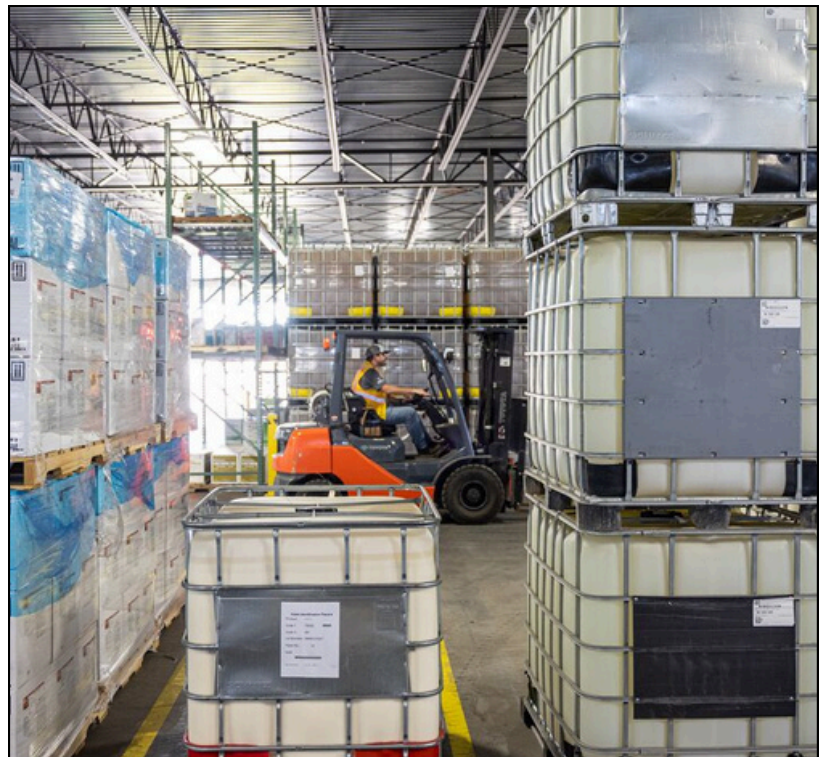
- Overall, the 2025 crop protection market outlook is positive.
- Prices for the majority of popular active ingredients are expected to remain relatively stable, with supply also anticipated to remain consistent going into next season.
- However, be aware of possible price changes for 2,4-D Ester in 2025 due to proposed duties on imported supply.

Purchasing Strategy

- Prices for many ag chem products often dip in the fall and peak in-season in alignment with the seasonal dynamics of global shipping and logistics. Fall is an economically savvy time to review price trends and consider purchasing early for next season.
- Instead of trying to time the chem market or focusing solely on cost as your primary purchasing driver, prioritize your 2025 agronomic strategy when selecting products.
- Given the cost of capital in today's high interest rate environment, look for savings opportunities like zero interest financing or other discount offers to optimize your financial position going into next season.

Inside This Report

- By examining chem price trends over the last eight years, this report predicts 2025 pricing and availability expectations for six key active ingredients (AIs), including:
 - Glyphosate
 - Glufosinate
 - 2,4-D Ester
 - Dicamba
 - Atrazine
 - S-Metolachlor
- Insights are based on *FBN* member-submitted invoices and *FBN* proprietary data.



GLYPHOSATE OUTLOOK

Price Expectation:

Stable

Supply Expectation:

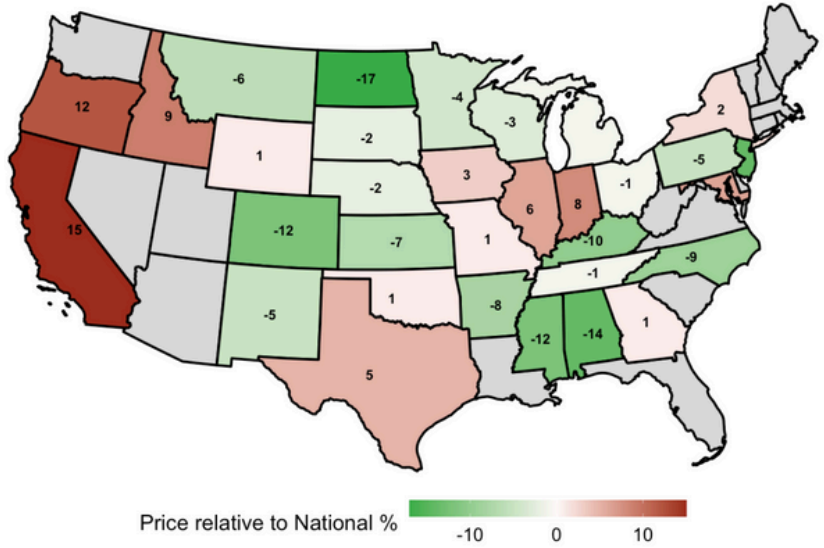
Stable

Looking ahead to the 2025 season, expect to see both pricing and product availability for glyphosate, the largest herbicide sold globally, remain steady.

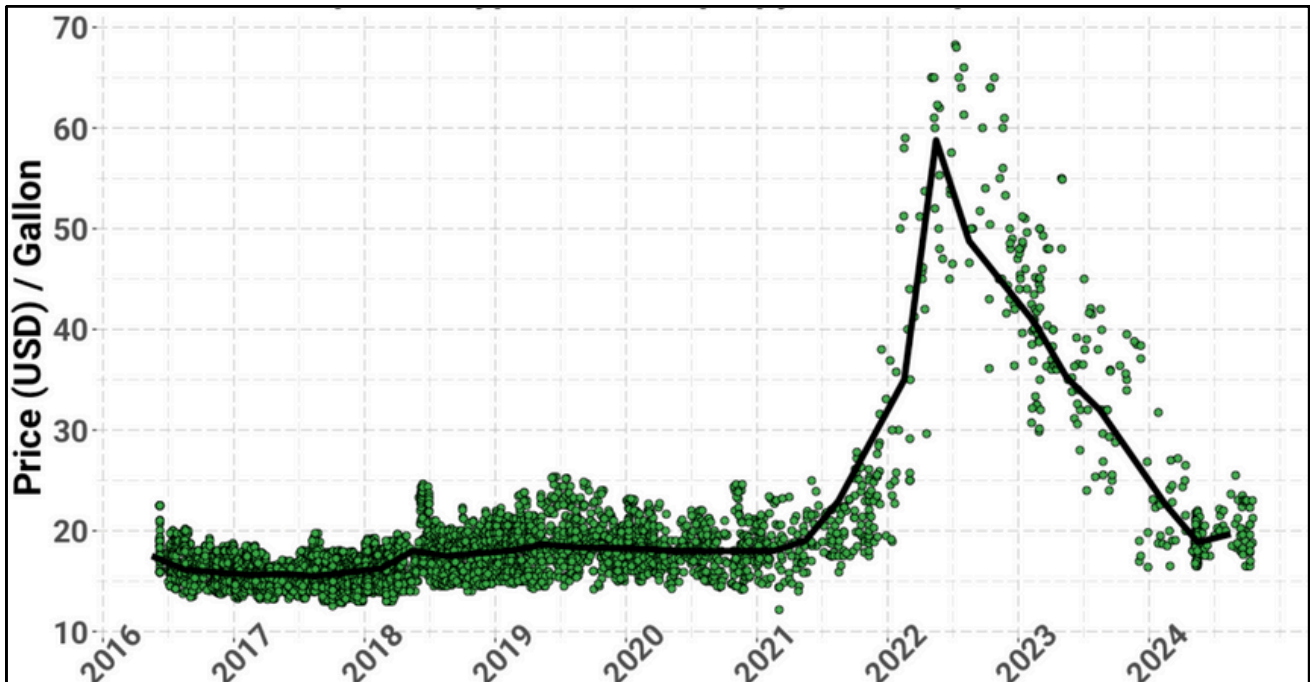
Based on member-submitted invoice data, glyphosate pricing appears to have peaked in 2022, started to drop in 2023, and returned to standard levels in 2024. While there may be a slight bump coming in 2025 compared to pre-2022 prices, overall prices next season are expected to continue this stable trend.

Product availability is also expected to remain stable going into the 2025 season.

State vs. National Price Trends



Average Price Trends



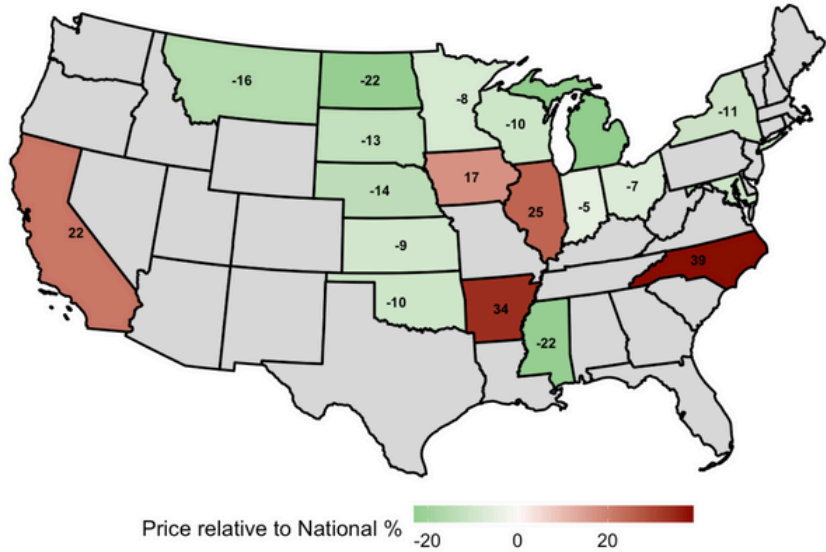
GLUFOSINATE OUTLOOK

Price Expectation:
Stable

Supply Expectation:
Stable

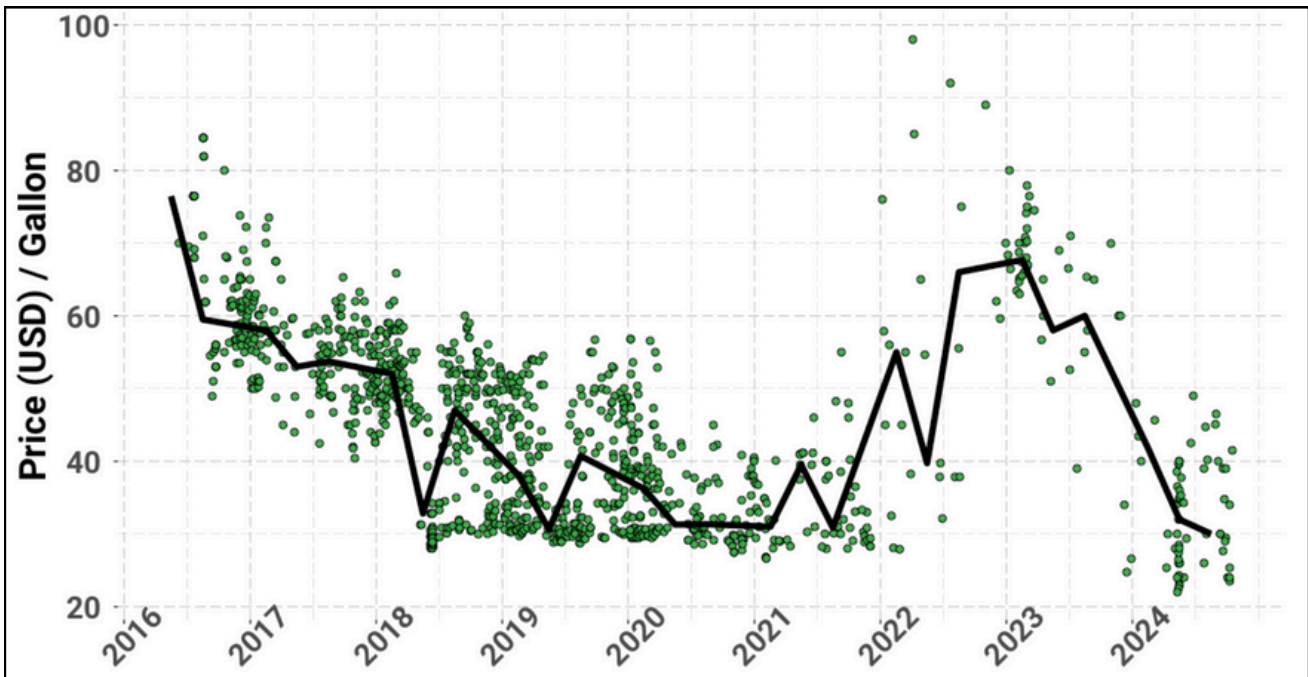
Glufosinate cost and supply availability are expected to remain consistent moving into the 2025 season. Following price increases in 2022 and a return toward normal in 2023, prices in 2024 quickly dropped down to previous levels and are expected to maintain the same trend moving into the next season.

State vs. National Price Trends



If you're seeing high prices on glufosinate, it may be a good idea to find another supplier to ensure you're paying a fair price. While prices could be somewhat variable within a limited range, they should not be particularly high or at the same levels as 2022 and 2023 seasons.

Average Price Trends



2,4-D ESTER OUTLOOK

Price Expectation:
Likely to Increase

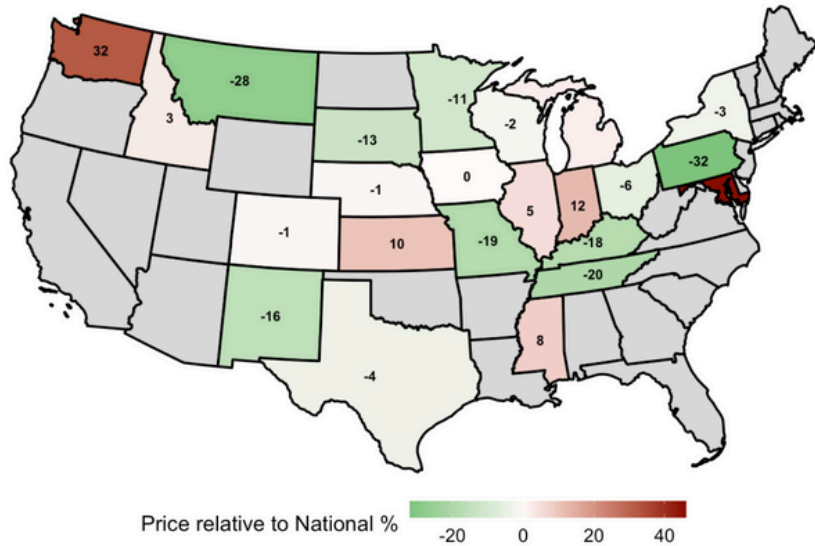
Supply Expectation:
Potential Changes

2,4-D Ester may see a substantial price increase in 2025 fueled by newly proposed import duties on the herbicide.

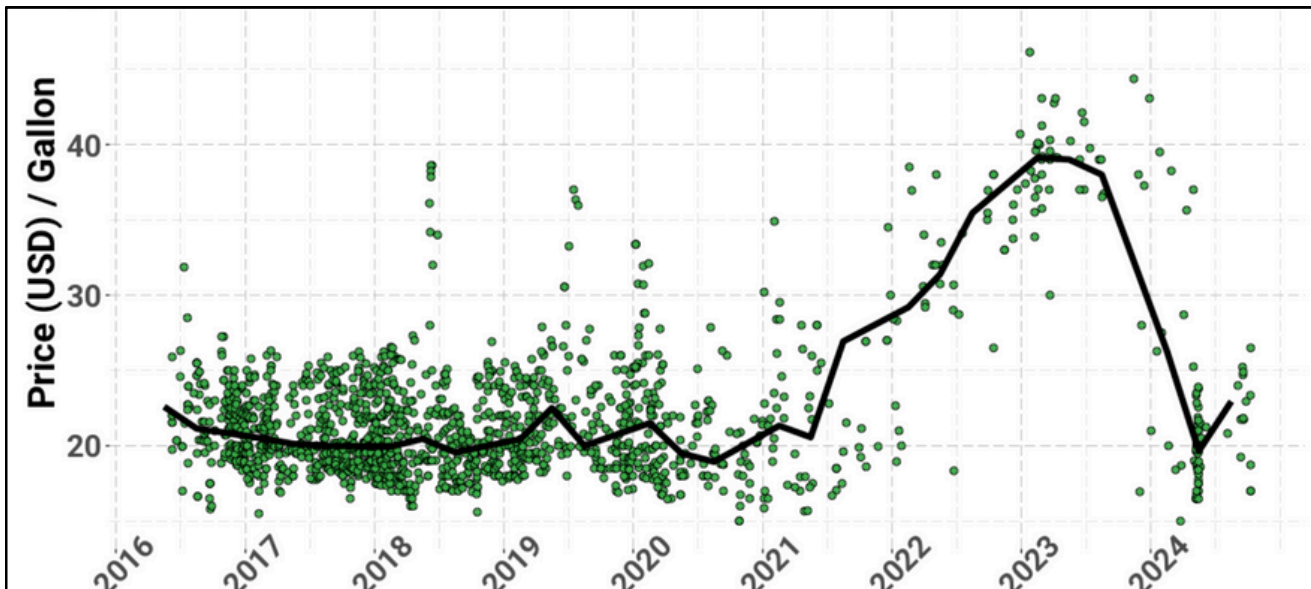
In September 2024, the U.S. Department of Commerce issued a preliminary order recommending countervailing duties on imports of 2,4-D herbicide from China and India, which account for 78% of all 2,4-D sales in the United States.

A final decision on the order, which is part of a broader antidumping investigation, is expected in March 2025. If the proposed duties are implemented at that time, prices for 2,4-D are expected to increase substantially due to the products' limited domestic production. Supply should remain relatively stable, though availability timelines may be delayed slightly at the start of the 2025 season.

State vs. National Price Trends



Average Price Trends



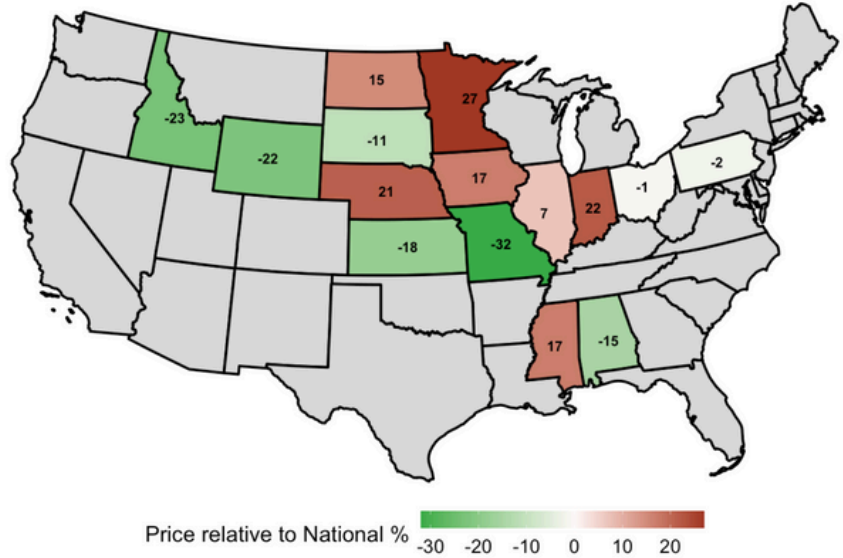
DICAMBA OUTLOOK

Price Expectation:
Stable

Supply Expectation:
Stable

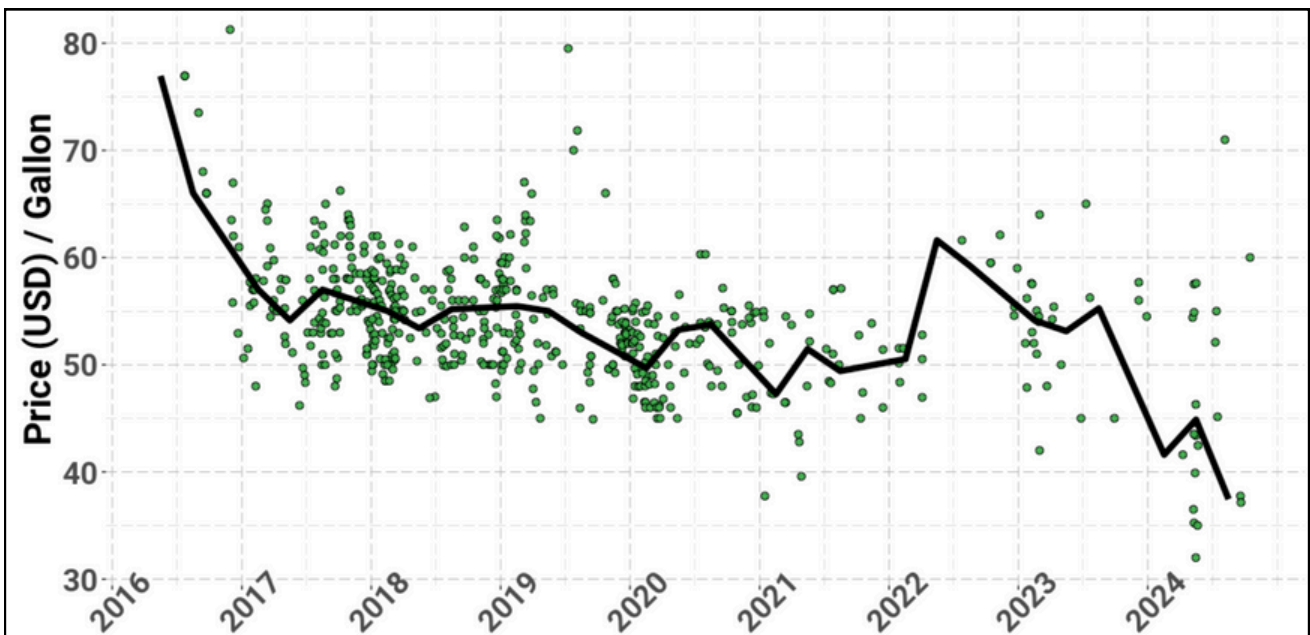
Dicamba provides a helpful representation of ag chem pricing seasonality. Prices typically drop in the fall before later increasing in-season, primarily driven by the cyclical dynamics of shipping logistics and global freight patterns. Preparation for the upcoming holiday season tends to increase shipping frequency and therefore shipping capacity for chem at that time of year, but pre-season purchasing in early spring fuels a rush on shipping when capacity is more limited, increasing overall costs.

State vs. National Price Trends



Dicamba prices are predicted to plateau in the 2025 season following a decreasing price trend over the past few years, with availability anticipated to remain stable.

Average Price Trends



ATRAZINE OUTLOOK

Price Expectation:
Stable

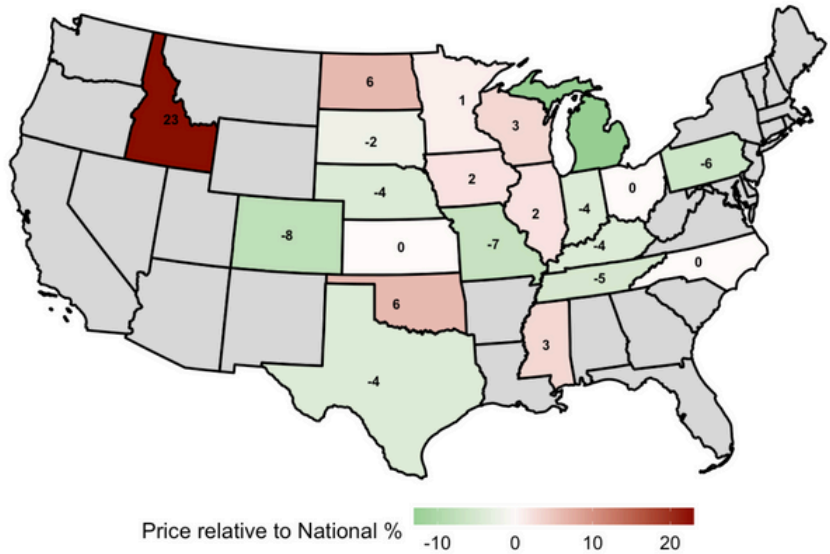
Supply Expectation:
Stable

Atrazine prices are expected to continue dropping as the herbicide slowly returns to pre-2022 pricing levels.

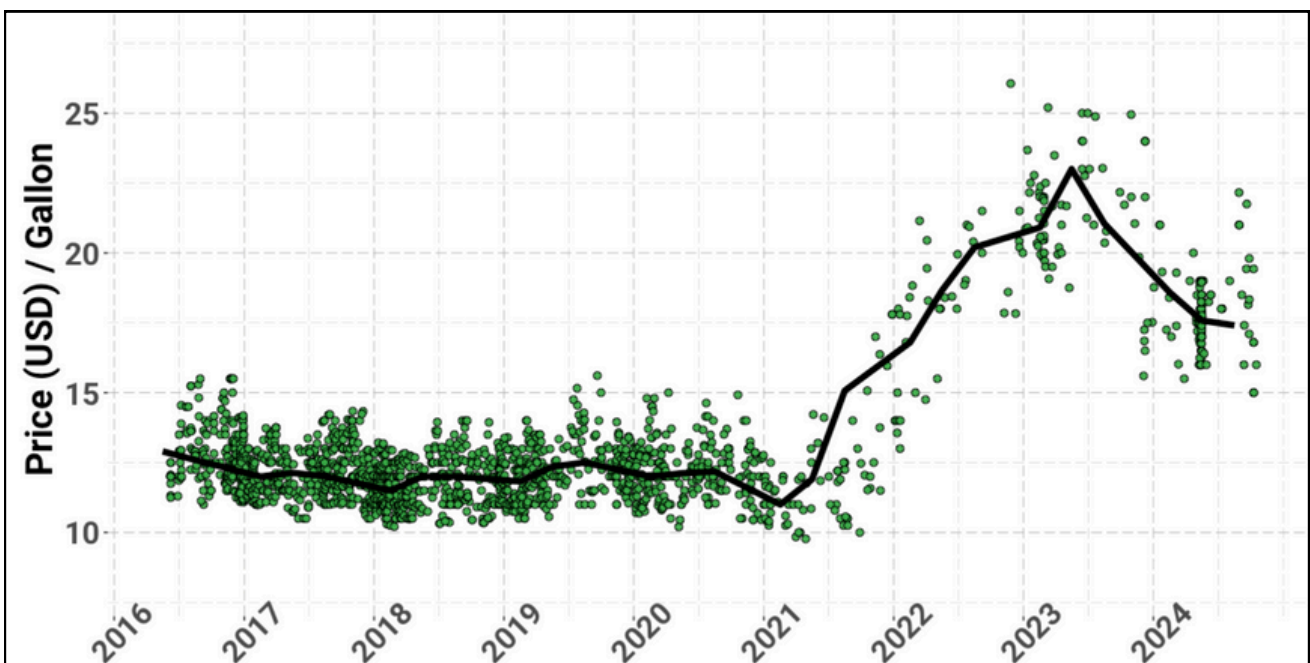
While member-submitted invoice data illustrates that atrazine prices are currently plateauing and have not yet returned to the original price range, atrazine still offers a strong relative crop protection value for the price.

Following a July 2024 EPA decision that increased the level at which atrazine is expected to adversely affect aquatic plants, the widely used herbicide now has a newly revised acceptable concentration of 9.7 micrograms per liter. Product usage may increase in light of this news, but is not expected to affect 2025 availability.

State vs. National Price Trends



Average Price Trends



S-METOLACHLOR OUTLOOK

Price Expectation:
Stable

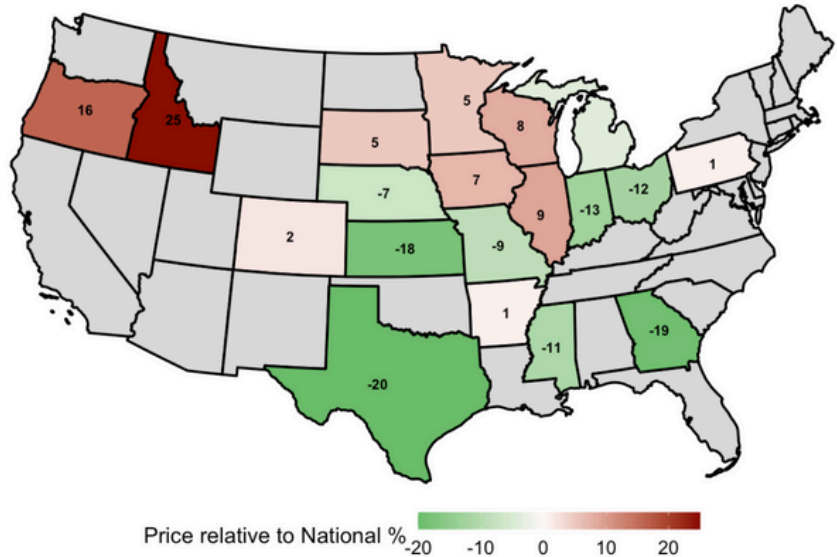
Supply Expectation:
Stable

While S-metolachlor prices appear to have some recent variability based on member-submitted invoice data, as illustrated in the graph below, costs have actually remained relatively consistent following an initial spike in 2022.

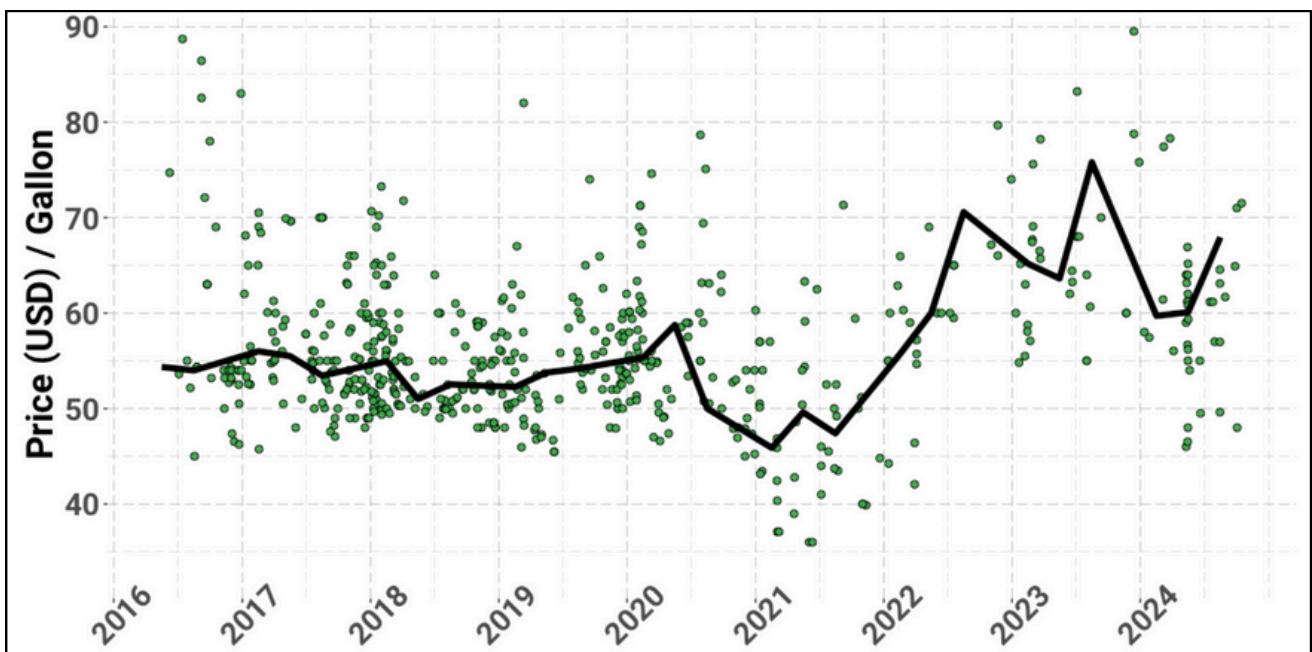
Although retail pricing appears somewhat volatile, actual product costs remain relatively stable; the dynamics of competitive marketplace are likely affecting these price trends.

Looking ahead to the 2025 season, anticipate prices for S-metolachlor will remain consistent with what we saw in the recent 2023 and 2024 seasons. Product availability is also expected to remain stable.

State vs. National Price Trends



Average Price Trends



GET EXCLUSIVE PRICE INSIGHTS

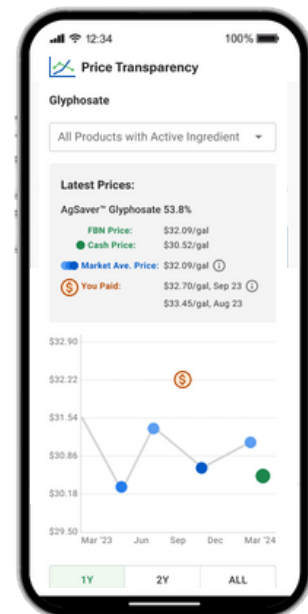
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Designed to help you make informed purchasing decisions, the FBN Price Transparency Tool lets you:

- See what other farmers are paying nationally
- Benchmark prices to compare against other local farms
- Track seasonal trends and see how prices change over time

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2. **Website:** Visit [our website](#) to upload your invoice online.



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GLYPHO 5

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