

Market Concentration Differs

Greater concentration among a small group of large global manufacturers in several U.S. crop protection markets may influence product availability, competition, and pricing.

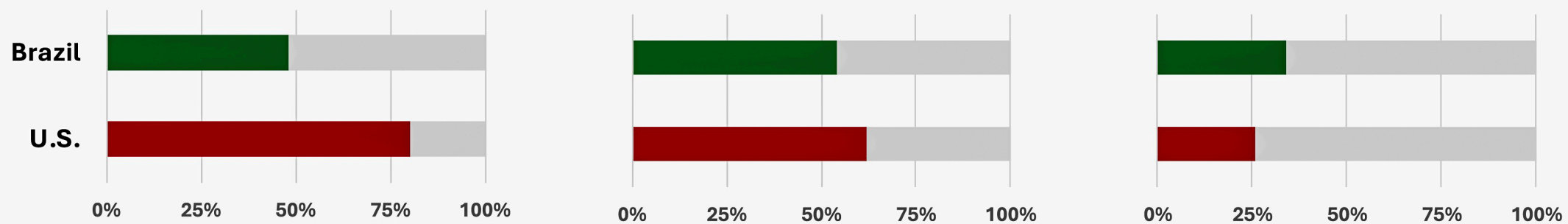
FUNGICIDE

HERBICIDE

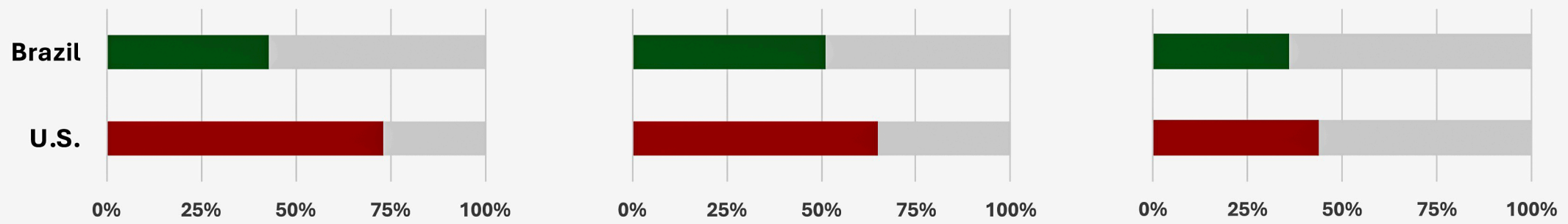
INSECTICIDE

Charts indicate the percent of product farmers purchased from the Top 5 Global R&D manufacturers for the **U.S.** and **Brazil**

CORN



SOYBEANS



Source: Premiums reflect Kynetec comparisons of farmer prices paid from 2023 to 2025 using their FarmTrak™ and sigma™ Seed farmer-panel data for the United States and Brazil, underlying price data are proprietary