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Global Contact Herbicides Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Contact Herbicides market size is expected to reach $ 12419 million by 2032, rising at a market growth of 5.5% CAGR during the forecast period (2026-2032).

Contact herbicides are formulated weed-control products that act primarily on the plant tissues directly covered by the spray, disrupting cell membranes, photosynthetic processes or nitrogen metabolism and causing rapid desiccation, necrosis and wilting. Major product groups include bipyridinium herbicides, glufosinate products, PPO inhibitors, selected photosystem II inhibitors and fatty-acid-based herbicides. Products may be non-selective or selective and are commonly supplied as soluble concentrates, suspension concentrates, emulsifiable concentrates and water-dispersible granules. Key upstream inputs include paraquat, diquat, glufosinate, L-glufosinate, carfentrazone-ethyl, flumioxazin, oxyfluorfen, bentazon and nonanoic acid technical materials, together with solvents, surfactants, adjuvants, antifoaming agents, stabilizers, water and packaging materials. Major downstream customers include field-crop growers, orchard and plantation operators, horticultural producers, agricultural service providers, non-crop vegetation managers and aquatic weed-control companies. Applications cover preplant burndown, post-emergence weed control, directed spraying, preharvest desiccation, non-crop vegetation management and aquatic weed control. On a finished-formulation basis, effective global capacity in 2025 is estimated at approximately 3.90 million metric tons, with sales of around 2.76 million metric tons and a weighted average ex-works price of approximately USD 3,010 per metric ton. The industry's overall gross margin is estimated at approximately 24%-39%.

Demand will continue to be supported by herbicide-resistant weeds, conservation tillage and preplant burndown requirements. As glyphosate resistance expands, growers need alternative modes of action including glufosinate, bipyridiniums and PPO inhibitors and

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increasingly use rotation or tank mixtures to reduce selection pressure. Contact herbicides provide rapid visible control and generally limited soil persistence, making them useful for preplant weed removal, directed orchard applications and preharvest desiccation. Their performance, however, is highly dependent on spray coverage, weed growth stage, temperature, light and carrier volume. Future growth is expected to be led by L-glufosinate, low-use-rate PPO products and resistance-management programs, while conventional commodity formulations should experience slower volume growth.

Formulation innovation will focus on spray adhesion, wetting, spreading, rainfastness and foliar uptake. Because contact herbicides have limited translocation, untreated growing points and underground plant structures may survive and produce regrowth. Suppliers will therefore place greater emphasis on specialized surfactants, oil-based adjuvants, humectants and droplet-management technologies. L-glufosinate uses the more biologically active isomer and can provide comparable or improved performance at lower active-ingredient loading. PPO inhibitors are expanding in burndown, selective broadleaf control and harvest-aid applications because of their rapid activity and low use rates. Fatty-acid and nonanoate products should gain selected opportunities in organic production, horticulture and public-area vegetation management, although their control of established perennial root systems remains limited.

Paraquat represents the largest regulatory uncertainty within the market. It remains a restricted-use pesticide in the United States and is prohibited or tightly controlled in a number of other countries. Syngenta has ceased paraquat production in 2026, meaning that Gramoxone should no longer be treated as a current long-term Syngenta production platform. However, numerous generic manufacturers continue to produce paraquat, and the company's withdrawal does not immediately eliminate the global market. Diquat, glufosinate and PPO inhibitors will capture part of the replacement demand, but differences in speed of action, root control, crop selectivity, cost and registration prevent complete one-for-one substitution.

The supply structure will increasingly combine Chinese scale advantages in generic active ingredients and formulations with the stronger registration and branding positions of multinational crop-protection companies. Chinese producers maintain integrated supply chains for paraquat, diquat, glufosinate and selected PPO active ingredients, while international suppliers compete through regional registrations, proprietary formulations, resistance-management programs and distribution services. Precision spot spraying and machine-vision application systems may reduce chemical volume per hectare, but they will also favor fast-acting contact formulations with strong droplet retention and predictable performance. Competitive advantage will increasingly depend

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on registration portfolios, formulation quality, mixture strategies, compatibility with digital application systems and reliable regional supply.

Report Scope

This report studies the global Contact Herbicides production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Contact Herbicides and provides market size (US$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Contact Herbicides that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Contact Herbicides total production and demand, 2021-2032, (Kilotons)

Global Contact Herbicides total production value, 2021-2032, (USD Million)

Global Contact Herbicides production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons), (based on production site)

Global Contact Herbicides consumption by region & country, CAGR, 2021-2032 & (Kilotons)

U.S. VS China: Contact Herbicides domestic production, consumption, key domestic manufacturers and share

Global Contact Herbicides production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Kilotons)

Global Contact Herbicides production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

Global Contact Herbicides production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Kilotons)

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This report profiles key players in the global Contact Herbicides market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Syngenta Group, BASF, FMC, Sumitomo Chemical, UPL, Nufarm, Albaugh, Gowan, Nihon Nohyaku, BioSafe Systems, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Contact Herbicides market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US$ Millions), volume (production, consumption) & (Kilotons) and average price (US$/Ton) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Contact Herbicides Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

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Global Contact Herbicides Market, Segmentation by Type:

Non-selective

Selective

Global Contact Herbicides Market, Segmentation by Primary Active Chemistry:

Bipyridinium Herbicides

Phosphinic Acid Herbicides

PPO Inhibitors

Photosystem II Inhibitors

Fatty Acid Herbicides

Other

Global Contact Herbicides Market, Segmentation by Formulation Type:

Soluble Concentrates

Suspension Concentrates

Emulsifiable Concentrates

Water-dispersible Granules

Other

Global Contact Herbicides Market, Segmentation by Application:

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Field Crops

Orchards and Plantations

Horticultural Crops

Other

Companies Profiled:

Syngenta Group

BASF

FMC

Sumitomo Chemical

UPL

Nufarm

Albaugh

Gowan

Nihon Nohyaku

BioSafe Systems

Rainbow Agro

Lier Chemical

Red Sun

Shandong Luba Chemical

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Key Questions Answered:

1. How big is the global Contact Herbicides market?
2. What is the demand of the global Contact Herbicides market?
3. What is the year over year growth of the global Contact Herbicides market?
4. What is the production and production value of the global Contact Herbicides market?
5. Who are the key producers in the global Contact Herbicides market?
6. What are the growth factors driving the market demand?

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