

Global Indaziflam Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Indaziflam market size is expected to reach \$ 497 million by 2032, rising at a market growth of 6.4% CAGR during the forecast period (2026-2032).

Indaziflam is a novel triazine-class herbicide developed by Bayer, functioning as a cellulose biosynthesis inhibitor (CBI) that controls a broad spectrum of annual grasses and broadleaf weeds through both pre-emergence and post-emergence activity. The active ingredient (CAS 950782-86-2) is characterized by its low-dose, high-efficacy profile, long residual activity, and unique mode of action that offers effective resistance management solutions against weeds resistant to conventional herbicide chemistries. The upstream segment comprises raw material suppliers (chemical intermediates, solvents, and specialty reagents) and technical-grade active ingredient manufacturers. The midstream segment involves formulation processors who convert technical-grade indaziflam (typically 95%+ purity) into end-user products such as suspension concentrates (SC), ready-to-use formulations, and combination products with other herbicides like glyphosate or isoxaflutole. The downstream segment encompasses distribution channels (agricultural cooperatives, retail agro-dealers) and end-users including high-value crop farmers (fruits, vegetables, vineyards, sugarcane), turf and ornamental managers, industrial vegetation management operators, and forestry services. The average ex-factory price for technical-grade indaziflam is US\$ 450,000 per ton, reflecting its complex chemical structure and high production barriers, with global sales volume reaching 0.69 thousand tons in 2025. Industry gross margins typically range between 25% and 35%, supported by the product's differentiated positioning and limited competition.

The global indaziflam market is undergoing a significant growth phase driven by several key trends. A primary factor shaping the industry is the increasing prevalence of

herbicide-resistant weed populations across major agricultural regions. As traditional herbicide chemistries lose efficacy, growers are seeking solutions with novel modes of action, positioning indaziflam as a valuable tool in resistance management programs. Another notable trend is the geographic expansion of indaziflam usage, particularly in emerging agricultural frontiers. Brazil's sugarcane fields represent the largest application area, where the product has demonstrated strong performance in controlling problematic weed species. The market is also witnessing a shift toward combination formulations, with products combining indaziflam with complementary herbicides such as glyphosate or isoxaflutole offering enhanced spectrum of control and convenience for end-users. Concurrently, regulatory developments and patent dynamics are reshaping the competitive landscape. With the compound patent approaching expiration, new generic entrants are preparing to enter the market, particularly in China where export-only technical registrations have been granted to domestic manufacturers. However, high barriers to entry stemming from the complex chemical structure and demanding production processes are expected to maintain the product's differentiated market positioning even after patent expiration. The market is also benefiting from the dual-channel operation strategy, where crop protection applications are managed by major agricultural companies while non-crop and public area applications are promoted through specialized channels, maximizing market coverage. Lastly, sustainability considerations are increasingly influencing adoption, as indaziflam's low-dose requirement and favorable environmental profile compared to older herbicide classes align with the global shift toward more sustainable agricultural practices.

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

This report is a detailed and comprehensive analysis of the world market for Indaziflam 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 Indaziflam that contribute to its increasing demand across many markets.

Highlights and key features of the study

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

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

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

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

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

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

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

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

This report profiles key players in the global Indaziflam 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 Bayer Crop Science, Envu, Shandong Weifang Rainbow Chemical Co., Ltd., Liaoning Cynda Agricultural Science Co., Ltd., 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 Indaziflam 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 Indaziflam Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Indaziflam Market, Segmentation by Type:

Single Dose

Mixed Dose

Global Indaziflam Market, Segmentation by Mode of Action:

Pre-Emergent

Post-Emergent

Pre- and Post-Emergent Combination

Global Indaziflam Market, Segmentation by Formulation Concentration:

Low Concentration (20%)

Global Indaziflam Market, Segmentation by Application:

Lawn

Fruit Trees

Other

Companies Profiled:

Bayer Crop Science

Envu

Shandong Weifang Rainbow Chemical Co., Ltd.

Liaoning Cynda Agricultural Science Co., Ltd.

Key Questions Answered:

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

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