

Global Metam Sodium Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Metam Sodium market size is expected to reach \$ 189 million by 2032, rising at a market growth of 2.5% CAGR during the forecast period (2026-2032).

Metam sodium is the sodium salt of methyl dithiocarbamic acid, a water-soluble organosulfur active that decomposes in moist soil to methyl isothiocyanate (MITC), providing broad-spectrum control of soil-borne fungi, nematodes, weed seeds, and some insects. It is supplied mainly as technical grade intermediate and high-strength aqueous solutions around 35 percent and 42 percent active ingredient, which are injected or chemigated into soil before planting. Upstream, production depends on carbon disulfide, methylamine, sodium hydroxide, and associated sulfur chemistry, with integrated agrochemical producers operating dedicated units for metam sodium or closely related dithiocarbamates. Downstream, the material is formulated, registered, and marketed as soil fumigants for high-value fruits and vegetables, field crops such as potatoes and carrots, and turf and ornamental uses through companies like Eastman, AMVAC, Limin, FMC, NovaSource, and Chinese specialists. Procurement is typically managed via long-term supply and formulation agreements with registrants in each country, under tight regulatory oversight for fumigant use conditions. At the raw active level, typical gross margins are around 23 percent, reflecting commodity-like input costs but meaningful barriers in process safety, environmental compliance, and fumigant registration, including extensive toxicology, field efficacy data, and stewardship obligations that limit new entrants and support incumbents' pricing power.

In the current market, global production is around 56,558 tonnes, with an average selling price of about 2,651 USD per tonne EXW basis. Revenue concentration is moderate to high: the top tier of suppliers—Eastman, AMVAC, Limin, FMC, NovaSource, and a handful of others—collectively capture roughly 65–75 percent of global value (CR5

roughly in the low-70s), based on published manufacturer value-share tables and regional production data. Metam sodium is described by regulators and agronomy literature as one of the most widely used soil fumigants in the United States and an important replacement or complement to methyl bromide in crops like potatoes, tomatoes, strawberries, onions and turfgrass. Demand is heavily skewed toward fruits and vegetables, with field crops and turf and ornamentals forming smaller but significant segments; Asia-Pacific (particularly China) is gaining share on the back of expanding protected horticulture, while North America remains the single largest mature market and Europe shows structurally lower volumes due to tighter restrictions and outright bans in some countries such as France.

Looking ahead to 2025–2031, most public forecasts imply low-single-digit nominal growth in value, with volumes broadly flat to slightly declining and prices drifting upward in line with stricter regulatory compliance costs and general inflation. Key positive drivers include continued need for economical broad-spectrum soil disinfestation where non-fumigant alternatives are either less effective or more expensive, particularly in intensive vegetable and strawberry systems, and the ongoing phase-down or restriction of legacy fumigants like methyl bromide which keeps metam sodium relevant in integrated soil-health programs. On the constraint side, the active faces mounting regulatory pressure over worker and bystander exposure, groundwater contamination, and emissions of MITC; authorities in Europe and parts of North America are tightening label conditions, withdrawing certain uses, or in some cases cancelling registrations altogether, creating downside risk for regional demand. Capacity additions announced in China, such as Limin's large metam-sodium project, should keep global supply adequate but will require sustained investment in waste-gas treatment and safety systems. At the same time, suppliers are experimenting with improved application technologies (drip and center-pivot chemigation, smart injection equipment) and digital decision-support tools that use farm data and, increasingly, AI-assisted pest-risk modeling to refine where and when fumigation is justified; these innovations are likely to shift metam sodium toward more targeted, stewardship-intensive use rather than pure volume growth, reinforcing the importance of technical service and regulatory compliance as sources of competitive advantage.

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

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

Highlights and key features of the study

Global Metam Sodium total production and demand, 2021-2032, (MT)

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

Global Metam Sodium production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (MT), (based on production site)

Global Metam Sodium consumption by region & country, CAGR, 2021-2032 & (MT)

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

Global Metam Sodium production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (MT)

Global Metam Sodium production by Concentration, production, value, CAGR, 2021-2032, (USD Million) & (MT)

Global Metam Sodium production by Application, production, value, CAGR, 2021-2032, (USD Million) & (MT)

This report profiles key players in the global Metam Sodium 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 Limin Chemical, AMVAC Chemical Corporation, Eastman Chemical Company, FMC Corporation, Tessenderlo Kerley Inc, Lainco S.A., Balchem Corporation, Shenyang Harvest Agrochemical Co., Ltd., Shandong Sino-Agri United Biotechnology 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 Metam Sodium market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (MT) and average price (USD/MT) by manufacturer, by Concentration, 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 Metam Sodium Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Metam Sodium Market, Segmentation by Concentration:

Metam Sodium 35%

Metam Sodium 42%

Others

Global Metam Sodium Market, Segmentation by Formulation:

Technical Grade

Formulated Product

Global Metam Sodium Market, Segmentation by Function:

Chemigation and Sprinkler Application

Shank Injection and Blade Application

Drip Irrigation Fumigation

Surface Spray With Mechanical Incorporation

Drench and Localized Treatment

Global Metam Sodium Market, Segmentation by Application:

Fruits and Vegetables

Cereals and Grains

Oilseeds and Pulses

Turfs and Ornamentals

Others

Companies Profiled:

Limin Chemical

AMVAC Chemical Corporation

Eastman Chemical Company

FMC Corporation

Tessenderlo Kerley Inc

Lainco S.A.

Balchem Corporation

Shenyang Harvest Agrochemical Co., Ltd.

Shandong Sino-Agri United Biotechnology Co., Ltd.

Key Questions Answered:

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

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