

# Global Pre-Emergent Weed Control Herbicide Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/G6D7D1301479EN.html>

Date: April 2026

Pages: 128

Price: US\$ 3,480.00 (Single User License)

ID: G6D7D1301479EN

## Abstracts

According to our (Global Info Research) latest study, the global Pre-Emergent Weed Control Herbicide market size was valued at US\$ 8489 million in 2025 and is forecast to a readjusted size of US\$ 12499 million by 2032 with a CAGR of 5.7% during review period.

Global shipments of pre-emergent weed control herbicide are projected to reach approximately 1.1 million tons by 2025. The average transaction price for mainstream active ingredient products used in corn, soybeans, rice, and orchard horticulture is estimated at around US\$7,500 per ton. This price range primarily corresponds to mainstream field crop formulations such as glyphosate alternatives to soil sealants, amides, triazines, and dinitroanilines, excluding high-end bio-based or specialty horticultural microcapsule slow-release products. In typical field crop cultivation, 2–5 kg of active ingredient per hectare is typically used for pre-emergence treatment. In large-scale corn or soybean farms, approximately one large boom sprayer is deployed for every 300–800 hectares of operating area. The cost of pre-emergence sealants accounts for approximately 8%–15% of the total planting input per season. Major demand sources include major corn and soybean producing areas, cotton planting bases, large-scale rice cultivation areas, orchard and nut orchard management systems, and urban greening and landscaping maintenance systems. North America and Latin America together account for approximately 48% of demand, with the United States and Brazil showing stable demand in chemical control systems with genetically modified crops. The Asia-Pacific region (China, India, and Southeast Asia) has seen significant growth driven by food security policies and the expansion of large-scale planting. Pre-emergent weed control herbicides are pesticide formulations applied after crop sowing but before weeds emerge. They inhibit weed seed germination or seedling

growth by forming a chemical barrier on the soil surface. Their core function is to block weed cell division and growth through root absorption or embryonic inhibition mechanisms, reducing competitive pressure in the field from the source. Compared to simple post-emergence weed control, pre-emergence treatment offers advantages such as reducing early weed competition, reducing the number of subsequent re-sprays, and minimizing manual intervention. Its agricultural engineering positioning is not simply that of a 'chemical weed control product,' but rather a fundamental unit in large-scale agricultural systems that achieves 'reduced labor and increased efficiency + stable yield + resistance management.' With rising global agricultural labor costs and the intensifying problem of resistant weeds, this product is evolving from a 'seasonal routine input' to a 'core tool for resistance management and stable yield management.'

### Supply Situation

Upstream supply mainly includes organic intermediate raw materials (aniline derivatives, chlorinated hydrocarbons), key active ingredient synthesis raw materials, emulsifiers and dispersants, microencapsulation materials, and high-density polyethylene packaging drums and composite bags. The synthesis cost of active ingredients typically accounts for 40%–55% of the total product BOM. Typical upstream suppliers include: BASF, Syngenta, Bayer Crop Science, Zhejiang Xinan Chemical, and Jiangsu Yangnong Chemical.

### Manufacturer Characteristics

BASF: Enhances multi-site mechanism combination herbicides to improve resistance management. Syngenta: Optimizes microencapsulated sustained-release formulations to extend soil effectiveness and reduce leaching risk. Bayer Crop Science: Promotes integration with digital agriculture platforms to achieve precision application recommendation models. Corteva Agriscience: Develops novel low-dose, highly active molecules to improve efficacy per unit area. FMC: Strengthens integration with genetically modified crops to form systematic weed control combinations.

### The Dilemma

The industry faces a predicament stemming from the combined effects of the spread of resistant weeds and increasingly stringent regulations: On the one hand, long-term use of single-mechanism herbicides has led to resistance in some grasses and broadleaf weeds to traditional triazine and amide products, forcing farmers to increase dosages or combine herbicides, thus raising costs; on the other hand, increasingly stringent

regulations in Europe and the US regarding soil residues, groundwater pollution, and ecotoxicological risks are putting pressure on some active ingredients to be restricted or replaced. Furthermore, fluctuating raw material prices, rising environmental production costs, and intense price competition in developing countries are putting pressure on profit margins, resulting in a multi-pressure landscape of 'high R&D investment + high regulatory barriers + price-sensitive end-users.'

### The Breakthrough Point

For manufacturers of pre-emergent weed control herbicides, the real breakthrough lies not in simply increasing the content of active ingredients or expanding sales networks, but in integrating multi-mechanism combinations, slow-release technology, and digital agricultural decision-making systems into resistance management solutions. For example, BASF has introduced multi-target compound structures in some of its products and optimized recommended dosages based on soil type and rainfall prediction models. Compared to traditional fixed-dose application methods, data-driven combination solutions can reduce the number of repeated applications and delay resistance development, upgrading the product from a 'single chemical input' to a 'crop lifecycle management tool,' becoming a key competitive advantage in the future.

### Applications

Pre-emergent weed control herbicides are mainly used in large-scale corn planting areas, major soybean producing areas, cotton and rapeseed planting bases, rice field management systems, and orchard and nut orchard management scenarios. Typical downstream customers include: Cargill, Archer Daniels Midland, COFCO, Louis Dreyfus Company, and Nutrien.

### Technology Trends

In terms of technology trends, this product is transitioning from a 'traditional soil sealant' to a 'precision resistance management platform.' Taking Syngenta as an example, it combines soil moisture monitoring and climate data models to develop a recommended application window algorithm and promotes upgrades to microencapsulated slow-release and low-volatility formulations. Future trends include the development of bioactive molecules, the design of low-residue, environmentally friendly formulations, and AI-based field weed prediction models. By integrating satellite remote sensing and agricultural machinery data, differentiated application of pesticides can be achieved on a plot-by-plot basis, thereby reducing ineffective inputs and improving yield per unit

area.

## Example

In a large Brazilian corn-growing cooperative's annual centralized agricultural input procurement project, BASF won the bid to provide a compound pre-emergence herbicide to replace single triazine products. The project required maintaining an effective weed suppression period of at least 30 days in tropical high-rainfall environments and connecting with the cooperative's digital agriculture platform to record application and yield data. This project demonstrates the 'core tool for yield assurance and resistance management' attribute of pre-emergence weed controllers in modern large-scale agricultural systems.

## Market Influencing Factors

The core influencing factors of the pre-emergent weed control herbicide market do not depend on the replacement cycle of a single product, but are closely related to global food price trends, the adoption rate of genetically modified crops, the spread of resistant weeds, and environmental regulatory policies. On the one hand, rising grain prices are driving farmers to increase yield-guaranteeing investments and raise the use of pre-emergence pre-emergence herbicides. On the other hand, climate change is extending weed growth cycles, increasing the demand for multiple rounds of control. Meanwhile, stricter environmental safety standards in the EU and North America are accelerating the phasing out of highly toxic and persistent products, prompting companies to increase R&D investment. It is worth noting that this market exhibits a high concentration of multinational agrochemical companies in patented molecules and high-end compound products, while Chinese and Indian companies possess economies of scale in generic products and cost control. Future competition will revolve around multi-mechanism combination capabilities, environmentally friendly formulation design, and digital agriculture system integration capabilities, rather than simply price competition. Overall, this industry possesses both agricultural necessity and policy-driven attributes, and its competitive essence is shifting from 'chemical component supply capabilities' to system-level capabilities in 'integrated crop management and data services.'

This report is a detailed and comprehensive analysis for global Pre-Emergent Weed Control Herbicide market. Both quantitative and qualitative analyses are presented by manufacturers, by region & country, by Type and by Application. As the market is constantly changing, this report explores the competition, supply and demand trends, as well as key factors that contribute to its changing demands across many markets.

Company profiles and product examples of selected competitors, along with market share estimates of some of the selected leaders for the year 2025, are provided.

### **Key Features:**

Global Pre-Emergent Weed Control Herbicide market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Pre-Emergent Weed Control Herbicide market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Pre-Emergent Weed Control Herbicide market size and forecasts, by Type and by Application, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Pre-Emergent Weed Control Herbicide market shares of main players, shipments in revenue (\$ Million), sales quantity (Kilotons), and ASP (US\$/Ton), 2021-2026

### **The Primary Objectives in This Report Are:**

- To determine the size of the total market opportunity of global and key countries
- To assess the growth potential for Pre-Emergent Weed Control Herbicide
- To forecast future growth in each product and end-use market
- To assess competitive factors affecting the marketplace

This report profiles key players in the global Pre-Emergent Weed Control Herbicide market based on the following parameters - company overview, sales quantity, revenue, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BASF, Syngenta, Bayer Crop Science, Corteva Agriscience, FMC, ADAMA, UPL, Nufarm, Albaugh, Sumitomo Chemical, etc.

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

### **Market Segmentation**

Pre-Emergent Weed Control Herbicide market is split by Type and by Application. For the period 2021-2032, the growth among segments provides accurate calculations and forecasts for consumption value by Type, and by Application in terms of volume and value. This analysis can help you expand your business by targeting qualified niche markets.

#### Market segment by Type

Glyphosate

Glufosinate

Others

#### Market segment by Dosage Form

Emulsifiable Concentrate

Suspension Concentrate

Water Dispersible Granules

Microencapsulated Suspension Concentrate

Others

#### Market segment by Residual Period

Within 30 Days

30–90 Days

>90 Days

#### Market segment by Application

Orchard

Lawn

Cornfield

Others

#### Major players covered

BASF

Syngenta

Bayer Crop Science

Corteva Agriscience

FMC

ADAMA

UPL

Nufarm

Albaugh

Sumitomo Chemical

Ishihara SangyoNutrien

Jiangsu Yangnong Chemical

Zhejiang Xinan Chemical

Valent

Nutrien

Zagro

Heben Pesticide

Agrowonderful Industrial

Belchim

Agricrown Biotech

Market segment by region, regional analysis covers

North America (United States, Canada, and Mexico)

Europe (Germany, France, United Kingdom, Russia, Italy, and Rest of Europe)

Asia-Pacific (China, Japan, Korea, India, Southeast Asia, and Australia)

South America (Brazil, Argentina, Colombia, and Rest of South America)

Middle East & Africa (Saudi Arabia, UAE, Egypt, South Africa, and Rest of Middle East & Africa)

**The content of the study subjects, includes a total of 15 chapters:**

Chapter 1, to describe Pre-Emergent Weed Control Herbicide product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Pre-Emergent Weed Control Herbicide, with price, sales quantity, revenue, and global market share of Pre-Emergent Weed Control Herbicide from 2021 to 2026.

Chapter 3, the Pre-Emergent Weed Control Herbicide competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Pre-Emergent Weed Control Herbicide breakdown data are shown at the regional level, to show the sales quantity, consumption value, and growth by regions, from 2021 to 2032.

Chapter 5 and 6, to segment the sales by Type and by Application, with sales market share and growth rate by Type, by Application, from 2021 to 2032.

Chapter 7, 8, 9, 10 and 11, to break the sales data at the country level, with sales quantity, consumption value, and market share for key countries in the world, from 2021 to 2026. and Pre-Emergent Weed Control Herbicide market forecast, by regions, by Type, and by Application, with sales and revenue, from 2027 to 2032.

Chapter 12, market dynamics, drivers, restraints, trends, and Porters Five Forces analysis.

Chapter 13, the key raw materials and key suppliers, and industry chain of Pre-Emergent Weed Control Herbicide.

Chapter 14 and 15, to describe Pre-Emergent Weed Control Herbicide sales channel, distributors, customers, research findings and conclusion.

## Contents

### 1 MARKET OVERVIEW

1.1 Product Overview and Scope

1.2 Market Estimation Caveats and Base Year

1.3 Market Analysis by Type

1.3.1 Overview: Global Pre-Emergent Weed Control Herbicide Consumption Value by Type: 2021 Versus 2025 Versus 2032

1.3.2 Glyphosate

1.3.3 Glufosinate

1.3.4 Others

1.4 Market Analysis by Dosage Form

1.4.1 Overview: Global Pre-Emergent Weed Control Herbicide Consumption Value by Dosage Form: 2021 Versus 2025 Versus 2032

1.4.2 Emulsifiable Concentrate

1.4.3 Suspension Concentrate

1.4.4 Water Dispersible Granules

1.4.5 Microencapsulated Suspension Concentrate

1.4.6 Others

1.5 Market Analysis by Residual Period

1.5.1 Overview: Global Pre-Emergent Weed Control Herbicide Consumption Value by Residual Period: 2021 Versus 2025 Versus 2032

1.5.2 Within 30 Days

1.5.3 30–90 Days

1.5.4 >90 Days

1.6 Market Analysis by Application

1.6.1 Overview: Global Pre-Emergent Weed Control Herbicide Consumption Value by Application: 2021 Versus 2025 Versus 2032

1.6.2 Orchard

1.6.3 Lawn

1.6.4 Cornfield

1.6.5 Others

1.7 Global Pre-Emergent Weed Control Herbicide Market Size & Forecast

1.7.1 Global Pre-Emergent Weed Control Herbicide Consumption Value (2021 & 2025 & 2032)

1.7.2 Global Pre-Emergent Weed Control Herbicide Sales Quantity (2021-2032)

1.7.3 Global Pre-Emergent Weed Control Herbicide Average Price (2021-2032)

## 2 MANUFACTURERS PROFILES

### 2.1 BASF

2.1.1 BASF Details

2.1.2 BASF Major Business

2.1.3 BASF Pre-Emergent Weed Control Herbicide Product and Services

2.1.4 BASF Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.1.5 BASF Recent Developments/Updates

### 2.2 Syngenta

2.2.1 Syngenta Details

2.2.2 Syngenta Major Business

2.2.3 Syngenta Pre-Emergent Weed Control Herbicide Product and Services

2.2.4 Syngenta Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.2.5 Syngenta Recent Developments/Updates

### 2.3 Bayer Crop Science

2.3.1 Bayer Crop Science Details

2.3.2 Bayer Crop Science Major Business

2.3.3 Bayer Crop Science Pre-Emergent Weed Control Herbicide Product and Services

2.3.4 Bayer Crop Science Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.3.5 Bayer Crop Science Recent Developments/Updates

### 2.4 Corteva Agriscience

2.4.1 Corteva Agriscience Details

2.4.2 Corteva Agriscience Major Business

2.4.3 Corteva Agriscience Pre-Emergent Weed Control Herbicide Product and Services

2.4.4 Corteva Agriscience Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.4.5 Corteva Agriscience Recent Developments/Updates

### 2.5 FMC

2.5.1 FMC Details

2.5.2 FMC Major Business

2.5.3 FMC Pre-Emergent Weed Control Herbicide Product and Services

2.5.4 FMC Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.5.5 FMC Recent Developments/Updates

## 2.6 ADAMA

### 2.6.1 ADAMA Details

### 2.6.2 ADAMA Major Business

### 2.6.3 ADAMA Pre-Emergent Weed Control Herbicide Product and Services

### 2.6.4 ADAMA Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.6.5 ADAMA Recent Developments/Updates

## 2.7 UPL

### 2.7.1 UPL Details

### 2.7.2 UPL Major Business

### 2.7.3 UPL Pre-Emergent Weed Control Herbicide Product and Services

### 2.7.4 UPL Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.7.5 UPL Recent Developments/Updates

## 2.8 Nufarm

### 2.8.1 Nufarm Details

### 2.8.2 Nufarm Major Business

### 2.8.3 Nufarm Pre-Emergent Weed Control Herbicide Product and Services

### 2.8.4 Nufarm Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.8.5 Nufarm Recent Developments/Updates

## 2.9 Albaugh

### 2.9.1 Albaugh Details

### 2.9.2 Albaugh Major Business

### 2.9.3 Albaugh Pre-Emergent Weed Control Herbicide Product and Services

### 2.9.4 Albaugh Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.9.5 Albaugh Recent Developments/Updates

## 2.10 Sumitomo Chemical

### 2.10.1 Sumitomo Chemical Details

### 2.10.2 Sumitomo Chemical Major Business

### 2.10.3 Sumitomo Chemical Pre-Emergent Weed Control Herbicide Product and Services

### 2.10.4 Sumitomo Chemical Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

### 2.10.5 Sumitomo Chemical Recent Developments/Updates

## 2.11 Ishihara SangyoNutrien

### 2.11.1 Ishihara SangyoNutrien Details

### 2.11.2 Ishihara SangyoNutrien Major Business

2.11.3 Ishihara SangyoNutrien Pre-Emergent Weed Control Herbicide Product and Services

2.11.4 Ishihara SangyoNutrien Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.11.5 Ishihara SangyoNutrien Recent Developments/Updates

2.12 Jiangsu Yangnong Chemical

2.12.1 Jiangsu Yangnong Chemical Details

2.12.2 Jiangsu Yangnong Chemical Major Business

2.12.3 Jiangsu Yangnong Chemical Pre-Emergent Weed Control Herbicide Product and Services

2.12.4 Jiangsu Yangnong Chemical Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.12.5 Jiangsu Yangnong Chemical Recent Developments/Updates

2.13 Zhejiang Xinan Chemical

2.13.1 Zhejiang Xinan Chemical Details

2.13.2 Zhejiang Xinan Chemical Major Business

2.13.3 Zhejiang Xinan Chemical Pre-Emergent Weed Control Herbicide Product and Services

2.13.4 Zhejiang Xinan Chemical Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.13.5 Zhejiang Xinan Chemical Recent Developments/Updates

2.14 Valent

2.14.1 Valent Details

2.14.2 Valent Major Business

2.14.3 Valent Pre-Emergent Weed Control Herbicide Product and Services

2.14.4 Valent Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.14.5 Valent Recent Developments/Updates

2.15 Nutrien

2.15.1 Nutrien Details

2.15.2 Nutrien Major Business

2.15.3 Nutrien Pre-Emergent Weed Control Herbicide Product and Services

2.15.4 Nutrien Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.15.5 Nutrien Recent Developments/Updates

2.16 Zagro

2.16.1 Zagro Details

2.16.2 Zagro Major Business

2.16.3 Zagro Pre-Emergent Weed Control Herbicide Product and Services

2.16.4 Zagro Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.16.5 Zagro Recent Developments/Updates

2.17 Heben Pesticide

2.17.1 Heben Pesticide Details

2.17.2 Heben Pesticide Major Business

2.17.3 Heben Pesticide Pre-Emergent Weed Control Herbicide Product and Services

2.17.4 Heben Pesticide Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.17.5 Heben Pesticide Recent Developments/Updates

2.18 Agrowonderful Industrial

2.18.1 Agrowonderful Industrial Details

2.18.2 Agrowonderful Industrial Major Business

2.18.3 Agrowonderful Industrial Pre-Emergent Weed Control Herbicide Product and Services

2.18.4 Agrowonderful Industrial Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.18.5 Agrowonderful Industrial Recent Developments/Updates

2.19 Belchim

2.19.1 Belchim Details

2.19.2 Belchim Major Business

2.19.3 Belchim Pre-Emergent Weed Control Herbicide Product and Services

2.19.4 Belchim Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.19.5 Belchim Recent Developments/Updates

2.20 Agricrown Biotech

2.20.1 Agricrown Biotech Details

2.20.2 Agricrown Biotech Major Business

2.20.3 Agricrown Biotech Pre-Emergent Weed Control Herbicide Product and Services

2.20.4 Agricrown Biotech Pre-Emergent Weed Control Herbicide Sales Quantity, Average Price, Revenue, Gross Margin and Market Share (2021-2026)

2.20.5 Agricrown Biotech Recent Developments/Updates

### **3 COMPETITIVE ENVIRONMENT: PRE-EMERGENT WEED CONTROL HERBICIDE BY MANUFACTURER**

3.1 Global Pre-Emergent Weed Control Herbicide Sales Quantity by Manufacturer (2021-2026)

3.2 Global Pre-Emergent Weed Control Herbicide Revenue by Manufacturer

(2021-2026)

3.3 Global Pre-Emergent Weed Control Herbicide Average Price by Manufacturer (2021-2026)

3.4 Market Share Analysis (2025)

3.4.1 Producer Shipments of Pre-Emergent Weed Control Herbicide by Manufacturer Revenue (\$MM) and Market Share (%): 2025

3.4.2 Top 3 Pre-Emergent Weed Control Herbicide Manufacturer Market Share in 2025

3.4.3 Top 6 Pre-Emergent Weed Control Herbicide Manufacturer Market Share in 2025

3.5 Pre-Emergent Weed Control Herbicide Market: Overall Company Footprint Analysis

3.5.1 Pre-Emergent Weed Control Herbicide Market: Region Footprint

3.5.2 Pre-Emergent Weed Control Herbicide Market: Company Product Type Footprint

3.5.3 Pre-Emergent Weed Control Herbicide Market: Company Product Application Footprint

3.6 New Market Entrants and Barriers to Market Entry

3.7 Mergers, Acquisition, Agreements, and Collaborations

## **4 CONSUMPTION ANALYSIS BY REGION**

4.1 Global Pre-Emergent Weed Control Herbicide Market Size by Region

4.1.1 Global Pre-Emergent Weed Control Herbicide Sales Quantity by Region (2021-2032)

4.1.2 Global Pre-Emergent Weed Control Herbicide Consumption Value by Region (2021-2032)

4.1.3 Global Pre-Emergent Weed Control Herbicide Average Price by Region (2021-2032)

4.2 North America Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032)

4.3 Europe Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032)

4.4 Asia-Pacific Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032)

4.5 South America Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032)

4.6 Middle East & Africa Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032)

## **5 MARKET SEGMENT BY TYPE**

- 5.1 Global Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2032)
- 5.2 Global Pre-Emergent Weed Control Herbicide Consumption Value by Type (2021-2032)
- 5.3 Global Pre-Emergent Weed Control Herbicide Average Price by Type (2021-2032)

## **6 MARKET SEGMENT BY APPLICATION**

- 6.1 Global Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2032)
- 6.2 Global Pre-Emergent Weed Control Herbicide Consumption Value by Application (2021-2032)
- 6.3 Global Pre-Emergent Weed Control Herbicide Average Price by Application (2021-2032)

## **7 NORTH AMERICA**

- 7.1 North America Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2032)
- 7.2 North America Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2032)
- 7.3 North America Pre-Emergent Weed Control Herbicide Market Size by Country
  - 7.3.1 North America Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2032)
  - 7.3.2 North America Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2032)
  - 7.3.3 United States Market Size and Forecast (2021-2032)
  - 7.3.4 Canada Market Size and Forecast (2021-2032)
  - 7.3.5 Mexico Market Size and Forecast (2021-2032)

## **8 EUROPE**

- 8.1 Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2032)
- 8.2 Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2032)
- 8.3 Europe Pre-Emergent Weed Control Herbicide Market Size by Country
  - 8.3.1 Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2032)
  - 8.3.2 Europe Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2032)

- 8.3.3 Germany Market Size and Forecast (2021-2032)
- 8.3.4 France Market Size and Forecast (2021-2032)
- 8.3.5 United Kingdom Market Size and Forecast (2021-2032)
- 8.3.6 Russia Market Size and Forecast (2021-2032)
- 8.3.7 Italy Market Size and Forecast (2021-2032)

## **9 ASIA-PACIFIC**

- 9.1 Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2032)
- 9.2 Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2032)
- 9.3 Asia-Pacific Pre-Emergent Weed Control Herbicide Market Size by Region
  - 9.3.1 Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Region (2021-2032)
  - 9.3.2 Asia-Pacific Pre-Emergent Weed Control Herbicide Consumption Value by Region (2021-2032)
  - 9.3.3 China Market Size and Forecast (2021-2032)
  - 9.3.4 Japan Market Size and Forecast (2021-2032)
  - 9.3.5 South Korea Market Size and Forecast (2021-2032)
  - 9.3.6 India Market Size and Forecast (2021-2032)
  - 9.3.7 Southeast Asia Market Size and Forecast (2021-2032)
  - 9.3.8 Australia Market Size and Forecast (2021-2032)

## **10 SOUTH AMERICA**

- 10.1 South America Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2032)
- 10.2 South America Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2032)
- 10.3 South America Pre-Emergent Weed Control Herbicide Market Size by Country
  - 10.3.1 South America Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2032)
  - 10.3.2 South America Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2032)
  - 10.3.3 Brazil Market Size and Forecast (2021-2032)
  - 10.3.4 Argentina Market Size and Forecast (2021-2032)

## **11 MIDDLE EAST & AFRICA**

11.1 Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2032)

11.2 Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2032)

11.3 Middle East & Africa Pre-Emergent Weed Control Herbicide Market Size by Country

11.3.1 Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2032)

11.3.2 Middle East & Africa Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2032)

11.3.3 Turkey Market Size and Forecast (2021-2032)

11.3.4 Egypt Market Size and Forecast (2021-2032)

11.3.5 Saudi Arabia Market Size and Forecast (2021-2032)

11.3.6 South Africa Market Size and Forecast (2021-2032)

## **12 MARKET DYNAMICS**

12.1 Pre-Emergent Weed Control Herbicide Market Drivers

12.2 Pre-Emergent Weed Control Herbicide Market Restraints

12.3 Pre-Emergent Weed Control Herbicide Trends Analysis

12.4 Porters Five Forces Analysis

12.4.1 Threat of New Entrants

12.4.2 Bargaining Power of Suppliers

12.4.3 Bargaining Power of Buyers

12.4.4 Threat of Substitutes

12.4.5 Competitive Rivalry

## **13 RAW MATERIAL AND INDUSTRY CHAIN**

13.1 Raw Material of Pre-Emergent Weed Control Herbicide and Key Manufacturers

13.2 Manufacturing Costs Percentage of Pre-Emergent Weed Control Herbicide

13.3 Pre-Emergent Weed Control Herbicide Production Process

13.4 Industry Value Chain Analysis

## **14 SHIPMENTS BY DISTRIBUTION CHANNEL**

14.1 Sales Channel

14.1.1 Direct to End-User

14.1.2 Distributors

14.2 Pre-Emergent Weed Control Herbicide Typical Distributors

14.3 Pre-Emergent Weed Control Herbicide Typical Customers

## **15 RESEARCH FINDINGS AND CONCLUSION**

## **16 APPENDIX**

16.1 Methodology

16.2 Research Process and Data Source

16.3 Disclaimer

## List Of Tables

### LIST OF TABLES

- Table 1. Global Pre-Emergent Weed Control Herbicide Consumption Value by Type, (USD Million), 2021 & 2025 & 2032
- Table 2. Global Pre-Emergent Weed Control Herbicide Consumption Value by Dosage Form, (USD Million), 2021 & 2025 & 2032
- Table 3. Global Pre-Emergent Weed Control Herbicide Consumption Value by Residual Period, (USD Million), 2021 & 2025 & 2032
- Table 4. Global Pre-Emergent Weed Control Herbicide Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Table 5. BASF Basic Information, Manufacturing Base and Competitors
- Table 6. BASF Major Business
- Table 7. BASF Pre-Emergent Weed Control Herbicide Product and Services
- Table 8. BASF Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 9. BASF Recent Developments/Updates
- Table 10. Syngenta Basic Information, Manufacturing Base and Competitors
- Table 11. Syngenta Major Business
- Table 12. Syngenta Pre-Emergent Weed Control Herbicide Product and Services
- Table 13. Syngenta Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 14. Syngenta Recent Developments/Updates
- Table 15. Bayer Crop Science Basic Information, Manufacturing Base and Competitors
- Table 16. Bayer Crop Science Major Business
- Table 17. Bayer Crop Science Pre-Emergent Weed Control Herbicide Product and Services
- Table 18. Bayer Crop Science Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 19. Bayer Crop Science Recent Developments/Updates
- Table 20. Corteva Agriscience Basic Information, Manufacturing Base and Competitors
- Table 21. Corteva Agriscience Major Business
- Table 22. Corteva Agriscience Pre-Emergent Weed Control Herbicide Product and Services
- Table 23. Corteva Agriscience Pre-Emergent Weed Control Herbicide Sales Quantity

(Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 24. Corteva Agriscience Recent Developments/Updates

Table 25. FMC Basic Information, Manufacturing Base and Competitors

Table 26. FMC Major Business

Table 27. FMC Pre-Emergent Weed Control Herbicide Product and Services

Table 28. FMC Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 29. FMC Recent Developments/Updates

Table 30. ADAMA Basic Information, Manufacturing Base and Competitors

Table 31. ADAMA Major Business

Table 32. ADAMA Pre-Emergent Weed Control Herbicide Product and Services

Table 33. ADAMA Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 34. ADAMA Recent Developments/Updates

Table 35. UPL Basic Information, Manufacturing Base and Competitors

Table 36. UPL Major Business

Table 37. UPL Pre-Emergent Weed Control Herbicide Product and Services

Table 38. UPL Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 39. UPL Recent Developments/Updates

Table 40. Nufarm Basic Information, Manufacturing Base and Competitors

Table 41. Nufarm Major Business

Table 42. Nufarm Pre-Emergent Weed Control Herbicide Product and Services

Table 43. Nufarm Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 44. Nufarm Recent Developments/Updates

Table 45. Albaugh Basic Information, Manufacturing Base and Competitors

Table 46. Albaugh Major Business

Table 47. Albaugh Pre-Emergent Weed Control Herbicide Product and Services

Table 48. Albaugh Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 49. Albaugh Recent Developments/Updates

Table 50. Sumitomo Chemical Basic Information, Manufacturing Base and Competitors

Table 51. Sumitomo Chemical Major Business

Table 52. Sumitomo Chemical Pre-Emergent Weed Control Herbicide Product and Services

Table 53. Sumitomo Chemical Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 54. Sumitomo Chemical Recent Developments/Updates

Table 55. Ishihara SangyoNutrien Basic Information, Manufacturing Base and Competitors

Table 56. Ishihara SangyoNutrien Major Business

Table 57. Ishihara SangyoNutrien Pre-Emergent Weed Control Herbicide Product and Services

Table 58. Ishihara SangyoNutrien Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 59. Ishihara SangyoNutrien Recent Developments/Updates

Table 60. Jiangsu Yangnong Chemical Basic Information, Manufacturing Base and Competitors

Table 61. Jiangsu Yangnong Chemical Major Business

Table 62. Jiangsu Yangnong Chemical Pre-Emergent Weed Control Herbicide Product and Services

Table 63. Jiangsu Yangnong Chemical Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 64. Jiangsu Yangnong Chemical Recent Developments/Updates

Table 65. Zhejiang Xinan Chemical Basic Information, Manufacturing Base and Competitors

Table 66. Zhejiang Xinan Chemical Major Business

Table 67. Zhejiang Xinan Chemical Pre-Emergent Weed Control Herbicide Product and Services

Table 68. Zhejiang Xinan Chemical Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 69. Zhejiang Xinan Chemical Recent Developments/Updates

Table 70. Valent Basic Information, Manufacturing Base and Competitors

Table 71. Valent Major Business

Table 72. Valent Pre-Emergent Weed Control Herbicide Product and Services

Table 73. Valent Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share

(2021-2026)

Table 74. Valent Recent Developments/Updates

Table 75. Nutrien Basic Information, Manufacturing Base and Competitors

Table 76. Nutrien Major Business

Table 77. Nutrien Pre-Emergent Weed Control Herbicide Product and Services

Table 78. Nutrien Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 79. Nutrien Recent Developments/Updates

Table 80. Zagro Basic Information, Manufacturing Base and Competitors

Table 81. Zagro Major Business

Table 82. Zagro Pre-Emergent Weed Control Herbicide Product and Services

Table 83. Zagro Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Zagro Recent Developments/Updates

Table 85. Heben Pesticide Basic Information, Manufacturing Base and Competitors

Table 86. Heben Pesticide Major Business

Table 87. Heben Pesticide Pre-Emergent Weed Control Herbicide Product and Services

Table 88. Heben Pesticide Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 89. Heben Pesticide Recent Developments/Updates

Table 90. Agrowonderful Industrial Basic Information, Manufacturing Base and Competitors

Table 91. Agrowonderful Industrial Major Business

Table 92. Agrowonderful Industrial Pre-Emergent Weed Control Herbicide Product and Services

Table 93. Agrowonderful Industrial Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 94. Agrowonderful Industrial Recent Developments/Updates

Table 95. Belchim Basic Information, Manufacturing Base and Competitors

Table 96. Belchim Major Business

Table 97. Belchim Pre-Emergent Weed Control Herbicide Product and Services

Table 98. Belchim Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)

Table 99. Belchim Recent Developments/Updates

- Table 100. Agricrown Biotech Basic Information, Manufacturing Base and Competitors
- Table 101. Agricrown Biotech Major Business
- Table 102. Agricrown Biotech Pre-Emergent Weed Control Herbicide Product and Services
- Table 103. Agricrown Biotech Pre-Emergent Weed Control Herbicide Sales Quantity (Kilotons), Average Price (US\$/Ton), Revenue (USD Million), Gross Margin and Market Share (2021-2026)
- Table 104. Agricrown Biotech Recent Developments/Updates
- Table 105. Global Pre-Emergent Weed Control Herbicide Sales Quantity by Manufacturer (2021-2026) & (Kilotons)
- Table 106. Global Pre-Emergent Weed Control Herbicide Revenue by Manufacturer (2021-2026) & (USD Million)
- Table 107. Global Pre-Emergent Weed Control Herbicide Average Price by Manufacturer (2021-2026) & (US\$/Ton)
- Table 108. Market Position of Manufacturers in Pre-Emergent Weed Control Herbicide, (Tier 1, Tier 2, and Tier 3), Based on Revenue in 2025
- Table 109. Head Office and Pre-Emergent Weed Control Herbicide Production Site of Key Manufacturer
- Table 110. Pre-Emergent Weed Control Herbicide Market: Company Product Type Footprint
- Table 111. Pre-Emergent Weed Control Herbicide Market: Company Product Application Footprint
- Table 112. Pre-Emergent Weed Control Herbicide New Market Entrants and Barriers to Market Entry
- Table 113. Pre-Emergent Weed Control Herbicide Mergers, Acquisition, Agreements, and Collaborations
- Table 114. Global Pre-Emergent Weed Control Herbicide Consumption Value by Region (2021-2025-2032) & (USD Million) & CAGR
- Table 115. Global Pre-Emergent Weed Control Herbicide Sales Quantity by Region (2021-2026) & (Kilotons)
- Table 116. Global Pre-Emergent Weed Control Herbicide Sales Quantity by Region (2027-2032) & (Kilotons)
- Table 117. Global Pre-Emergent Weed Control Herbicide Consumption Value by Region (2021-2026) & (USD Million)
- Table 118. Global Pre-Emergent Weed Control Herbicide Consumption Value by Region (2027-2032) & (USD Million)
- Table 119. Global Pre-Emergent Weed Control Herbicide Average Price by Region (2021-2026) & (US\$/Ton)
- Table 120. Global Pre-Emergent Weed Control Herbicide Average Price by Region

(2027-2032) & (US\$/Ton)

Table 121. Global Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2026) & (Kilotons)

Table 122. Global Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2027-2032) & (Kilotons)

Table 123. Global Pre-Emergent Weed Control Herbicide Consumption Value by Type (2021-2026) & (USD Million)

Table 124. Global Pre-Emergent Weed Control Herbicide Consumption Value by Type (2027-2032) & (USD Million)

Table 125. Global Pre-Emergent Weed Control Herbicide Average Price by Type (2021-2026) & (US\$/Ton)

Table 126. Global Pre-Emergent Weed Control Herbicide Average Price by Type (2027-2032) & (US\$/Ton)

Table 127. Global Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2026) & (Kilotons)

Table 128. Global Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2027-2032) & (Kilotons)

Table 129. Global Pre-Emergent Weed Control Herbicide Consumption Value by Application (2021-2026) & (USD Million)

Table 130. Global Pre-Emergent Weed Control Herbicide Consumption Value by Application (2027-2032) & (USD Million)

Table 131. Global Pre-Emergent Weed Control Herbicide Average Price by Application (2021-2026) & (US\$/Ton)

Table 132. Global Pre-Emergent Weed Control Herbicide Average Price by Application (2027-2032) & (US\$/Ton)

Table 133. North America Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2026) & (Kilotons)

Table 134. North America Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2027-2032) & (Kilotons)

Table 135. North America Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2026) & (Kilotons)

Table 136. North America Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2027-2032) & (Kilotons)

Table 137. North America Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2026) & (Kilotons)

Table 138. North America Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2027-2032) & (Kilotons)

Table 139. North America Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2026) & (USD Million)

Table 140. North America Pre-Emergent Weed Control Herbicide Consumption Value by Country (2027-2032) & (USD Million)

Table 141. Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2026) & (Kilotons)

Table 142. Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2027-2032) & (Kilotons)

Table 143. Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2026) & (Kilotons)

Table 144. Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2027-2032) & (Kilotons)

Table 145. Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2026) & (Kilotons)

Table 146. Europe Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2027-2032) & (Kilotons)

Table 147. Europe Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2026) & (USD Million)

Table 148. Europe Pre-Emergent Weed Control Herbicide Consumption Value by Country (2027-2032) & (USD Million)

Table 149. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2026) & (Kilotons)

Table 150. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2027-2032) & (Kilotons)

Table 151. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2026) & (Kilotons)

Table 152. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2027-2032) & (Kilotons)

Table 153. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Region (2021-2026) & (Kilotons)

Table 154. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity by Region (2027-2032) & (Kilotons)

Table 155. Asia-Pacific Pre-Emergent Weed Control Herbicide Consumption Value by Region (2021-2026) & (USD Million)

Table 156. Asia-Pacific Pre-Emergent Weed Control Herbicide Consumption Value by Region (2027-2032) & (USD Million)

Table 157. South America Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2026) & (Kilotons)

Table 158. South America Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2027-2032) & (Kilotons)

Table 159. South America Pre-Emergent Weed Control Herbicide Sales Quantity by

Application (2021-2026) & (Kilotons)

Table 160. South America Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2027-2032) & (Kilotons)

Table 161. South America Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2026) & (Kilotons)

Table 162. South America Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2027-2032) & (Kilotons)

Table 163. South America Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2026) & (USD Million)

Table 164. South America Pre-Emergent Weed Control Herbicide Consumption Value by Country (2027-2032) & (USD Million)

Table 165. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2021-2026) & (Kilotons)

Table 166. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Type (2027-2032) & (Kilotons)

Table 167. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2021-2026) & (Kilotons)

Table 168. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Application (2027-2032) & (Kilotons)

Table 169. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2021-2026) & (Kilotons)

Table 170. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity by Country (2027-2032) & (Kilotons)

Table 171. Middle East & Africa Pre-Emergent Weed Control Herbicide Consumption Value by Country (2021-2026) & (USD Million)

Table 172. Middle East & Africa Pre-Emergent Weed Control Herbicide Consumption Value by Country (2027-2032) & (USD Million)

Table 173. Pre-Emergent Weed Control Herbicide Raw Material

Table 174. Key Manufacturers of Pre-Emergent Weed Control Herbicide Raw Materials

Table 175. Pre-Emergent Weed Control Herbicide Typical Distributors

Table 176. Pre-Emergent Weed Control Herbicide Typical Customers

## List Of Figures

### LIST OF FIGURES

- Figure 1. Pre-Emergent Weed Control Herbicide Picture
- Figure 2. Global Pre-Emergent Weed Control Herbicide Revenue by Type, (USD Million), 2021 & 2025 & 2032
- Figure 3. Global Pre-Emergent Weed Control Herbicide Revenue Market Share by Type in 2025
- Figure 4. Glyphosate Examples
- Figure 5. Glufosinate Examples
- Figure 6. Others Examples
- Figure 7. Global Pre-Emergent Weed Control Herbicide Revenue by Dosage Form, (USD Million), 2021 & 2025 & 2032
- Figure 8. Global Pre-Emergent Weed Control Herbicide Revenue Market Share by Dosage Form in 2025
- Figure 9. Emulsifiable Concentrate Examples
- Figure 10. Suspension Concentrate Examples
- Figure 11. Water Dispersible Granules Examples
- Figure 12. Microencapsulated Suspension Concentrate Examples
- Figure 13. Others Examples
- Figure 14. Global Pre-Emergent Weed Control Herbicide Revenue by Residual Period, (USD Million), 2021 & 2025 & 2032
- Figure 15. Global Pre-Emergent Weed Control Herbicide Revenue Market Share by Residual Period in 2025
- Figure 16. Within 30 Days Examples
- Figure 17. 30–90 Days Examples
- Figure 18. >90 Days Examples
- Figure 19. Global Pre-Emergent Weed Control Herbicide Consumption Value by Application, (USD Million), 2021 & 2025 & 2032
- Figure 20. Global Pre-Emergent Weed Control Herbicide Revenue Market Share by Application in 2025
- Figure 21. Orchard Examples
- Figure 22. Lawn Examples
- Figure 23. Cornfield Examples
- Figure 24. Others Examples
- Figure 25. Global Pre-Emergent Weed Control Herbicide Consumption Value, (USD Million): 2021 & 2025 & 2032
- Figure 26. Global Pre-Emergent Weed Control Herbicide Consumption Value and

Forecast (2021-2032) & (USD Million)

Figure 27. Global Pre-Emergent Weed Control Herbicide Sales Quantity (2021-2032) & (Kilotons)

Figure 28. Global Pre-Emergent Weed Control Herbicide Price (2021-2032) & (US\$/Ton)

Figure 29. Global Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Manufacturer in 2025

Figure 30. Global Pre-Emergent Weed Control Herbicide Revenue Market Share by Manufacturer in 2025

Figure 31. Producer Shipments of Pre-Emergent Weed Control Herbicide by Manufacturer Sales (\$MM) and Market Share (%): 2025

Figure 32. Top 3 Pre-Emergent Weed Control Herbicide Manufacturer (Revenue) Market Share in 2025

Figure 33. Top 6 Pre-Emergent Weed Control Herbicide Manufacturer (Revenue) Market Share in 2025

Figure 34. Global Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Region (2021-2032)

Figure 35. Global Pre-Emergent Weed Control Herbicide Consumption Value Market Share by Region (2021-2032)

Figure 36. North America Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 37. Europe Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 38. Asia-Pacific Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 39. South America Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 40. Middle East & Africa Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 41. Global Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Type (2021-2032)

Figure 42. Global Pre-Emergent Weed Control Herbicide Consumption Value Market Share by Type (2021-2032)

Figure 43. Global Pre-Emergent Weed Control Herbicide Average Price by Type (2021-2032) & (US\$/Ton)

Figure 44. Global Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Application (2021-2032)

Figure 45. Global Pre-Emergent Weed Control Herbicide Revenue Market Share by Application (2021-2032)

Figure 46. Global Pre-Emergent Weed Control Herbicide Average Price by Application (2021-2032) & (US\$/Ton)

Figure 47. North America Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Type (2021-2032)

Figure 48. North America Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Application (2021-2032)

Figure 49. North America Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Country (2021-2032)

Figure 50. North America Pre-Emergent Weed Control Herbicide Consumption Value Market Share by Country (2021-2032)

Figure 51. United States Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 52. Canada Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 53. Mexico Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 54. Europe Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Type (2021-2032)

Figure 55. Europe Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Application (2021-2032)

Figure 56. Europe Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Country (2021-2032)

Figure 57. Europe Pre-Emergent Weed Control Herbicide Consumption Value Market Share by Country (2021-2032)

Figure 58. Germany Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 59. France Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 60. United Kingdom Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 61. Russia Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 62. Italy Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 63. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Type (2021-2032)

Figure 64. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity Market Share by Application (2021-2032)

Figure 65. Asia-Pacific Pre-Emergent Weed Control Herbicide Sales Quantity Market

Share by Region (2021-2032)

Figure 66. Asia-Pacific Pre-Emergent Weed Control Herbicide Consumption Value

Market Share by Region (2021-2032)

Figure 67. China Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 68. Japan Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 69. South Korea Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 70. India Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 71. Southeast Asia Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 72. Australia Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 73. South America Pre-Emergent Weed Control Herbicide Sales Quantity Market  
Share by Type (2021-2032)

Figure 74. South America Pre-Emergent Weed Control Herbicide Sales Quantity Market  
Share by Application (2021-2032)

Figure 75. South America Pre-Emergent Weed Control Herbicide Sales Quantity Market  
Share by Country (2021-2032)

Figure 76. South America Pre-Emergent Weed Control Herbicide Consumption Value  
Market Share by Country (2021-2032)

Figure 77. Brazil Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 78. Argentina Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 79. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity  
Market Share by Type (2021-2032)

Figure 80. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity  
Market Share by Application (2021-2032)

Figure 81. Middle East & Africa Pre-Emergent Weed Control Herbicide Sales Quantity  
Market Share by Country (2021-2032)

Figure 82. Middle East & Africa Pre-Emergent Weed Control Herbicide Consumption  
Value Market Share by Country (2021-2032)

Figure 83. Turkey Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 84. Egypt Pre-Emergent Weed Control Herbicide Consumption Value  
(2021-2032) & (USD Million)

Figure 85. Saudi Arabia Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 86. South Africa Pre-Emergent Weed Control Herbicide Consumption Value (2021-2032) & (USD Million)

Figure 87. Pre-Emergent Weed Control Herbicide Market Drivers

Figure 88. Pre-Emergent Weed Control Herbicide Market Restraints

Figure 89. Pre-Emergent Weed Control Herbicide Market Trends

Figure 90. Porters Five Forces Analysis

Figure 91. Manufacturing Cost Structure Analysis of Pre-Emergent Weed Control Herbicide in 2025

Figure 92. Manufacturing Process Analysis of Pre-Emergent Weed Control Herbicide

Figure 93. Pre-Emergent Weed Control Herbicide Industrial Chain

Figure 94. Sales Channel: Direct to End-User vs Distributors

Figure 95. Direct Channel Pros & Cons

Figure 96. Indirect Channel Pros & Cons

Figure 97. Methodology

Figure 98. Research Process and Data Source

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