

Global Soil-applied Herbicides Supply, Demand and Key Producers, 2026-2032

<https://marketpublishers.com/r/G4D218E57E49EN.html>

Date: September 2026

Pages: 193

Price: US\$ 4,480.00 (Single User License)

ID: G4D218E57E49EN

Abstracts

The global Soil-applied Herbicides market size is expected to reach \$ 19870 million by 2032, rising at a market growth of 3.4% CAGR during the forecast period (2026-2032).

Soil-applied herbicides are chemical weed-control products applied to the soil surface, the cultivated soil layer, or crop rows before or after planting. They are activated by rainfall, irrigation, or mechanical incorporation and move into the weed-seed germination zone, where they are absorbed through roots, coleoptiles, or emerging shoots and suppress cell division, seedling growth, fatty-acid synthesis, photosynthesis, pigment formation, or other physiological processes before or shortly after weed emergence. Major active ingredients include acetochlor, metolachlor and S-metolachlor, pendimethalin, butachlor, pretilachlor, pyroxasulfone, clomazone, atrazine, simazine, metribuzin, trifluralin, fomesafen, sulfentrazone, and related single-active and premix products. Common formulations include emulsifiable concentrates, suspension concentrates, capsule suspensions, suspo-emulsions, oil dispersions, water-dispersible granules, wettable powders, and granules. Key upstream inputs include technical herbicide active ingredients, chloroanilines, chloroacetyl chloride, triazine, isoxazole, pyrazole, pyrimidine, and aromatic intermediates, as well as solvents, emulsifiers, dispersants, wetting agents, safeners, capsule materials, carriers, and packaging materials. Major downstream customers include crop-protection companies and brand owners, pesticide distributors, agricultural retailers, cooperatives, large farms, rice growers, plantations, horticultural producers, turf managers, and professional applicators. On a net formulated-product-weight and manufacturer ex-factory basis, global effective formulation capacity in 2025 is estimated at approximately 2.39 million metric tons, with sales volume of approximately 1.776 million metric tons, average capacity utilization of approximately 74.3%, a weighted average ex-factory price of approximately USD 8.62 per kilogram, and typical gross margins of approximately

24%–38%.

The global soil-applied herbicides market has developed into a competitive structure involving research-based multinational groups, global post-patent suppliers, regional formulation companies, and integrated technical-active and formulation manufacturers in China and India. Leading companies differentiate through proprietary active ingredients, multi-mode-of-action premixes, safeners, capsule formulations, registration data, and crop-system solutions. Mid-sized suppliers compete mainly through cost-efficient production and regional registrations for established products such as acetochlor, butachlor, pendimethalin, atrazine, and metribuzin. Overall supply is adequate and several mature technical active ingredients experience periodic oversupply, while low-use-rate chemistry, complex premixes, and advanced formulations retain stronger differentiation and pricing power.

The spread of herbicide-resistant weeds and declining reliability of certain post-emergence programs are increasing the importance of soil-residual weed control. Growers are moving from dependence on a single post-emergence rescue treatment toward multi-stage programs combining preplant burndown, preemergence residual control, and post-emergence applications. Soil treatment reduces early competition for moisture, nutrients, and sunlight while lowering the risk created by narrow post-emergence application windows and adverse weather. Corn, soybean, rice, cotton, cereals, oilseeds, and sugarcane remain the principal demand centers, while direct-seeded rice, conservation tillage, and control of resistant *Amaranthus* species support additional regional growth.

From a product-development perspective, the industry is moving beyond single chloroacetamide or triazine products toward multi-mode-of-action premixes, low-dose high-efficacy active ingredients, capsule-based controlled release, high-load suspension concentrates, and products offering both preemergence and layered residual flexibility. Pyroxasulfone, flumioxazin, fomesafen, and newer PPO, HPPD, and cellulose-synthesis inhibitors can increase value per treated hectare through lower application rates and longer residual activity. Companies are also improving performance across different soil textures, organic-matter levels, rainfall patterns, and tillage systems, while using safeners and formulation technology to reduce crop injury and rotational-crop restrictions.

Future development will remain constrained by dependence on rainfall and soil moisture, interception by surface crop residue, adsorption by soil organic matter, leaching and runoff risks, crop injury, variable residual duration, and plant-back

restrictions. Atrazine, acetochlor, and several other established products continue to face environmental reassessment and tighter use conditions in different markets, increasing expenditure on registration maintenance, ecotoxicology, and water-protection mitigation. Mechanical weeding, cover crops, precision planting, and robotic systems will displace some chemical demand, but resistance management and the need to reduce post-emergence rescue treatments will continue to support soil-applied programs. Future value growth is therefore expected to come primarily from upgraded premixes, new active ingredients, improved formulations, and locally optimized application programs rather than rapid expansion in the physical use of mature technical products.

Report Scope

This report studies the global Soil-applied Herbicides production, demand, key manufacturers, and key regions.

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

Highlights and key features of the study

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

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

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

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

U.S. VS China: Soil-applied Herbicides domestic production, consumption, key domestic manufacturers and share

Global Soil-applied Herbicides production by manufacturer, production, price,

value and market share 2021-2026, (USD Million) & (Kilotons)

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

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

This report profiles key players in the global Soil-applied 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 Bayer, BASF, Syngenta Group, Corteva, FMC, Albaugh, American Vanguard, Gowan, UPL, Nufarm, 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 Soil-applied 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 Soil-applied Herbicides Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Soil-applied Herbicides Market, Segmentation by Type:

VLCFA Synthesis Inhibitors

Photosystem II Inhibitors

PPO Inhibitors

HPPD Inhibitors

ALS or AHAS Inhibitors

Other

Global Soil-applied Herbicides Market, Segmentation by Application Timing:

Pre-plant Incorporated

Pre-plant Surface-applied

Pre-emergence

Early Post-emergence Residual

Global Soil-applied Herbicides Market, Segmentation by Formulation Type:

Emulsifiable Concentrate

Suspension Concentrate

Capsule Suspension

Suspo-emulsion

Water-dispersible Granules

Other

Global Soil-applied Herbicides Market, Segmentation by Application:

Corn and Soybean

Rice

Cereals and Oilseeds

Cotton and Sugarcane

Horticulture and Plantations

Other

Companies Profiled:

Bayer

BASF

Syngenta Group

Corteva

FMC

Albaugh

American Vanguard

Gowan

UPL

Nufarm

Sipcam Oxon

Sumitomo Chemical

Nissan Chemical

Kumiai Chemical Industry

Ishihara Sangyo Kaisha

LG Chem

Rallis India

Crystal Crop Protection

Sinon Corporation

Nortox

Rainbow Agro

Nantong Jiangshan Agrochemical & Chemicals

Limin Group

Cynda

Fengshan Group

Jiangsu Flag Chemical Industry

Jiangsu Sevencontinent Green Chemical

Key Questions Answered:

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

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