

# Global Soil-applied Herbicides Market 2026 by Manufacturers, Regions, Type and Application, Forecast to 2032

<https://marketpublishers.com/r/GCF224EA56F2EN.html>

Date: September 2026

Pages: 167

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

ID: GCF224EA56F2EN

## Abstracts

According to our (Global Info Research) latest study, the global Soil-applied Herbicides market size was valued at US\$ 15752 million in 2025 and is forecast to a readjusted size of US\$ 19870 million by 2032 with a CAGR of 3.4% during review period.

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 is a detailed and comprehensive analysis for global Soil-applied Herbicides 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 Soil-applied Herbicides market size and forecasts, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Soil-applied Herbicides market size and forecasts by region and country, in consumption value (\$ Million), sales quantity (Kilotons), and average selling prices (US\$/Ton), 2021-2032

Global Soil-applied Herbicides 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 Soil-applied Herbicides 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 Soil-applied Herbicides

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 Soil-applied Herbicides 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 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.

## Market Segmentation

Soil-applied Herbicides 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

VLCFA Synthesis Inhibitors

Photosystem II Inhibitors

PPO Inhibitors

HPPD Inhibitors

ALS or AHAS Inhibitors

Other

## **Market segment by Application Timing**

Pre-plant Incorporated

Pre-plant Surface-applied

Pre-emergence

Early Post-emergence Residual

## **Market segment by Formulation Type**

Emulsifiable Concentrate

Suspension Concentrate

Capsule Suspension

Suspo-emulsion

Water-dispersible Granules

Other

## **Market segment by Application**

Corn and Soybean

Rice

Cereals and Oilseeds

Cotton and Sugarcane

Horticulture and Plantations

Other

Major players covered

Bayer

BASF

Syngenta Group

Corteva

FMC

Albaugh

American Vanguard

Gowan

UPL

Nufarm

Sipcam Oxon

Sumitomo Chemical

Nissan Chemical

Kumiai Chemical Industry

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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

## **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)

## Chapter Outline

Chapter 1, to describe Soil-applied Herbicides product scope, market overview, market estimation caveats and base year.

Chapter 2, to profile the top manufacturers of Soil-applied Herbicides, with price, sales quantity, revenue, and global market share of Soil-applied Herbicides from 2021 to 2026.

Chapter 3, the Soil-applied Herbicides competitive situation, sales quantity, revenue, and global market share of top manufacturers are analyzed emphatically by landscape contrast.

Chapter 4, the Soil-applied Herbicides 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 Soil-applied Herbicides 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 Soil-applied Herbicides.

Chapter 14 and 15, to describe Soil-applied Herbicides sales channel, distributors, customers, research findings and conclusion.

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