

Global Soil-applied Herbicides Market Growth 2026-2032

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Abstracts

The global Soil-applied Herbicides market size is predicted to grow from US\$ 14976 million in 2025 to US\$ 19123 million in 2032; it is expected to grow at a CAGR of 3.6% from 2026 to 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

LP Information, Inc. (LPI) ' newest research report, the "Soil-applied Herbicides Industry Forecast" looks at past sales and reviews total world Soil-applied Herbicides sales in 2025, providing a comprehensive analysis by region and market sector of projected Soil-applied Herbicides sales for 2026 through 2032. With Soil-applied Herbicides sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Soil-applied Herbicides industry.

This Insight Report provides a comprehensive analysis of the global Soil-applied Herbicides landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyzes the strategies of leading global companies with a focus on Soil-applied Herbicides portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Soil-applied Herbicides market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Soil-applied Herbicides and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Soil-applied Herbicides.

This report presents a comprehensive overview, market shares, and growth opportunities of Soil-applied Herbicides market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

VLCFA Synthesis Inhibitors

Photosystem II Inhibitors

PPO Inhibitors

HPPD Inhibitors

ALS or AHAS Inhibitors

Other

Segmentation by Application Timing:

Pre-plant Incorporated

Pre-plant Surface-applied

Pre-emergence

Early Post-emergence Residual

Segmentation by Formulation Type:

Emulsifiable Concentrate

Suspension Concentrate

Capsule Suspension

Suspo-emulsion

Water-dispersible Granules

Other

Segmentation by Application:

Corn and Soybean

Rice

Cereals and Oilseeds

Cotton and Sugarcane

Horticulture and Plantations

Other

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analysing the company's coverage, product portfolio, its market penetration.

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 Addressed in this Report

What is the 10-year outlook for the global Soil-applied Herbicides market?

What factors are driving Soil-applied Herbicides market growth, globally and by region?

Which technologies are poised for the fastest growth by market and region?

How do Soil-applied Herbicides market opportunities vary by end market size?

How does Soil-applied Herbicides break out by Type, by Application?

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