

Global Thiodicarb Carbamate Insecticide Market Growth 2026-2032

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Abstracts

The global Thiodicarb Carbamate Insecticide market size is predicted to grow from US\$ 296 million in 2025 to US\$ 392 million in 2032; it is expected to grow at a CAGR of 4.2% from 2026 to 2032.

Thiodicarb Carbamate Insecticide is an oxime-based carbamate, non-systemic insecticide and ovicide. It belongs to IRAC Group 1A acetylcholinesterase inhibitor. It mainly inhibits acetylcholinesterase in the nervous system of pests through gastric poisoning and contact killing effects, causing continuous nerve excitement, paralysis and death, which is harmful to cotton bolls. It has good activity against eggs and larvae of lepidopteran pests such as tobacco caterpillars, beet armyworms, *Spodoptera frugiperda*, cabbage caterpillars, and diamondback moths. It can also control some coleopteran and other chewing mouthpart pests. Applications include cotton, soybeans, corn, peanuts, beans, vegetables, fruits and other economic crops. The upstream of the industrial chain mainly includes methomyl, methylthioacetaldehyde oxime related intermediates, sulfur dichloride, methanol, toluene or xylene, catalysts, surfactants, dispersants, wetting agents, antifreeze, defoaming agents and packaging materials; the midstream includes the synthesis of raw materials, impurity control, WG/SC/WP and seed coating preparation Production, toxicological and environmental testing, pesticide registration, quality testing, packaging and export compliance; downstream, it enters the cotton, corn, soybean, vegetable and cash crop markets through multinational plant protection companies, regional registration holders, preparation brands, importers, agricultural input distribution networks, seed processing companies and large farms.

Key Findings

Global production volume to reach 14,000 tonnes by 2025.

Cotton, corn, and soybeans constitute the core demand.

Registration status and formulation capabilities determine value differentiation.

Industry Trends

The development focus of the thiodicarb insecticide market is shifting from merely expanding the supply of active ingredients to upgrading formulations, managing resistance, and improving application efficiency. Commercial products are transitioning from traditional wettable powders to high-concentration water-dispersible granules and stable suspension concentrates to enhance ease of handling, dispersion, dosing accuracy, and suitability for mechanized spraying. To address complex populations of Lepidopteran pests, the importance of co-formulations combining thiodicarb with active ingredients possessing different modes of action is rising; this helps broaden the spectrum of control and supports integrated resistance management. While seed treatment remains a specialized application area, foliar spraying continues to be the primary commercial application method for cotton, soybeans, corn, and horticultural crops. In the long term, companies will place greater emphasis on impurity control, low-dust formulations, localized labeling, application timing targeting eggs and early-instar larvae, and product management strategies that integrate thiodicarb into rotation programs.

Market Dynamics

Drivers

Demand for thiodicarb insecticides is primarily driven by the persistent threat posed by cotton bollworms, fall armyworms, and other Lepidopteran pests to cotton, soybean, corn, legume, and vegetable crops. With both ovicidal and larvicidal activity, it enables control before pests cause severe damage to foliage or reproductive organs, while its stomach poison and contact action allow for flexibility in field application strategies. Large-scale agriculture and multi-generational pest outbreaks in Latin America and parts of Asia generate recurring demand for cost-effective Lepidopteran control products. High-concentration formulations reduce transportation and packaging burdens, while co-formulated products—combining rapid knockdown with complementary residual activity—further support market adoption.

Constraints

As a mature active ingredient with a long history of use, thiodicarb faces price competition from generic products and substitution pressure from newer insecticides. Certain products with novel modes of action—offering lower dosage requirements, longer residual efficacy, or more favorable environmental profiles—limit thiodicarb's potential in high-value market segments. Risks associated with operator exposure, agricultural produce residues, and impacts on aquatic and non-target organisms have increased the costs of maintaining registrations and managing the product. Thiodicarb was not included in the list of approved active ingredients in the EU, which significantly limits its commercial application in Europe. Market demand is also influenced by pest infestation levels, crop profitability, and climatic conditions, while profit margins for technical-grade material and standard generic formulations are vulnerable to pressure from oversupply and low-price competition.

Market Opportunities

Key market opportunities for thiodicarb insecticides lie in Latin America and the Asia-Pacific region, where there are extensive cotton, soybean, and corn cultivation areas that face persistent threats from Lepidopteran pests. Low-dust water-dispersible granules (WDG), stable suspension concentrates (SC), crop-specific seed treatment systems, and mixtures utilizing complementary modes of action offer higher value potential than standard generic formulations. Companies can also expand their business through local registration partnerships, label extensions for additional crops, packaging sizes tailored to regional distribution channels, and the provision of application guidance targeting pest eggs and early-instar larvae. Integrating thiodicarb with pest monitoring, biological control, and rotation with insecticides possessing different modes of action helps extend the product's commercial lifecycle within Integrated Pest Management (IPM) systems.

Industry Risks and Challenges

A core, long-standing challenge for the thiodicarb industry is balancing effective pest control with the need to manage resistance selection pressure and meet increasingly stringent environmental and residue management standards. IRAC classifies thiodicarb as a Group 1A insecticide and recommends rotating it with insecticides having different modes of action, rather than using products from the same group consecutively across different pest generations. The product's advantages in ovicidal and larvicidal activity are highly dependent on application timing; failure to apply it during the egg or early-larval stages can reduce actual control efficacy. Companies must also continuously

address issues such as formulation stability, toxicological and environmental data requirements, export residue standards, and disparities in registration systems across different countries. While these barriers favor companies with specialized regulatory teams and established local distribution channels, they increase the difficulty of commercialization for small and medium-sized generic formulation suppliers. ****Industry Chain Analysis****

The upstream segment of the thiodicarb insecticide industry chain primarily comprises methomyl, methylthioacetaldehyde oxime-related intermediates, sulfur dichloride, methanol, aromatic solvents, catalysts, and process aids; formulation production also requires dispersants, wetting agents, binders, antifreeze agents, defoamers, carriers, and packaging materials. Cost competitiveness is influenced by the prices of methomyl and sulfur-containing intermediates, reaction yields, impurity control, energy consumption, wastewater treatment, investments in safety and environmental protection, and plant operating rates. Enterprises possessing a foundation in carbamate chemistry and a stable supply of intermediates generally demonstrate stronger cost and quality control capabilities compared to formulators that rely entirely on purchasing technical-grade active ingredients.

The midstream segment encompasses the synthesis and refining of technical-grade active ingredients, pulverization, granulation, suspension system design, compounding and processing, quality testing, toxicological and environmental studies, product registration, packaging, and export compliance. While prices for technical-grade ingredients and standard generic formulations are highly sensitive to market fluctuations, higher value is derived from formulation stability, registration ownership, local field trial data, and distribution channel coverage. The downstream segment reaches end-users in agriculture through multinational crop protection companies, regional registration holders, importers, agricultural input distributors, seed treatment companies, cooperatives, and large-scale farms; consequently, industry chain profits are gradually shifting from the chemical synthesis stage toward formulation performance, regulatory assets, brand positioning, and agronomic services. Disclosures from Hunan Haili indicate that thiodicarb remains part of its carbamate pesticide production system, underscoring the importance of integrated manufacturing capabilities within this industry chain.

****Market Segment Analysis****

By formulation type, high-concentration water-dispersible granules (WDG) represent a highly standardized product form in the thiodicarb foliar spray market—particularly

common in the field crop markets of Latin America—due to their high active ingredient content, efficient transport, and ability to disperse in water.

By composition, single-active-ingredient thiodicarb products are suitable for scenarios requiring rapid ovicidal and larvicidal action, whereas compounded products—incorporating insect growth regulators or other complementary ingredients—expand the spectrum of biological control and enhance resistance management value. Compounded formulations are better suited for managing complex Lepidopteran pest populations and addressing longer control cycles. Consequently, market value is no longer determined solely by the sales volume of the active ingredient; instead, it is increasingly influenced by formulation quality, combination products, the breadth of registrations, and downstream technical service capabilities.

Downstream Market Opportunities

Cotton, corn, and soybeans constitute the core downstream demand for thiodicarb insecticides; these crops are cultivated on a large scale in key consumption regions and face persistent pressure from pests such as bollworms and noctuid moths. Thiodicarb is particularly well-suited for cropping systems that require the control of eggs and early-instar larvae before significant foliage or reproductive damage occurs. Legumes, peanuts, and vegetables offer additional application opportunities, though demand in these sectors is more fragmented and influenced by local label specifications, residue limits, and crop value. Future competitive downstream solutions will integrate pest monitoring, precise application timing, recommendations for tank-mix compatibility, and the rotation of agents with different modes of action, rather than relying merely on the sale of single, generic products.

Regional Analysis

Estimates from this report indicate that demand is concentrated in large-scale cotton, soybean, and corn cultivation systems, with a diverse commercial product portfolio resulting from a wide range of registrations for WG (water-dispersible granules), SC (suspension concentrates), and combination formulations. The region hosts a mix of multinational brands, local formulators, and suppliers of imported technical-grade active ingredients; thus, securing registration access and establishing distribution networks are critical to regional competitiveness.

Competitive Landscape

The global thiodicarb market features a multi-tiered competitive structure comprising multinational crop protection companies, regional formulators and registration holders, and Asian suppliers of technical-grade active ingredients and export products. Corporate competitiveness hinges on the ability to integrate stable active ingredient quality, WG or SC formulation technologies, regulatory data, registration maintenance, supply reliability, and field services. This market should not be characterized as being dominated by a handful of companies; regional registration holders and contract formulators also constitute significant forces in the supply chain.

Report Scope

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

This Insight Report provides a comprehensive analysis of the global Thiodicarb Carbamate Insecticide 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 Thiodicarb Carbamate Insecticide portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Thiodicarb Carbamate Insecticide market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Thiodicarb Carbamate Insecticide 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 Thiodicarb Carbamate Insecticide.

This report presents a comprehensive overview, market shares, and growth opportunities of Thiodicarb Carbamate Insecticide market by product type, application, key manufacturers and key regions and countries.

Segmentation by Type:

95%–98% Technical Grade

80% Water-Dispersible Granules (WDG)

75% Wettable Powder (WP)

350–375 g/L Suspension Concentrate (SC)

Segmentation by Composition:

Single-Active Ingredient

Mixtures/Co-Formulations

Segmentation by Application Method:

Foliar Spray

Seed Treatment

Seedling Pest Control

Segmentation by Application:

Cotton

Corn

Soybean

Vegetables

Other Cash Crops

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 CropScience

UPL

ADAMA

Hunan Haili Chemical Industry

Tecnomy S.A.

Nortox

Sumitomo Chemical

Sharda Cropchem

Agrinova Cropcare

SML Limited

Zhejiang Rayfull Chemicals

Hebei Veyong Bio-Chemical

Hunan Bide Biochemical Technology

Jiangsu Changlong Agrochemical

Jiangsu Repont Agrochemical

Jin Dun Chemical

Key Questions Addressed in this Report

What is the 10-year outlook for the global Thiodicarb Carbamate Insecticide market?

What factors are driving Thiodicarb Carbamate Insecticide market growth, globally and by region?

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

How do Thiodicarb Carbamate Insecticide market opportunities vary by end market size?

How does Thiodicarb Carbamate Insecticide break out by Type, by Application?

Contents

1 SCOPE OF THE REPORT

- 1.1 Market Introduction
- 1.2 Years Considered
- 1.3 Research Objectives
- 1.4 Market Research Methodology
- 1.5 Research Process and Data Source
- 1.6 Economic Indicators
- 1.7 Currency Considered
- 1.8 Market Estimation Caveats

2 EXECUTIVE SUMMARY

2.1 World Market Overview

- 2.1.1 Global Thiodicarb Carbamate Insecticide Annual Sales 2021-2032
- 2.1.2 World Current & Future Analysis for Thiodicarb Carbamate Insecticide by Geographic Region, 2021, 2025 & 2032
- 2.1.3 World Current & Future Analysis for Thiodicarb Carbamate Insecticide by Country/Region, 2021, 2025 & 2032

2.2 Thiodicarb Carbamate Insecticide Segment by Type

- 2.2.1 95%–98% Technical Grade
 - 2.2.2 80% Water-Dispersible Granules (WDG)
 - 2.2.3 75% Wettable Powder (WP)
 - 2.2.4 350–375 g/L Suspension Concentrate (SC)
 - 2.2.5 Thiodicarb Carbamate Insecticide Sales by Type
 - 2.2.5.1 Global Thiodicarb Carbamate Insecticide Sales Market Share by Type (2021-2026)
 - 2.2.5.2 Global Thiodicarb Carbamate Insecticide Revenue and Market Share by Type (2021-2026)
 - 2.2.5.3 Global Thiodicarb Carbamate Insecticide Sale Price by Type (2021-2026)
- #### 2.3 Thiodicarb Carbamate Insecticide Segment by Composition
- 2.3.1 Single-Active Ingredient
 - 2.3.2 Mixtures/Co-Formulations
 - 2.3.3 Thiodicarb Carbamate Insecticide Sales by Composition
 - 2.3.3.1 Global Thiodicarb Carbamate Insecticide Sales Market Share by Composition (2021-2026)
 - 2.3.3.2 Global Thiodicarb Carbamate Insecticide Revenue and Market Share by

Composition (2021-2026)

2.3.3.3 Global Thiodicarb Carbamate Insecticide Sale Price by Composition (2021-2026)

2.4 Thiodicarb Carbamate Insecticide Segment by Application Method

2.4.1 Foliar Spray

2.4.2 Seed Treatment

2.4.3 Seedling Pest Control

2.4.4 Thiodicarb Carbamate Insecticide Sales by Application Method

2.4.4.1 Global Thiodicarb Carbamate Insecticide Sales Market Share by Application Method (2021-2026)

2.4.4.2 Global Thiodicarb Carbamate Insecticide Revenue and Market Share by Application Method (2021-2026)

2.4.4.3 Global Thiodicarb Carbamate Insecticide Sale Price by Application Method (2021-2026)

2.5 Thiodicarb Carbamate Insecticide Segment by Application

2.5.1 Cotton

2.5.2 Corn

2.5.3 Soybean

2.5.4 Vegetables

2.5.5 Other Cash Crops

2.5.6 Thiodicarb Carbamate Insecticide Sales by Application

2.5.6.1 Global Thiodicarb Carbamate Insecticide Sale Market Share by Application (2021-2026)

2.5.6.2 Global Thiodicarb Carbamate Insecticide Revenue and Market Share by Application (2021-2026)

2.5.6.3 Global Thiodicarb Carbamate Insecticide Sale Price by Application (2021-2026)

3 GLOBAL BY COMPANY

3.1 Global Thiodicarb Carbamate Insecticide Breakdown Data by Company

3.1.1 Global Thiodicarb Carbamate Insecticide Annual Sales by Company (2021-2026)

3.1.2 Global Thiodicarb Carbamate Insecticide Sales Market Share by Company (2021-2026)

3.2 Global Thiodicarb Carbamate Insecticide Annual Revenue by Company (2021-2026)

3.2.1 Global Thiodicarb Carbamate Insecticide Revenue by Company (2021-2026)

3.2.2 Global Thiodicarb Carbamate Insecticide Revenue Market Share by Company (2021-2026)

- 3.3 Global Thiodicarb Carbamate Insecticide Sale Price by Company
- 3.4 Key Manufacturers Thiodicarb Carbamate Insecticide Producing Area Distribution, Sales Area, Product Type
 - 3.4.1 Key Manufacturers Thiodicarb Carbamate Insecticide Product Location Distribution
 - 3.4.2 Players Thiodicarb Carbamate Insecticide Products Offered
- 3.5 Market Concentration Rate Analysis
 - 3.5.1 Competition Landscape Analysis
 - 3.5.2 Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)
- 3.6 New Products and Potential Entrants
- 3.7 Market M&A Activity & Strategy

4 WORLD HISTORIC REVIEW FOR THIODICARB CARBAMATE INSECTICIDE BY GEOGRAPHIC REGION

- 4.1 World Historic Thiodicarb Carbamate Insecticide Market Size by Geographic Region (2021-2026)
 - 4.1.1 Global Thiodicarb Carbamate Insecticide Annual Sales by Geographic Region (2021-2026)
 - 4.1.2 Global Thiodicarb Carbamate Insecticide Annual Revenue by Geographic Region (2021-2026)
- 4.2 World Historic Thiodicarb Carbamate Insecticide Market Size by Country/Region (2021-2026)
 - 4.2.1 Global Thiodicarb Carbamate Insecticide Annual Sales by Country/Region (2021-2026)
 - 4.2.2 Global Thiodicarb Carbamate Insecticide Annual Revenue by Country/Region (2021-2026)
- 4.3 Americas Thiodicarb Carbamate Insecticide Sales Growth
- 4.4 APAC Thiodicarb Carbamate Insecticide Sales Growth
- 4.5 Europe Thiodicarb Carbamate Insecticide Sales Growth
- 4.6 Middle East & Africa Thiodicarb Carbamate Insecticide Sales Growth

5 AMERICAS

- 5.1 Americas Thiodicarb Carbamate Insecticide Sales by Country
 - 5.1.1 Americas Thiodicarb Carbamate Insecticide Sales by Country (2021-2026)
 - 5.1.2 Americas Thiodicarb Carbamate Insecticide Revenue by Country (2021-2026)
- 5.2 Americas Thiodicarb Carbamate Insecticide Sales by Type (2021-2026)
- 5.3 Americas Thiodicarb Carbamate Insecticide Sales by Application (2021-2026)

5.4 United States

5.5 Canada

5.6 Mexico

5.7 Brazil

6 APAC

6.1 APAC Thiodicarb Carbamate Insecticide Sales by Region

6.1.1 APAC Thiodicarb Carbamate Insecticide Sales by Region (2021-2026)

6.1.2 APAC Thiodicarb Carbamate Insecticide Revenue by Region (2021-2026)

6.2 APAC Thiodicarb Carbamate Insecticide Sales by Type (2021-2026)

6.3 APAC Thiodicarb Carbamate Insecticide Sales by Application (2021-2026)

6.4 China

6.5 Japan

6.6 South Korea

6.7 Southeast Asia

6.8 India

6.9 Australia

6.10 China Taiwan

7 EUROPE

7.1 Europe Thiodicarb Carbamate Insecticide by Country

7.1.1 Europe Thiodicarb Carbamate Insecticide Sales by Country (2021-2026)

7.1.2 Europe Thiodicarb Carbamate Insecticide Revenue by Country (2021-2026)

7.2 Europe Thiodicarb Carbamate Insecticide Sales by Type (2021-2026)

7.3 Europe Thiodicarb Carbamate Insecticide Sales by Application (2021-2026)

7.4 Germany

7.5 France

7.6 UK

7.7 Italy

7.8 Russia

8 MIDDLE EAST & AFRICA

8.1 Middle East & Africa Thiodicarb Carbamate Insecticide by Country

8.1.1 Middle East & Africa Thiodicarb Carbamate Insecticide Sales by Country
(2021-2026)

8.1.2 Middle East & Africa Thiodicarb Carbamate Insecticide Revenue by Country

(2021-2026)

8.2 Middle East & Africa Thiodicarb Carbamate Insecticide Sales by Type (2021-2026)

8.3 Middle East & Africa Thiodicarb Carbamate Insecticide Sales by Application
(2021-2026)

8.4 Egypt

8.5 South Africa

8.6 Israel

8.7 Turkey

8.8 GCC Countries

9 MARKET DRIVERS, CHALLENGES AND TRENDS

9.1 Market Drivers & Growth Opportunities

9.2 Market Challenges & Risks

9.3 Industry Trends

10 MANUFACTURING COST STRUCTURE ANALYSIS

10.1 Raw Material and Suppliers

10.2 Manufacturing Cost Structure Analysis of Thiodicarb Carbamate Insecticide

10.3 Manufacturing Process Analysis of Thiodicarb Carbamate Insecticide

10.4 Industry Chain Structure of Thiodicarb Carbamate Insecticide

11 MARKETING, DISTRIBUTORS AND CUSTOMER

11.1 Sales Channel

11.1.1 Direct Channels

11.1.2 Indirect Channels

11.2 Thiodicarb Carbamate Insecticide Distributors

11.3 Thiodicarb Carbamate Insecticide Customer

12 WORLD FORECAST REVIEW FOR THIODICARB CARBAMATE INSECTICIDE BY GEOGRAPHIC REGION

12.1 Global Thiodicarb Carbamate Insecticide Market Size Forecast by Region

12.1.1 Global Thiodicarb Carbamate Insecticide Forecast by Region (2027-2032)

12.1.2 Global Thiodicarb Carbamate Insecticide Annual Revenue Forecast by Region
(2027-2032)

12.2 Americas Forecast by Country (2027-2032)

- 12.3 APAC Forecast by Region (2027-2032)
- 12.4 Europe Forecast by Country (2027-2032)
- 12.5 Middle East & Africa Forecast by Country (2027-2032)
- 12.6 Global Thiodicarb Carbamate Insecticide Forecast by Type (2027-2032)
- 12.7 Global Thiodicarb Carbamate Insecticide Forecast by Application (2027-2032)

13 KEY PLAYERS ANALYSIS

13.1 Bayer CropScience

- 13.1.1 Bayer CropScience Company Information
- 13.1.2 Bayer CropScience Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
- 13.1.3 Bayer CropScience Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.1.4 Bayer CropScience Main Business Overview
- 13.1.5 Bayer CropScience Latest Developments

13.2 UPL

- 13.2.1 UPL Company Information
- 13.2.2 UPL Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
- 13.2.3 UPL Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.2.4 UPL Main Business Overview
- 13.2.5 UPL Latest Developments

13.3 ADAMA

- 13.3.1 ADAMA Company Information
- 13.3.2 ADAMA Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
- 13.3.3 ADAMA Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.3.4 ADAMA Main Business Overview
- 13.3.5 ADAMA Latest Developments

13.4 Hunan Haili Chemical Industry

- 13.4.1 Hunan Haili Chemical Industry Company Information
 - 13.4.2 Hunan Haili Chemical Industry Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.4.3 Hunan Haili Chemical Industry Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.4.4 Hunan Haili Chemical Industry Main Business Overview
 - 13.4.5 Hunan Haili Chemical Industry Latest Developments
- ### **13.5 Tecnomyl S.A.**

- 13.5.1 Tecnomyl S.A. Company Information
- 13.5.2 Tecnomyl S.A. Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
- 13.5.3 Tecnomyl S.A. Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.5.4 Tecnomyl S.A. Main Business Overview
- 13.5.5 Tecnomyl S.A. Latest Developments
- 13.6 Nortox
 - 13.6.1 Nortox Company Information
 - 13.6.2 Nortox Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.6.3 Nortox Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.6.4 Nortox Main Business Overview
 - 13.6.5 Nortox Latest Developments
- 13.7 Sumitomo Chemical
 - 13.7.1 Sumitomo Chemical Company Information
 - 13.7.2 Sumitomo Chemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.7.3 Sumitomo Chemical Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.7.4 Sumitomo Chemical Main Business Overview
 - 13.7.5 Sumitomo Chemical Latest Developments
- 13.8 Sharda Cropchem
 - 13.8.1 Sharda Cropchem Company Information
 - 13.8.2 Sharda Cropchem Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.8.3 Sharda Cropchem Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.8.4 Sharda Cropchem Main Business Overview
 - 13.8.5 Sharda Cropchem Latest Developments
- 13.9 Agrinova Cropcare
 - 13.9.1 Agrinova Cropcare Company Information
 - 13.9.2 Agrinova Cropcare Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.9.3 Agrinova Cropcare Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.9.4 Agrinova Cropcare Main Business Overview
 - 13.9.5 Agrinova Cropcare Latest Developments
- 13.10 SML Limited

- 13.10.1 SML Limited Company Information
- 13.10.2 SML Limited Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
- 13.10.3 SML Limited Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
- 13.10.4 SML Limited Main Business Overview
- 13.10.5 SML Limited Latest Developments
- 13.11 Zhejiang Rayfull Chemicals
 - 13.11.1 Zhejiang Rayfull Chemicals Company Information
 - 13.11.2 Zhejiang Rayfull Chemicals Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.11.3 Zhejiang Rayfull Chemicals Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.11.4 Zhejiang Rayfull Chemicals Main Business Overview
 - 13.11.5 Zhejiang Rayfull Chemicals Latest Developments
- 13.12 Hebei Veyong Bio-Chemical
 - 13.12.1 Hebei Veyong Bio-Chemical Company Information
 - 13.12.2 Hebei Veyong Bio-Chemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.12.3 Hebei Veyong Bio-Chemical Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.12.4 Hebei Veyong Bio-Chemical Main Business Overview
 - 13.12.5 Hebei Veyong Bio-Chemical Latest Developments
- 13.13 Hunan Bide Biochemical Technology
 - 13.13.1 Hunan Bide Biochemical Technology Company Information
 - 13.13.2 Hunan Bide Biochemical Technology Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.13.3 Hunan Bide Biochemical Technology Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.13.4 Hunan Bide Biochemical Technology Main Business Overview
 - 13.13.5 Hunan Bide Biochemical Technology Latest Developments
- 13.14 Jiangsu Changlong Agrochemical
 - 13.14.1 Jiangsu Changlong Agrochemical Company Information
 - 13.14.2 Jiangsu Changlong Agrochemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications
 - 13.14.3 Jiangsu Changlong Agrochemical Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)
 - 13.14.4 Jiangsu Changlong Agrochemical Main Business Overview
 - 13.14.5 Jiangsu Changlong Agrochemical Latest Developments

13.15 Jiangsu Report Agrochemical

13.15.1 Jiangsu Report Agrochemical Company Information

13.15.2 Jiangsu Report Agrochemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

13.15.3 Jiangsu Report Agrochemical Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)

13.15.4 Jiangsu Report Agrochemical Main Business Overview

13.15.5 Jiangsu Report Agrochemical Latest Developments

13.16 Jin Dun Chemical

13.16.1 Jin Dun Chemical Company Information

13.16.2 Jin Dun Chemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

13.16.3 Jin Dun Chemical Thiodicarb Carbamate Insecticide Sales, Revenue, Price and Gross Margin (2021-2026)

13.16.4 Jin Dun Chemical Main Business Overview

13.16.5 Jin Dun Chemical Latest Developments

14 RESEARCH FINDINGS AND CONCLUSION

List Of Tables

LIST OF TABLES

- Table 1. Thiodicarb Carbamate Insecticide Annual Sales CAGR by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Table 2. Thiodicarb Carbamate Insecticide Annual Sales CAGR by Country/Region (2021, 2025 & 2032) & (\$ millions)
- Table 3. Major Players of 95%–98% Technical Grade
- Table 4. Major Players of 80% Water-Dispersible Granules (WDG)
- Table 5. Major Players of 75% Wettable Powder (WP)
- Table 6. Major Players of 350–375 g/L Suspension Concentrate (SC)
- Table 7. Global Thiodicarb Carbamate Insecticide Sales by Type (2021-2026) & (Tons)
- Table 8. Global Thiodicarb Carbamate Insecticide Sales Market Share by Type (2021-2026)
- Table 9. Global Thiodicarb Carbamate Insecticide Revenue by Type (2021-2026) & (\$ million)
- Table 10. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Type (2021-2026)
- Table 11. Global Thiodicarb Carbamate Insecticide Sale Price by Type (2021-2026) & (US\$/kg)
- Table 12. Major Players of Single-Active Ingredient
- Table 13. Major Players of Mixtures/Co-Formulations
- Table 14. Global Thiodicarb Carbamate Insecticide Sales by Composition (2021-2026) & (Tons)
- Table 15. Global Thiodicarb Carbamate Insecticide Sales Market Share by Composition (2021-2026)
- Table 16. Global Thiodicarb Carbamate Insecticide Revenue by Composition (2021-2026) & (\$ million)
- Table 17. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Composition (2021-2026)
- Table 18. Global Thiodicarb Carbamate Insecticide Sale Price by Composition (2021-2026) & (US\$/kg)
- Table 19. Major Players of Foliar Spray
- Table 20. Major Players of Seed Treatment
- Table 21. Major Players of Seedling Pest Control
- Table 22. Global Thiodicarb Carbamate Insecticide Sales by Application Method (2021-2026) & (Tons)
- Table 23. Global Thiodicarb Carbamate Insecticide Sales Market Share by Application

Method (2021-2026)

Table 24. Global Thiodicarb Carbamate Insecticide Revenue by Application Method (2021-2026) & (\$ million)

Table 25. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Application Method (2021-2026)

Table 26. Global Thiodicarb Carbamate Insecticide Sale Price by Application Method (2021-2026) & (US\$/kg)

Table 27. Global Thiodicarb Carbamate Insecticide Sale by Application (2021-2026) & (Tons)

Table 28. Global Thiodicarb Carbamate Insecticide Sale Market Share by Application (2021-2026)

Table 29. Global Thiodicarb Carbamate Insecticide Revenue by Application (2021-2026) & (\$ million)

Table 30. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Application (2021-2026)

Table 31. Global Thiodicarb Carbamate Insecticide Sale Price by Application (2021-2026) & (US\$/kg)

Table 32. Global Thiodicarb Carbamate Insecticide Sales by Company (2021-2026) & (Tons)

Table 33. Global Thiodicarb Carbamate Insecticide Sales Market Share by Company (2021-2026)

Table 34. Global Thiodicarb Carbamate Insecticide Revenue by Company (2021-2026) & (\$ millions)

Table 35. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Company (2021-2026)

Table 36. Global Thiodicarb Carbamate Insecticide Sale Price by Company (2021-2026) & (US\$/kg)

Table 37. Key Manufacturers Thiodicarb Carbamate Insecticide Producing Area Distribution and Sales Area

Table 38. Players Thiodicarb Carbamate Insecticide Products Offered

Table 39. Thiodicarb Carbamate Insecticide Concentration Ratio (CR3, CR5 and CR10) & (2024-2026)

Table 40. New Products and Potential Entrants

Table 41. Market M&A Activity & Strategy

Table 42. Global Thiodicarb Carbamate Insecticide Sales by Geographic Region (2021-2026) & (Tons)

Table 43. Global Thiodicarb Carbamate Insecticide Sales Market Share Geographic Region (2021-2026)

Table 44. Global Thiodicarb Carbamate Insecticide Revenue by Geographic Region

(2021-2026) & (\$ millions)

Table 45. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Geographic Region (2021-2026)

Table 46. Global Thiodicarb Carbamate Insecticide Sales by Country/Region (2021-2026) & (Tons)

Table 47. Global Thiodicarb Carbamate Insecticide Sales Market Share by Country/Region (2021-2026)

Table 48. Global Thiodicarb Carbamate Insecticide Revenue by Country/Region (2021-2026) & (\$ millions)

Table 49. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Country/Region (2021-2026)

Table 50. Americas Thiodicarb Carbamate Insecticide Sales by Country (2021-2026) & (Tons)

Table 51. Americas Thiodicarb Carbamate Insecticide Sales Market Share by Country (2021-2026)

Table 52. Americas Thiodicarb Carbamate Insecticide Revenue by Country (2021-2026) & (\$ millions)

Table 53. Americas Thiodicarb Carbamate Insecticide Sales by Type (2021-2026) & (Tons)

Table 54. Americas Thiodicarb Carbamate Insecticide Sales by Application (2021-2026) & (Tons)

Table 55. APAC Thiodicarb Carbamate Insecticide Sales by Region (2021-2026) & (Tons)

Table 56. APAC Thiodicarb Carbamate Insecticide Sales Market Share by Region (2021-2026)

Table 57. APAC Thiodicarb Carbamate Insecticide Revenue by Region (2021-2026) & (\$ millions)

Table 58. APAC Thiodicarb Carbamate Insecticide Sales by Type (2021-2026) & (Tons)

Table 59. APAC Thiodicarb Carbamate Insecticide Sales by Application (2021-2026) & (Tons)

Table 60. Europe Thiodicarb Carbamate Insecticide Sales by Country (2021-2026) & (Tons)

Table 61. Europe Thiodicarb Carbamate Insecticide Revenue by Country (2021-2026) & (\$ millions)

Table 62. Europe Thiodicarb Carbamate Insecticide Sales by Type (2021-2026) & (Tons)

Table 63. Europe Thiodicarb Carbamate Insecticide Sales by Application (2021-2026) & (Tons)

Table 64. Middle East & Africa Thiodicarb Carbamate Insecticide Sales by Country

(2021-2026) & (Tons)

Table 65. Middle East & Africa Thiodicarb Carbamate Insecticide Revenue Market Share by Country (2021-2026)

Table 66. Middle East & Africa Thiodicarb Carbamate Insecticide Sales by Type (2021-2026) & (Tons)

Table 67. Middle East & Africa Thiodicarb Carbamate Insecticide Sales by Application (2021-2026) & (Tons)

Table 68. Key Market Drivers & Growth Opportunities of Thiodicarb Carbamate Insecticide

Table 69. Key Market Challenges & Risks of Thiodicarb Carbamate Insecticide

Table 70. Key Industry Trends of Thiodicarb Carbamate Insecticide

Table 71. Thiodicarb Carbamate Insecticide Raw Material

Table 72. Key Suppliers of Raw Materials

Table 73. Thiodicarb Carbamate Insecticide Distributors List

Table 74. Thiodicarb Carbamate Insecticide Customer List

Table 75. Global Thiodicarb Carbamate Insecticide Sales Forecast by Region (2027-2032) & (Tons)

Table 76. Global Thiodicarb Carbamate Insecticide Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 77. Americas Thiodicarb Carbamate Insecticide Sales Forecast by Country (2027-2032) & (Tons)

Table 78. Americas Thiodicarb Carbamate Insecticide Annual Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 79. APAC Thiodicarb Carbamate Insecticide Sales Forecast by Region (2027-2032) & (Tons)

Table 80. APAC Thiodicarb Carbamate Insecticide Annual Revenue Forecast by Region (2027-2032) & (\$ millions)

Table 81. Europe Thiodicarb Carbamate Insecticide Sales Forecast by Country (2027-2032) & (Tons)

Table 82. Europe Thiodicarb Carbamate Insecticide Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 83. Middle East & Africa Thiodicarb Carbamate Insecticide Sales Forecast by Country (2027-2032) & (Tons)

Table 84. Middle East & Africa Thiodicarb Carbamate Insecticide Revenue Forecast by Country (2027-2032) & (\$ millions)

Table 85. Global Thiodicarb Carbamate Insecticide Sales Forecast by Type (2027-2032) & (Tons)

Table 86. Global Thiodicarb Carbamate Insecticide Revenue Forecast by Type (2027-2032) & (\$ millions)

Table 87. Global Thiodicarb Carbamate Insecticide Sales Forecast by Application (2027-2032) & (Tons)

Table 88. Global Thiodicarb Carbamate Insecticide Revenue Forecast by Application (2027-2032) & (\$ millions)

Table 89. Bayer CropScience Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 90. Bayer CropScience Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 91. Bayer CropScience Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 92. Bayer CropScience Main Business

Table 93. Bayer CropScience Latest Developments

Table 94. UPL Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 95. UPL Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 96. UPL Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 97. UPL Main Business

Table 98. UPL Latest Developments

Table 99. ADAMA Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 100. ADAMA Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 101. ADAMA Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 102. ADAMA Main Business

Table 103. ADAMA Latest Developments

Table 104. Hunan Haili Chemical Industry Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 105. Hunan Haili Chemical Industry Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 106. Hunan Haili Chemical Industry Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 107. Hunan Haili Chemical Industry Main Business

Table 108. Hunan Haili Chemical Industry Latest Developments

Table 109. Tecnomyl S.A. Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 110. Tecnomyl S.A. Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 111. Tecnomyl S.A. Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 112. Tecnomyl S.A. Main Business

Table 113. Tecnomyl S.A. Latest Developments

Table 114. Nortox Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 115. Nortox Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 116. Nortox Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 117. Nortox Main Business

Table 118. Nortox Latest Developments

Table 119. Sumitomo Chemical Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 120. Sumitomo Chemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 121. Sumitomo Chemical Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 122. Sumitomo Chemical Main Business

Table 123. Sumitomo Chemical Latest Developments

Table 124. Sharda Cropchem Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 125. Sharda Cropchem Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 126. Sharda Cropchem Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 127. Sharda Cropchem Main Business

Table 128. Sharda Cropchem Latest Developments

Table 129. Agrinova Cropcare Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 130. Agrinova Cropcare Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 131. Agrinova Cropcare Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 132. Agrinova Cropcare Main Business

Table 133. Agrinova Cropcare Latest Developments

Table 134. SML Limited Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 135. SML Limited Thiodicarb Carbamate Insecticide Product Portfolios and

Specifications

Table 136. SML Limited Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 137. SML Limited Main Business

Table 138. SML Limited Latest Developments

Table 139. Zhejiang Rayfull Chemicals Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 140. Zhejiang Rayfull Chemicals Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 141. Zhejiang Rayfull Chemicals Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 142. Zhejiang Rayfull Chemicals Main Business

Table 143. Zhejiang Rayfull Chemicals Latest Developments

Table 144. Hebei Veyong Bio-Chemical Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 145. Hebei Veyong Bio-Chemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 146. Hebei Veyong Bio-Chemical Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 147. Hebei Veyong Bio-Chemical Main Business

Table 148. Hebei Veyong Bio-Chemical Latest Developments

Table 149. Hunan Bide Biochemical Technology Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 150. Hunan Bide Biochemical Technology Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 151. Hunan Bide Biochemical Technology Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 152. Hunan Bide Biochemical Technology Main Business

Table 153. Hunan Bide Biochemical Technology Latest Developments

Table 154. Jiangsu Changlong Agrochemical Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 155. Jiangsu Changlong Agrochemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 156. Jiangsu Changlong Agrochemical Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 157. Jiangsu Changlong Agrochemical Main Business

Table 158. Jiangsu Changlong Agrochemical Latest Developments

Table 159. Jiangsu Report Agrochemical Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 160. Jiangsu Report Agrochemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 161. Jiangsu Report Agrochemical Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 162. Jiangsu Report Agrochemical Main Business

Table 163. Jiangsu Report Agrochemical Latest Developments

Table 164. Jin Dun Chemical Basic Information, Thiodicarb Carbamate Insecticide Manufacturing Base, Sales Area and Its Competitors

Table 165. Jin Dun Chemical Thiodicarb Carbamate Insecticide Product Portfolios and Specifications

Table 166. Jin Dun Chemical Thiodicarb Carbamate Insecticide Sales (Tons), Revenue (\$ Million), Price (US\$/kg) and Gross Margin (2021-2026)

Table 167. Jin Dun Chemical Main Business

Table 168. Jin Dun Chemical Latest Developments

List Of Figures

LIST OF FIGURES

- Figure 1. Picture of Thiodicarb Carbamate Insecticide
- Figure 2. Thiodicarb Carbamate Insecticide Report Years Considered
- Figure 3. Research Objectives
- Figure 4. Research Methodology
- Figure 5. Research Process and Data Source
- Figure 6. Global Thiodicarb Carbamate Insecticide Sales Growth Rate 2021-2032 (Tons)
- Figure 7. Global Thiodicarb Carbamate Insecticide Revenue Growth Rate 2021-2032 (\$ millions)
- Figure 8. Thiodicarb Carbamate Insecticide Sales by Geographic Region (2021, 2025 & 2032) & (\$ millions)
- Figure 9. Thiodicarb Carbamate Insecticide Sales Market Share by Country/Region (2025)
- Figure 10. Thiodicarb Carbamate Insecticide Sales Market Share by Country/Region (2021, 2025 & 2032)
- Figure 11. Product Picture of 95%–98% Technical Grade
- Figure 12. Product Picture of 80% Water-Dispersible Granules (WDG)
- Figure 13. Product Picture of 75% Wettable Powder (WP)
- Figure 14. Product Picture of 350–375 g/L Suspension Concentrate (SC)
- Figure 15. Global Thiodicarb Carbamate Insecticide Sales Market Share by Type in 2026
- Figure 16. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Type (2021-2026)
- Figure 17. Product Picture of Single-Active Ingredient
- Figure 18. Product Picture of Mixtures/Co-Formulations
- Figure 19. Global Thiodicarb Carbamate Insecticide Sales Market Share by Composition in 2026
- Figure 20. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Composition (2021-2026)
- Figure 21. Product Picture of Foliar Spray
- Figure 22. Product Picture of Seed Treatment
- Figure 23. Product Picture of Seedling Pest Control
- Figure 24. Global Thiodicarb Carbamate Insecticide Sales Market Share by Application Method in 2026
- Figure 25. Global Thiodicarb Carbamate Insecticide Revenue Market Share by

Application Method (2021-2026)

Figure 26. Thiodicarb Carbamate Insecticide Consumed in Cotton

Figure 27. Global Thiodicarb Carbamate Insecticide Market: Cotton (2021-2026) & (Tons)

Figure 28. Thiodicarb Carbamate Insecticide Consumed in Corn

Figure 29. Global Thiodicarb Carbamate Insecticide Market: Corn (2021-2026) & (Tons)

Figure 30. Thiodicarb Carbamate Insecticide Consumed in Soybean

Figure 31. Global Thiodicarb Carbamate Insecticide Market: Soybean (2021-2026) & (Tons)

Figure 32. Thiodicarb Carbamate Insecticide Consumed in Vegetables

Figure 33. Global Thiodicarb Carbamate Insecticide Market: Vegetables (2021-2026) & (Tons)

Figure 34. Thiodicarb Carbamate Insecticide Consumed in Other Cash Crops

Figure 35. Global Thiodicarb Carbamate Insecticide Market: Other Cash Crops (2021-2026) & (Tons)

Figure 36. Global Thiodicarb Carbamate Insecticide Sale Market Share by Application (2025)

Figure 37. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Application in 2025

Figure 38. Thiodicarb Carbamate Insecticide Sales by Company in 2025 (Tons)

Figure 39. Global Thiodicarb Carbamate Insecticide Sales Market Share by Company in 2025

Figure 40. Thiodicarb Carbamate Insecticide Revenue by Company in 2025 (\$ millions)

Figure 41. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Company in 2025

Figure 42. Global Thiodicarb Carbamate Insecticide Sales Market Share by Geographic Region (2021-2026)

Figure 43. Global Thiodicarb Carbamate Insecticide Revenue Market Share by Geographic Region in 2025

Figure 44. Americas Thiodicarb Carbamate Insecticide Sales 2021-2026 (Tons)

Figure 45. Americas Thiodicarb Carbamate Insecticide Revenue 2021-2026 (\$ millions)

Figure 46. APAC Thiodicarb Carbamate Insecticide Sales 2021-2026 (Tons)

Figure 47. APAC Thiodicarb Carbamate Insecticide Revenue 2021-2026 (\$ millions)

Figure 48. Europe Thiodicarb Carbamate Insecticide Sales 2021-2026 (Tons)

Figure 49. Europe Thiodicarb Carbamate Insecticide Revenue 2021-2026 (\$ millions)

Figure 50. Middle East & Africa Thiodicarb Carbamate Insecticide Sales 2021-2026 (Tons)

Figure 51. Middle East & Africa Thiodicarb Carbamate Insecticide Revenue 2021-2026 (\$ millions)

Figure 52. Americas Thiodicarb Carbamate Insecticide Sales Market Share by Country in 2025

Figure 53. Americas Thiodicarb Carbamate Insecticide Revenue Market Share by Country (2021-2026)

Figure 54. Americas Thiodicarb Carbamate Insecticide Sales Market Share by Type (2021-2026)

Figure 55. Americas Thiodicarb Carbamate Insecticide Sales Market Share by Application (2021-2026)

Figure 56. United States Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 57. Canada Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 58. Mexico Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 59. Brazil Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 60. APAC Thiodicarb Carbamate Insecticide Sales Market Share by Region in 2025

Figure 61. APAC Thiodicarb Carbamate Insecticide Revenue Market Share by Region (2021-2026)

Figure 62. APAC Thiodicarb Carbamate Insecticide Sales Market Share by Type (2021-2026)

Figure 63. APAC Thiodicarb Carbamate Insecticide Sales Market Share by Application (2021-2026)

Figure 64. China Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 65. Japan Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 66. South Korea Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 67. Southeast Asia Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 68. India Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 69. Australia Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 70. China Taiwan Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 71. Europe Thiodicarb Carbamate Insecticide Sales Market Share by Country in

2025

Figure 72. Europe Thiodicarb Carbamate Insecticide Revenue Market Share by Country (2021-2026)

Figure 73. Europe Thiodicarb Carbamate Insecticide Sales Market Share by Type (2021-2026)

Figure 74. Europe Thiodicarb Carbamate Insecticide Sales Market Share by Application (2021-2026)

Figure 75. Germany Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 76. France Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 77. UK Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 78. Italy Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 79. Russia Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 80. Middle East & Africa Thiodicarb Carbamate Insecticide Sales Market Share by Country (2021-2026)

Figure 81. Middle East & Africa Thiodicarb Carbamate Insecticide Sales Market Share by Type (2021-2026)

Figure 82. Middle East & Africa Thiodicarb Carbamate Insecticide Sales Market Share by Application (2021-2026)

Figure 83. Egypt Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 84. South Africa Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 85. Israel Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 86. Turkey Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 87. GCC Countries Thiodicarb Carbamate Insecticide Revenue Growth 2021-2026 (\$ millions)

Figure 88. Manufacturing Cost Structure Analysis of Thiodicarb Carbamate Insecticide in 2026

Figure 89. Manufacturing Process Analysis of Thiodicarb Carbamate Insecticide

Figure 90. Industry Chain Structure of Thiodicarb Carbamate Insecticide

Figure 91. Channels of Distribution

Figure 92. Global Thiodicarb Carbamate Insecticide Sales Market Forecast by Region

(2027-2032)

Figure 93. Global Thiodicarb Carbamate Insecticide Revenue Market Share Forecast by Region (2027-2032)

Figure 94. Global Thiodicarb Carbamate Insecticide Sales Market Share Forecast by Type (2027-2032)

Figure 95. Global Thiodicarb Carbamate Insecticide Revenue Market Share Forecast by Type (2027-2032)

Figure 96. Global Thiodicarb Carbamate Insecticide Sales Market Share Forecast by Application (2027-2032)

Figure 97. Global Thiodicarb Carbamate Insecticide Revenue Market Share Forecast by Application (2027-2032)

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