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# Pesticides: United States

August 2021



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# About This Report

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## Scope

This report forecasts to 2025 US pesticides demand and production in nominal US dollars at the manufacturer level. Total demand is segmented by product in terms of:

- herbicides
- insecticides
- fungicides
- other pesticides such as fumigants, desiccants, and rodenticides

Total demand is also segmented by market as follows:

- agriculture
- commercial
- consumer

To illustrate historical trends, total demand is provided in annual series from 2010 to 2020; production and the various segments are reported at five-year intervals for 2010, 2015, and 2020.

Unless otherwise specified, data are for formulated pesticide products (i.e., the first level of formulation after the production of technical-grade pesticide active ingredients).

Among items excluded from coverage in this report are:

- bulk commodities such as copper, sulfur, and petroleum oils
- wood preservatives
- disinfectants and antimicrobials – which are often regulated as pesticides

Key macroeconomic indicators are also provided with quantified trends. Other various topics, including profiles of pertinent leading companies, are covered in this report. A full outline of report items by page is available in the Table of Contents.

## Sources

*Pesticides: United States* (FF35048) is based on *Global Pesticides*, a comprehensive industry study published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies

- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

## Industry Codes

**Table 7 | NAICS & SIC Codes Related to Pesticides**

NAICS/SCIAN 2017		SIC	
North American Industry Classification System		Standard Industrial Classification	
325320	Pesticide and other agricultural chemical manufacturing	2879	Pesticides and agricultural chemicals, NEC

Source: US Census Bureau

## Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market’s current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or  $r^2$ . The most stable data series relative to the trend carries an  $r^2$  value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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## Resources

### The Freedonia Group

*Global Pesticides*

### Freedonia Industry Studies

*Home & Garden Pesticides*

*Global Agricultural Equipment*

*Lawn & Garden Consumables*

*Power Lawn & Garden Equipment*

### Freedonia Focus Reports

*Beer: United States*

*Bread & Bakery Products: United States*

*Cannabis Production: United States*

*Distilled Spirits: United States*

*Dough, Dry Pasta, & Tortillas, United States*

*Fertilizers: United States*

*Field Crop Seeds: United States*

*Food Processing: United States*

*Landscaping Services: United States*

*Manufacturing: United States*

*Phosphate Rock: United States*

*Soybean Products: United States*

### Freedonia Custom Research

### Packaged Facts

*Home Food Gardening: U.S. Market Trends & Opportunities*

### Trade Publications

*Ag-News*

*AgWeb*

*C&EN*

*Chemical Week*

*Chemistry World*

*CropLife*

*ICIS*

## Agencies & Associations

Association of American Pesticide Control Officials  
Beyond Pesticides  
CropLife International  
Food and Agriculture Organization of the United Nations  
National Pest Management Association  
Pesticide Action Network  
Soil Association  
United States Census Bureau  
United States Department of Energy  
United States Environmental Protection Agency  
United States International Trade Commission