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# Agricultural Pesticides: United States

January 2022



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# About This Report

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## Scope

This report forecasts to 2025 US agricultural pesticides demand 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, defoliants, and rodenticides

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

Also included in the scope of this report are repellants, which instead of killing pests, are designed to repel or discourage their presence. 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
- commercial (including floriculture) and consumer (including home edible gardening)

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).

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

*Agricultural Pesticides: United States (FF35080)* is based on [Global Agricultural 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 nongovernmental 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 4 | NAICS & SIC Codes Related to Agricultural Pesticides**

NAICS/SCIAN 2017 North American Industry Classification System		SIC 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 Agricultural Pesticides*

### Freedonia Industry Studies

*Global Agricultural Equipment*

*Global Fertilizers*

*Global Power Lawn & Garden Equipment*

*Home & Garden Pesticides*

*Lawn & Garden Consumables*

*Lawn & Garden Consumer Insights: The Home Gardener*

*Lawn & Garden Fertilizers*

*Lawn & Garden Mulch*

*Lawn & Garden Seeds*

*Lawn Mowers*

*Power Lawn & Garden Equipment*

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*Agricultural Equipment: United States*

*Fertilizers: United States*

*Field Crop Seeds: United States*

*Peat: United States*

*Perlite & Vermiculite: United States*

*Pesticides: Canada*

*Pesticides: Europe*

*Pesticides: United States*

*Phosphate Rock: United States*

### Freedonia Custom Research

### 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 Nations Comtrade  
United States Census Bureau  
United States Department of Energy  
United States Environmental Protection Agency  
United States International Trade Commission