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Home & Garden Pesticides

US Industry Study with Forecasts for **2011 & 2016**

Study #2245 | October 2007 | \$4500 | 175 pages

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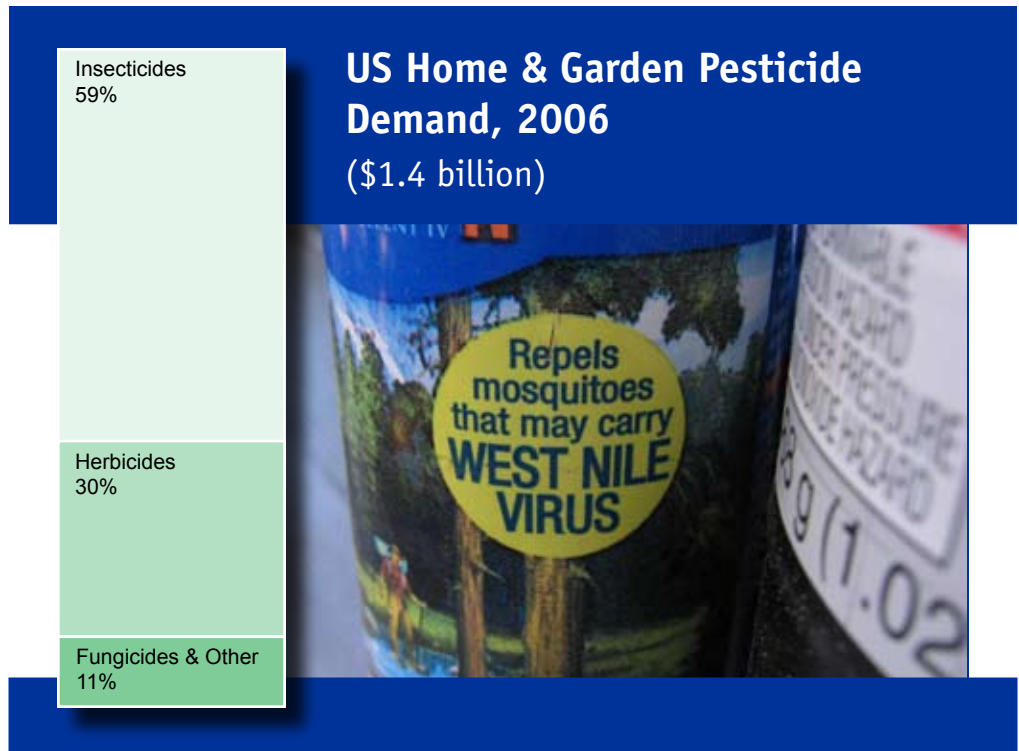
New product introductions -- featuring more convenient packaging, safety features, or different formulations -- such as ready-to-use and superconcentrated versions -- will boost demand.

US demand to grow 4.8% annually through 2011

US demand for home and garden pesticides (sometimes referred to as consumer pesticides) is projected to increase 4.8 percent per year to \$1.7 billion in 2011. Gains will rebound from a difficult period, which was characterized by slow volume growth and price declines in the first years of the decade. Although most leading active ingredients have maintained their market presence for years, new product introductions -- featuring more convenient packaging, safety features, or different formulations, such as ready-to-use and superconcentrated versions -- will boost demand. The home and garden pesticides segment, which does not include professional (commercial) pesticide treatments in residential settings, accounts for about 20 percent of the overall formulated pesticide market. Home and garden applications are dominated by household insecticides and lawn and garden herbicides, which together account for nearly two-thirds of total sales. Other key outlets include lawn and garden insecticides and insect repellents.

Dominant household uses to outpace lawn/garden types

Household applications, which account for a majority of overall demand, are projected to register faster growth than lawn and garden applications. Among the reasons for this faster growth is the resurgent insect repellent segment.



Once thought more or less mature, due in part to concerns about product safety, the insect repellent segment has been re-energized by heightened awareness of West Nile virus and other insectborne pathogens. In the lawn and garden segments, growth for conventional pesticides will trail that of biopesticides, due to the growing use of *Bacillus thuringiensis* (Bt) and other biopesticides in lawn and garden applications and the emergence of animal repellents.

Insecticides, fungicides to be fastest growing

Insecticides are by far the largest product category in the home and garden pesticide market, accounting for

almost 60 percent of overall demand in 2006. This is due in part to the aforementioned large household category, but also because insecticides are the only category of pesticides widely used in both household and lawn and garden applications. Herbicides, the leading product category in lawn and garden applications, is expected to register somewhat slower growth due to a relative lack of new product introductions and continued reliance on established products. The smaller fungicides and other products category are expected to register faster than average growth due to the increasing market presence of specialized repellents and the greater use of more sophisticated fungicide products to address lawn diseases.

Sample Text, Table & Chart

RAW MATERIALS

Herbicides

Demand for herbicide active ingredients in home and garden pesticides is projected to increase to 1.3 billion pounds by 2011. Growth in sales of herbicides will be commensurate with the overall growth of the pesticide market, limited to some extent by the proliferation of turfcare services and consumer demand for organic pesticides. However, prospects for the success of ROUNDUP (Monsanto), BAYER ADVANCED, ORTHO (Scotts Miracle-Gro) and other pesticides. Among the leading active ingredients are 2,4-D, MCPP and dicamba. Other herbicides used in lawn and garden applications include benefin, MSMA, triclopyr and trifluralin.

2,4-D is one of the oldest synthetic pesticides still in wide use in the consumer market. It is often combined with other actives in formulations that allow for broader spectrum effectiveness at lower overall active ingredient loadings. For example, BAYER ADVANCED ALL-IN-ONE LAWN WEED & CRABGRASS KILLER combines 2,4-D with quinclorac and dicamba. ORTHO WEED-B-GON MAX WEED KILLER FOR LAWNS uses a combination of dicamba and MCPP with 2,4-D. The three active ingredients account for less than one half of one percent of the ready-to-use formulation.

The active ingredient which has increased its market share and profile among consumers in recent decades is glyphosate, the active ingredient in Monsanto's ROUNDUP product line. Instrumental in this increase was the agreement with Scotts Miracle-Gro that capitalized on Scotts' extensive experience in the consumer lawn and garden market, of which it is the market leader in many segments. Consumer versions of ROUNDUP usually couple glyphosate with other ingredients. For example, ROUNDUP WEED & GRASS KILLER CONCENTRATE PLUS

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**SAMPLE
TEXT**

TABLE III-4

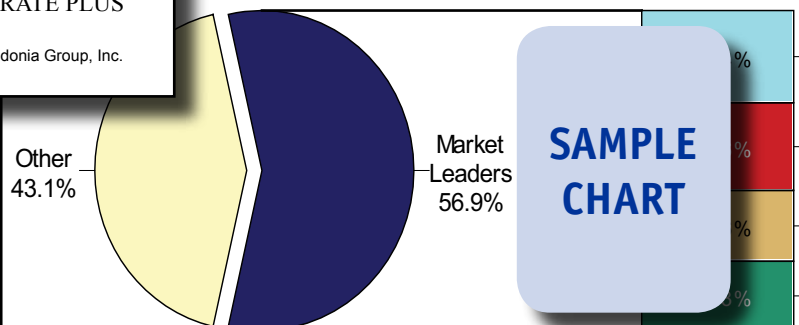
HOME & GARDEN INSECTICIDE DEMAND BY APPLICATION (million dollars)

Item	1996	2001	2006	2011	2016
Households (mil)	100	100	100	100	100
\$ insecticide/household					
Home & Garden Insecticide Demand Household:					
Insect Control					
Insect Repellents					
Lawn & Garden:					
Lawn Care					
Garden					
Other					
\$/lb					
Home & Garden Insecticides (mil lb)	100	100	100	100	100

**SAMPLE
TABLE**

CHART VI-1

HOME & GARDEN PESTICIDE MARKET SHARE, 2006 (\$1.3 billion)

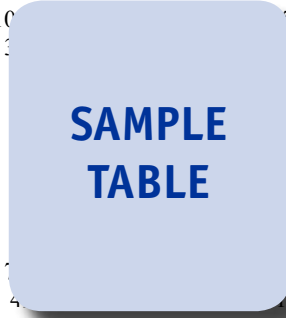


**SAMPLE
CHART**

Sample Profile, Table & Forecast

TABLE IV-3
HOUSEHOLD INSECTICIDE DEMAND
(million dollars)

Item	1996	2001	2006	2011	2016
Households (mil)	100	100	100	100	100
\$ pesticide/household	2.5	2.5	2.5	2.5	2.5
Household Insecticide Demand	250	250	250	250	250
Flying Insects	100	100	100	100	100
Crawling Insects	100	100	100	100	100
Fleas & Ticks	100	100	100	100	100
Other	100	100	100	100	100
% insects	2.5	2.5	2.5	2.5	2.5
Household Pesticide Demand	250	250	250	250	250

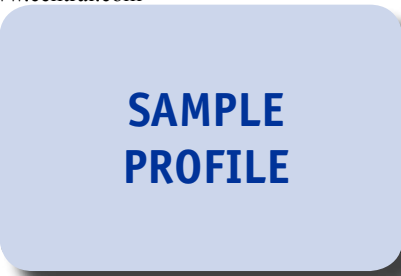


COMPANY PROFILES

Central Garden & Pet Company

1340 Treat Boulevard, Suite 600
 Walnut Creek, CA 94597
 925-948-4000
<http://www.central.com>

Sales: \$
 Employe
 Key Pro



Central Garden & Pet Company offers a wide range of products for the home and garden. The company is organized into two segments: Garden Products and Pet Products.

The Company participates in the home and garden pesticides industry through the Garden Products segment, which had sales of \$802 million in FY 2006. Through this segment, Central Garden & Pet produces and markets an array of premium and value-oriented branded consumer lawn and garden products, including pesticides, grass seed, bird feed and other birding accessories, and decorative outdoor products. The Company's home and garden pesticides are produced and supplied through several wholly and partially owned subsidiaries and businesses, including Ambrands, Grant Laboratories Incorporated, Lilly Miller Brands, Pennington Seed Incorporated and Tech Pac LLC.

Ambrands & Grant Laboratories -- The Ambrands business (Atlanta, Georgia) makes AMDRO fire ant bait products and IMAGE specialty herbicides. According to Central Garden & Pet, Ambrands' AMDRO products represent the leading brand of fire ant baits, sold primarily in the Southern US. AMDRO products encompass fire ant baits and yard treatment chemicals that kill the queen and other ants to

"Demand for household insect repellents, including those applied to persons and pets, is projected to increase 6.3 percent annually to \$210 million in 2011. Gains will be boosted by the emergence of new repellent products, as well as a renewed level consumer acceptance for the use of chemical repellents on the skin to deter mosquitoes and other biting insects, attributable in large part to highly publicized insectborne illnesses like West Nile virus."

--Section IV, pg. 72

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OTHER STUDIES

Wood Protection Coatings & Preservatives

US demand for wood protection coatings and preservatives will grow 3.4% annually through 2011, driven in part by a shift toward higher value formulations. Interior applications such as flooring and cabinets will lead gains. Exterior uses will continue to suffer from wood's gradual market losses to lower-maintenance alternatives. This study analyzes the \$2.9 billion US wood protection industry, with forecasts for 2011 and 2016 by product, application and market. It also details market share and profiles major firms.

#2243 10/2007..... \$4500

World Enzymes

World demand for enzymes will grow 7.6% annually through 2011. Gains will be driven by continued robust growth in pharmaceutical enzyme demand, double-digit increases in demand for biocatalysts for drug and fine chemical production, and the rapid expansion in bioethanol production from grains. This study analyzes the \$4.1 billion world enzyme industry, with forecasts for 2011 and 2016 by product, market, world region and for 15 countries. It also evaluates market share and profiles major players.

#2229 09/2007..... \$5400

World Wipes

US wipes demand will grow 6.1% annually through 2011. Developed markets in the US, Western Europe and Japan will remain dominant, while more rapid gains will occur in developing nations such as China and India. Baby wipes will stay the largest type while household, personal care and health care wipes grow the fastest. This study analyzes the \$5.8 billion world wipes industry, with forecasts for 2011 and 2016 by product, world region and for 14 countries. It also details market share and profiles major producers.

#2231 08/2007..... \$5400

Biocides

US demand for biocides will grow 4.3% annually through 2010. Gains will be driven by sustained production levels in key outlets and by heightened awareness of the dangers of bacterial growth and foodborne pathogens. Higher value specialty products will continue to replace chlorine and other commodities in water treatment. This study analyzes the \$2.1 billion US biocide industry to 2010 and 2015 by product, function and market. It also evaluates company market share and profiles leading competitors.

#2082 07/2006..... \$4300

Lawn & Garden Consumables

US demand for packaged lawn and garden consumables will grow 4.9% annually through 2010. Best opportunities are expected for new products that offer convenience and good performance while meeting health and safety standards. Growth will be led by fertilizers, growing media and mulch. This study analyzes the \$7.2 billion US lawn and garden consumable industry to 2010 and 2015 by product, market, application, end user and region. It also evaluates market share and profiles major players.

#2075 07/2006..... \$4300

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