

[CLICK TO VIEW](#)

[Table of Contents 2](#)

[List of Tables & Charts 3](#)

[Study Overview 4](#)

[Sample Text, Table
& Chart 5](#)

[Sample Profile, Table &
Forecast 6](#)

[Order Form 7](#)

[About Freedonia, Custom
Research, Related Studies,
Corporate Use License 8](#)



Home & Garden Pesticides

US Industry Study with Forecasts for **2013 & 2018**

Study #2589 | January 2010 | \$4700 | 188 pages



The Freedonia Group

767 Beta Drive

Cleveland, OH • 44143-2326 • USA

Toll Free US Tel: 800.927.5900 or +1 440.684.9600

Fax: +1 440.646.0484

E-mail: info@freedoniagroup.com

www.freedoniagroup.com

Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

General	4
Macroeconomic Outlook	5
Demographic Trends	10
Population	11
Households	13
Consumer Income & Spending Patterns	14
Housing Outlook	15
Home Gardening Activity Outlook ..	19
Pesticide Market Overview	22
Formulated Pesticide Product Demand	23
Active Ingredients	26
Organic Gardening Outlook	27
Household Pest Control Market Overview	29
Services	31
Competitive Products	33
Regulatory & Environmental Issues	35
Pricing & Product Mix	39
Historical Market Trends	42
International Activity & Foreign Trade	44

PRODUCTS

General	48
Conventional Pesticides vs. Biopesticides	50
Formulations	52
Insecticides	54
Herbicides	59
Fungicides & Other	63

APPLICATIONS

General	68
Household	69
Insect Control	72
Insect Repellents	74
Other	76
Lawn & Garden	78
Lawn Care	81
Garden	85
Other	87

RAW MATERIALS

General	90
Active Ingredients	91
Herbicides	94
Insecticides	96
Fungicides & Other	99
Inert Ingredients	100
Minerals	103
Surfactants	104
Solvents	105
Other	106

INDUSTRY STRUCTURE

General	107
Market Share	110
Competitive Strategies	116
Brand Name Recognition	116
Private Label Products	117
Packaging	118
Product Line Expansion	119
Product Focus	120
Cooperative Agreements	121
Marketing	122
Conventional Advertising	123
Strategic Media Partnerships ...	124
Internet	124
Manufacturing	126

Distribution Channels	126
Home Centers	128
Mass Merchandisers	129
Garden Centers	130
Internet	131
Other	131

COMPANY PROFILES

Ace Hardware	134
Acuity Brands	135
Andersons Incorporated	136
BASF SE	138
Bayer AG	139
Bonide Products	142
Central Garden & Pet	145
Chase Products	148
Dow Chemical	149
FMC Corporation	150
Gardens Alive!	151
Green Light	153
Henkel AG	155
Homax Products	156
Home Depot	158
Johnson (SC) & Son	159
Lebanon Seaboard	161
Liquid Fence	162
Lowe's Companies	164
McLaughlin Gormley King	165
Monsanto Company	166
Not Tonight Deer!	167
Organic Laboratories	168
Reckitt Benckiser	169
Scotts Miracle-Gro	170
Sears Holdings	174
Spectrum Brands	175
Syngenta AG	180
Wal-Mart Stores	182
Willert Home Products	183
Woodstream Corporation	184
Zep Incorporated	186

List of Tables

EXECUTIVE SUMMARY

- 1 Summary Table3

MARKET ENVIRONMENT

- 1 Macroeconomic Indicators9
- 2 Population & Households 11
- 3 Personal Consumption Expenditures & Disposable Income 15
- 4 Households, Housing Stock & Housing Completions 19
- 5 Consumer Lawn & Garden Activity Expenditures22
- 6 Pesticide Market Overview 25
- 7 Organic Gardening Pesticide Demand29
- 8 Household Pest Control Products & Services 31
- 9 Selected Active Ingredient & Formulated Product Prices....42
- 10 Home & Garden Pesticide Market, 1998-200844

PRODUCTS

- 1 Home & Garden Pesticide Demand by Type49
- 2 Home & Garden Pesticides: Conventional vs. Biopesticides 52
- 3 Home & Garden Pesticide Demand by Formulation 54
- 4 Home & Garden Insecticide Demand by Application 58
- 5 Home & Garden Herbicide Demand by Application 62
- 6 Home & Garden Fungicide & Other Pesticide Demand by Application 66

APPLICATIONS

- 1 Home & Garden Pesticide Demand by Application 69
- 2 Household Applications for Home & Garden Pesticides....71
- 3 Household Insect Control Demand 74
- 4 Household Insect Repellent Demand 76
- 5 Other Household Pesticide Applications 78
- 6 Lawn & Garden Pesticide Applications 80
- 7 Lawn Care Pesticide Demand...84
- 8 Garden Pesticide Demand 86
- 9 Other Lawn & Garden Pesticide Demand 89

RAW MATERIALS

- 1 Home & Garden Pesticide Raw Material Demand by Type 91
- 2 Home & Garden Pesticide Active Ingredient Demand by Type 93
- 3 Home & Garden Herbicide Active Ingredient Demand ...96
- 4 Home & Garden Insecticide Active Ingredient Demand ...98
- 5 Home & Garden Fungicide & Other Active Ingredient Demand 100
- 6 Home & Garden Pesticide Inert Ingredient Demand by Type 103

INDUSTRY STRUCTURE

- 1 US Home & Garden Pesticide Sales by Company, 2008 109
- 2 Selected Cooperative Agreements 122

List of Charts

MARKET ENVIRONMENT

- 1 US Pesticide Imports by Source, 2008 47
- 2 US Pesticide Exports by Destination, 2008 47

PRODUCTS

- 1 Home & Garden Pesticide Demand by Type, 2008 50
- 2 Home & Garden Insecticide Demand by Application, 2008 59
- 3 Home & Garden Herbicide Demand by Application, 2008 63
- 4 Home & Garden Fungicide & Other Pesticide Demand by Application, 2008 67

APPLICATIONS

- 1 Household Applications for Home & Garden Pesticides, 2008 ... 71
- 2 Lawn & Garden Pesticide Demand by Application, 2008 81
- 3 Lawn Care Pesticide Demand by Type, 2008 85
- 4 Garden Pesticide Demand by Type, 2008 87
- 5 Other Lawn & Garden Pesticide Applications by Type, 2008 .. 89

RAW MATERIALS

- 1 Home & Garden Pesticides Active Ingredient Demand by Type, 2008 94

INDUSTRY STRUCTURE

- 1 US Home & Garden Pesticide Market Share, 2008 111

Concerns about insect-borne diseases and imported aggressive insects, along with general concerns about lawn and garden appearance and property upkeep, will help drive gains.

US demand to increase 4.1% yearly through 2013

US demand for home and garden pesticides is projected to increase 4.1 percent annually to \$1.7 billion in 2013. Gains will be limited to some extent by the relative maturity of the US market. However, continued modest growth in population and household formation will boost demand for products such as indoor insecticides and insect repellents -- especially in light of concerns about insect-borne health threats such as West Nile virus and the growing problem with aggressive insects such as red imported fire ants. In lawn and garden applications, growth will be prompted by the continued popularity of home gardening, and general concerns about lawn appearance and property upkeep.

Innovations based on packaging, specialization

The US home and garden pesticide market is the largest in the world. Due to their general level of affluence, US consumers tend to favor products that are highly effective, convenient, and safe for people, pets and other non-target organisms -- factors advantageous to value-added products in handy packaging formats designed to reduce exposure to risk and minimize time and effort spent on pesticide application. Much of the recent innovation in home and garden pesticide products has come in



areas such as packaging (e.g., pump and wand contained within the bottle) and broadened product lines (e.g., weed-specific herbicide formulations) that include pre-diluted ready-to-use and superconcentrated products, in addition to the traditional concentrates which remain a significant part of the lawn and garden segment.

Pesticide active ingredients remain largely unchanged

While there have been numerous innovations in formulated home and garden pesticides, the essential components of these products -- active ingredients -- have not undergone a similar

transformation in recent years. The leading herbicide actives in consumer products, glyphosate and 2,4-D, have been on the market for quite some time. Although a number of leading insecticide actives, including diazinon and chlorpyrifos, were removed from the consumer market several years ago, synthetic pyrethroids and other products already on the market quickly filled their place. DEET (N,N-diethyl-meta-toluamide) has been the leading insect repellent for decades, despite consumer safety concerns. A number of changes to household rodenticides have made them safer to use, but their active ingredients remain mostly the same.

Copyright 2010 The Freedonia Group, Inc.

[Click here to purchase online](#)

Sample Text, Table & Chart

APPLICATIONS

Insect Control

Demand for household insect control products is projected to increase by \$5 million in 2013. Growth is driven by stronger formulations that offer effective control with minimal risk to people. For the past several years, consumers have favored products in safe and effective formulations that offer more accurate control without imparting unpleasant odors.

SAMPLE TEXT

In volume terms, there is expected to be relatively little change for household insecticides. Value gains will be driven by a number of factors. The replacement of older insecticide types, most notably organophosphates and carbamates, will boost value growth by incorporating safer, higher value insecticide active ingredients in consumer formulations for use both indoors and outdoors. Pyrethroids are the chemical class most likely to benefit by this ongoing shift. Moreover, while traditional products such as conventional pet flea and tick products and household foggers are declining, value added products, including improved flea and tick products which pose less threats to pets without compromising effectiveness, are increasing market share.

Increasingly, synthetic pyrethroids are becoming the dominant active ingredient category in household insect control. Allethrin, bifenthrin, permethrin and tetramethrin are among the actives used in leading insecticides marketed by Black Flag Brands (Homax Products), B&B Products, Green Light, Spectrum Brands, Woodstream and others. FMC, MGK and Syngenta are among the suppliers of active ingredients to finished product formulators.

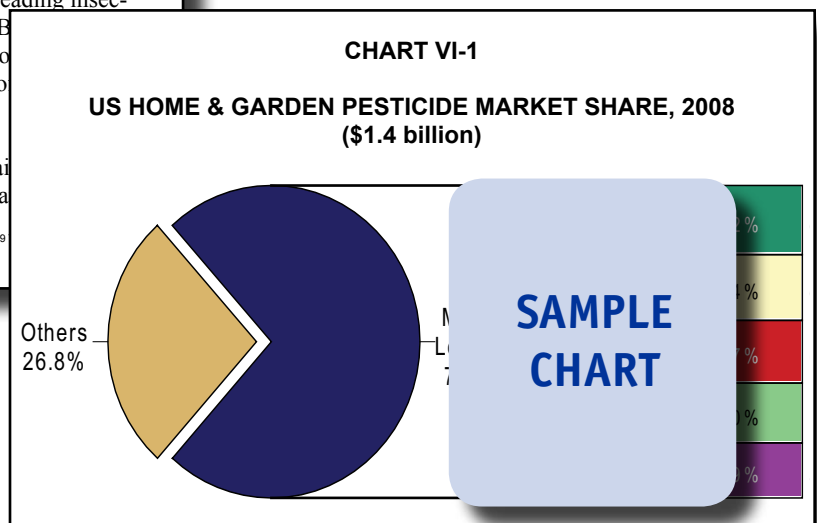
Although conventional pesticides are expected to remain dominant in the household insect control segment, a number of alternative

72

Copyright 2009

TABLE V-1 HOME & GARDEN PESTICIDE RAW MATERIAL DEMAND BY TYPE (million pounds)					
Item	1998	2003	2008	2013	2018
H & G Pesticide Production water content					
H & G Pesticide Raw Material Demand					
Active Ingredients					
Inert Ingredients					
\$/lb					
H & G Pesticide Raw Materials (mil \$)					
Active Ingredients					
Inert Ingredients					

SAMPLE TABLE



Sample Profile, Table & Forecast

TABLE III-4
HOME & GARDEN INSECTICIDE DEMAND BY APPLICATION
 (million dollars)

Item	1998	2003	2008	2013	2018
Households (mil)	100	100	100	100	100
\$ insecticide/household					
Home & Garden Insecticide Demand					
Household:					
Insect Control					
Insect Repellents					
Lawn & Garden:					
Lawn & Turf					
Garden					
Other					
% insecticides					
Home & Garden Pesticide Demand	887	1150	1500	1800	2000



COMPANY PROFILES

Gardens Alive! Incorporated
 5100 Schenley Place
 Lawrenceburg, IN 47025
 812-537-8650
<http://www.gardensalive.com>

Annual Sales: [redacted]
 Employment: [redacted]

Key Products: [redacted] es, fungicides and herbicides

Gardens Alive! is an environmentally responsible lawn care company that sells a variety of natural, organic lawn care products for lawn foods and other consumables through its mail-order catalog business.

The Company participates in the US home and garden pesticide industry through the production of insecticides, fungicides and herbicides made from environmentally friendly ingredients. Among the insecticides produced by Gardens Alive! are OIL AWAY SUPREME insecticidal spray made from cottonseed oil; PYOLA insect spray for controlling a wide range of insects, including ants, aphids, leafhoppers, beetles and caterpillars; KNOCK-OUT GNAT Bacillus thuringiensis-based granules for controlling gnat populations in houseplants and home greenhouses; LAWN-GARD bioinsecticide for preventative and early treatment of a wide range of grubs in turfgrass applications; and BULLS-EYE bioinsecticide for controlling foliage-feeding worms, leafminers and a wide range of other pests in home gardens, lawns and ornamentals. Additional insect control products include ESCAR-GO! slug and snail control, STA-HOME beneficial lady bugs, GRUB-AWAY

151 Copyright 2009 The Freedonia Group, Inc.



“Demand for home and garden insecticides is forecast to increase 4.0 percent per year to \$1 billion in 2013. Demand for consumer insecticides will be stimulated by the development of safer formulations that are easy to use and do not stain or have unpleasant odors. In outdoor uses, growth will be promoted by the increasing use of products, including biopesticides, previously available only to commercial and agricultural users. Growth will also be fueled by ...”
 --Section III, pg. 54-5

OTHER STUDIES

World Fertilizers

This study analyzes the world fertilizer industry. It presents historical demand data for the years 1999, 2004 and 2009, and forecasts for 2014 and 2019 by fertilizer type (e.g., nitrogen, phosphate, potassium), end use market (agriculture, consumer, commercial), world regional market and for over 30 major national markets. The study also considers market environment factors, details industry structure, evaluates company market share and profiles industry participants.

#2726 March 2011..... \$5900

World Lawn & Garden Consumables

Global lawn and garden consumable demand will grow 4.3% annually through 2014. Gains will be influenced by the dominant US market, while developing regions grow the fastest from a smaller base. Seeds, fertilizers and growing media will provide fast growth. This study analyzes the \$12.7 billion world lawn and garden consumable industry, with forecasts for 2014 and 2019 by product, market, world region and for 17 countries. It also evaluates company market share and profiles industry participants.

#2678 October 2010 \$5800

Lawn, Garden & Agricultural Packaging

US lawn, garden and agricultural packaging demand will reach \$1.7 billion in 2013. Consumer preferences for convenient, user-friendly packaging will benefit reclosable pouches, dispensing closures and other value-added types. Agriculture will remain the largest market while the consumer market grows the fastest. This study analyzes the US lawn, garden and agricultural packaging industry, with forecasts for 2013 and 2018 by market, application and product. It also evaluates market share and profiles industry players.

#2555 September 2009..... \$4600

World Power Lawn & Garden Equipment

Global demand for power lawn and garden equipment will expand 2.8% annually through 2013. The bedrock US market will provide the best opportunities based in part on improved products such as cordless electric models. North America and Western Europe will remain the dominant markets. This study analyzes the \$16.1 billion world power lawn and garden equipment industry, with forecasts for 2013 and 2018 by product, world region and for 22 countries. It also evaluates market share and profiles industry players.

#2542 August 2009..... \$5800

Disinfectant & Antimicrobial Chemicals

US demand for disinfectant and antimicrobial chemicals is projected to grow 3.6% annually through 2013. The consumer market will grow the fastest, driven by fears of foodborne and other pathogens, while paint and coatings remains the largest market. Organosulfurs will be the fastest-growing product category. This study analyzes the \$1 billion US disinfectant and antimicrobial chemical industry, with forecasts for 2013 and 2018 by market, function and product. It also evaluates market share and profiles industry players.

#2474 March 2009..... \$4600

About The Freedonia Group

The Freedonia Group, Inc., is a leading international industry market research company that provides its clients with information and analysis needed to make informed strategic decisions for their businesses. Studies help clients identify business opportunities, develop strategies, make investment decisions and evaluate opportunities and threats. Freedonia research is designed to deliver unbiased views and reliable outlooks to assist clients in making the right decisions. Freedonia capitalizes on the resources of its proprietary in-house research team of experienced economists, professional analysts, industry researchers and editorial groups. Freedonia covers a diverse group of industries throughout the United States, the emerging China market, and other world markets. Industries analyzed by Freedonia include:

- Chemicals • Plastics • Life Sciences • Packaging • Building Materials • Security & Electronics • Industrial Components & Equipment • Automotive & Transportation Equipment • Household Goods • Energy/Power Equipment

[Click here to learn more about Freedonia](#)

Freedonia Custom Research

Freedonia Custom Research delivers the same high quality, thorough and unbiased assessment of an industry or market as an industry study. Since the research initiative is based upon a company's specific needs, companies harness Freedonia's research capabilities and resources to answer unique questions. When you leverage the results of a Freedonia Custom Research engagement, you are able to obtain important answers to specific questions and issues associated with: mergers and acquisitions, new product launches/development, geographic expansion, entry into new markets, strategic business planning, and investment and funding decisions.

Freedonia Custom Research is ideal for companies seeking to make a strategic difference in the status quo and focus on future business growth. Working side by side with clients, Freedonia's team is able to define a research project that is custom-tailored to answer specific questions and provide the basis from which a company can make informed business decisions.

[Click here to learn more about Custom Research](#)



[Click here for complete title list](#)

[Click here to visit freedoniagroup.com](http://www.freedoniagroup.com)