World Pesticides

Industry Study with Forecasts for 2014 & 2019

Study #2664 | August 2010 | $5800 | 516 pages
Other Central & South America ........................................... 113
Argentina ............................................................................. 118
General .................................................................................. 24
Pesticide Demand ............................................................. 124
Austria .................................................................................... 127
Belgium ................................................................................... 131
Finland ................................................................................. 135
France ..................................................................................... 139
Germany ............................................................................... 144
Greece ..................................................................................... 149
Ireland .................................................................................... 153
Italy ........................................................................................ 157
Netherlands .......................................................................... 162
Portugal ................................................................................. 165
Spain ......................................................................................... 169
United Kingdom ................................................................... 174
Other Western Europe ....................................................... 179

EASTERN EUROPE
General .................................................................................. 184
Pesticide Demand ............................................................. 186
Poland ..................................................................................... 189
Romania ............................................................................... 193
Russia ...................................................................................... 197
Ukraine ................................................................................... 203
Other Eastern Europe ......................................................... 208

ASIA/PACIFIC
General .................................................................................. 213
Pesticide Demand ............................................................. 215
Australia ............................................................................... 218
China ....................................................................................... 223
India ........................................................................................ 230
Indonesia ............................................................................... 236
Japan ......................................................................................... 240
Malaysia ............................................................................... 246
Philippines ............................................................................ 250
South Korea ........................................................................... 254
Thailand ................................................................................... 259
Other Asia/Pacific ............................................................... 263

AFRICA/MIDEAST
General .................................................................................. 270
Pesticide Demand ............................................................. 272
Egypt ......................................................................................... 275
Iran ........................................................................................ 279
Nigeria ...................................................................................... 283
Saudi Arabia ......................................................................... 287
South Africa ........................................................................... 292
Turkey ....................................................................................... 296
Other Africa/Mideast ........................................................... 300

INDUSTRY STRUCTURE
General .................................................................................. 306
Market Share ......................................................................... 309
Industry Restructuring ...................................................... 314
Manufacturing Strategies .................................................. 318
Marketing .............................................................................. 319
Distribution ........................................................................... 321
Research & Development .................................................. 322
Competitive Strategies ...................................................... 324
Cooperative Agreements ..................................................... 326

COMPANY PROFILES
Agrium Incorporated ............................................................. 333
Agro-Kansho Company ...................................................... 336
Albaugh Incorporated .......................................................... 338
American Vanguard ............................................................ 339
Arysta LifeScience ............................................................... 343
Auriga Industries ................................................................. 347
BASF SE ................................................................................ 353
Bayer AG .............................................................................. 363
Becker Underwood ............................................................. 374
Cargill Incorporated ............................................................ 376
Central Garden & Pet ......................................................... 378
Chemtura Corporation ........................................................ 382
Dow Chemical ..................................................................... 386
Drexel Chemical ................................................................. 392
DuPont (EI) de Nemours ..................................................... 394
Fine Holdings ..................................................................... 401
PMC Corporation ................................................................ 402
Gowan Company ............................................................... 406
Homax Products ................................................................ 409
Isagro SPa ........................................................................... 411
Ishihara Sangyo Kaisha ....................................................... 413
Johnson (SC) & Son ............................................................ 416
Land O’ Lakes ...................................................................... 418
Lebanon Seaboard ................................................................ 420
Makhteshim-Agan Industries ............................................. 423
Marubeni Corporation ......................................................... 428
McLaughlin Gormley King ................................................. 430
Mitsui & Company ............................................................. 432
Monsanto Company ............................................................ 435
Nihon Nohyaku ................................................................ 440
Nippon Soda ...................................................................... 443
Nufarm Limited ................................................................... 445
PBI/Gordon Corporation .................................................... 452
Reckitt Benckiser ................................................................ 455
Scotts Miracle-Gro ............................................................... 457
SePRO Corporation ............................................................. 463
SIFCAM-DXON Group ........................................................ 465
Spectrum Brands ................................................................ 468
Sumitomo Chemical ............................................................ 471
Syngenta AG ....................................................................... 478
United Phosphorus ............................................................ 488
Zep Incorporated ................................................................. 495
Other Companies Mentioned in Study ................................ 497

List of Tables/Charts
EXECUTIVE SUMMARY ............................................................. 3
MARKET ENVIRONMENT .......................................................... 11
INDUSTRY STRUCTURE .......................................................... 306
COMPANY PROFILES ............................................................ 333
LIST OF TABLES/CHARTS .......................................................... 3
Pesticide Demand .................................................................. 66
General .................................................................................. 66
Pesticide Demand ............................................................. 66
United States ....................................................................... 69
Canada .................................................................................. 77
Mexico .................................................................................... 82
CENTRAL & SOUTH AMERICA .................................................. 88
General .................................................................................. 88
Pesticide Demand ............................................................. 90
Argentina ............................................................................... 93
Brazil ...................................................................................... 98
Chile ......................................................................................... 104
Colombia ............................................................................... 108
Peru ....................................................................................... 112
Other Central & South America ......................................... 116
ORDER NOW, CLICK HERE ......................................................... 2

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List of Tables/Charts

(continued from previous page)

4 World Personal Consumption
   Expenditures by Region ............................. 16
5 World Agricultural Output by Region ................. 18
6 World Agricultural Land Use by Region & Crop ....... 20

Ch: World Agricultural Land Use by Region, 2009 .... 21
7 Ch: World Agricultural Land Use by Crop, 2009 .... 21
8 Ch: Leading Wheat Producing Countries, 2008 ...... 22
9 Ch: Leading Corn Producing Countries, 2008 ....... 23
10 Ch: Leading Rice Producing Countries, 2008 ...... 25
11 Ch: Leading Soybean Producing Countries, 2008 ... 26

OVERVIEW

1 World Pesticide Demand by Region .................... 35
2 World Pesticide Demand by Region, 2009 ............. 36
3 World Herbicide Demand by Region ................... 38
4 World Herbicide Demand by Region, 2009 .......... 42
5 World Insecticide Demand by Region ................. 44
6 World Insecticide Demand by Region, 2009 .......... 45
7 World Fungicide Demand by Region ................... 46
8 World Fungicide Demand by Region, 2009 .......... 47
9 World Demand for Other Pesticides by Region....... 49
10 World Demand for Other Pesticides by Region, 2009.50
11 World Pesticide Demand by Market ................... 53
12 World Pesticide Demand by Market, 2009 ........... 53
13 World Pesticide Demand by Market, 2009 .......... 53
14 World Agricultural Pesticide Demand by Region .. 55
15 World Agricultural Pesticide Demand by Region, 2009.56
16 World Consumer Pesticide Demand by Region ...... 59
17 World Consumer Pesticide Demand by Region, 2009.60
18 World Commercial Pesticide Demand by Region .... 61
19 World Commercial Pesticide Demand by Region, 2009.62

NORTH AMERICA

1 North America: Market Environment .................. 66
2 North America: Pesticide Demand by Type & Market .68
3 Ch: North America: Pesticide Demand by Country, 2009.69
4 United States: Market Environment .................. 72
5 United States: Pesticide Demand by Type & Market ... 76
6 Canada: Market Environment ........................... 79
7 Canada: Pesticide Demand by Type & Market ........ 82
8 Mexico: Market Environment ........................... 85
9 Mexico: Pesticide Demand by Type & Market ........ 87

CENTRAL & SOUTH AMERICA

1 Central & South America: Market Environment, 2009.90
2 Central & South America: Pesticide Demand by Type & Market 92
3 Ch: Central & South America: Pesticide Demand by Country, 2009 .93
4 Argentina: Market Environment ........................... 95
5 Argentina: Pesticide Demand by Type & Market ....... 98
6 Brazil: Market Environment .............................. 101

6 Brazil: Pesticide Demand by Type & Market .......... 104
7 Chile: Market Environment .............................. 106
8 Chile: Pesticide Demand by Type & Market .......... 108
9 Colombia: Market Environment ......................... 110
10 Colombia: Pesticide Demand by Type & Market .... 112
11 Peru: Market Environment .............................. 114
12 Peru: Pesticide Demand by Type & Market .......... 116
13 Other Central & South America: Market Environment .118
14 Other Central & South America: Pesticide Demand by Type & Market ... 121

WESTERN EUROPE

1 Western Europe: Market Environment ................ 124
2 Western Europe: Pesticide Demand by Type & Market .126
3 Ch: Western Europe: Pesticide Demand by Country, 2009.127
4 Austria: Market Environment ............................ 129
5 Austria: Pesticide Demand by Type & Market ........ 131
6 Belgium: Market Environment ........................... 133
7 Belgium: Pesticide Demand by Type & Market ....... 135
8 Finland: Market Environment ........................... 137
9 Finland: Pesticide Demand by Type & Market ........ 139
10 France: Market Environment ............................ 141
11 France: Pesticide Demand by Type & Market ....... 144
12 Germany: Market Environment .......................... 146
13 Germany: Pesticide Demand by Type & Market .... 149
14 Greece: Market Environment ........................... 151
15 Greece: Pesticide Demand by Type & Market ...... 153
16 Ireland: Market Environment ........................... 155
17 Ireland: Pesticide Demand by Type & Market ....... 157
18 Italy: Market Environment ............................... 159
19 Italy: Pesticide Demand by Type & Market .......... 161
20 Netherlands: Market Environment ........................ 163

AFRICA/MIDEAST

1 Africa/Mideast: Market Environment .................. 272
2 Africa/Mideast: Pesticide Demand by Type & Market ... 274
3 Ch: Africa/Mideast: Pesticide Demand by Country, 2009.275
4 Egypt: Market Environment ............................. 277
5 Egypt: Pesticide Demand by Type & Market .......... 278
6 Iran: Market Environment ............................... 281
7 Iran: Pesticide Demand by Type & Market .......... 283
8 Nigeria: Market Environment ............................ 285
9 Nigeria: Pesticide Demand by Type & Market ....... 287
10 Saudi Arabia: Market Environment .................... 290
11 Saudi Arabia: Pesticide Demand by Type & Market ... 292
12 South Africa: Market Environment .................... 294
13 South Africa: Pesticide Demand by Type & Market ... 296
14 Turkey: Market Environment ............................ 298
15 Turkey: Pesticide Demand by Type & Market ....... 300
16 Africa/Mideast: Pesticide Demand by Type & Market ... 305

INDUSTRY STRUCTURE

1 World Pesticide Sales by Company, 2009 ............. 308
2 Ch: World Pesticide Market Share, 2009 .......... 311
3 Selected Acquisitions & Divestitures ................. 315
4 Selected Cooperative Agreements ..................... 328
Global demand to rise 2.9% yearly through 2014

World demand for pesticides is projected to increase 2.9 percent per year to $52 billion in 2014. These gains will reflect a reversal of the substantial declines registered in 2009, caused in part by a precipitous price drop for glyphosate, the leading herbicide product. Only a year earlier, high glyphosate prices helped to boost overall market value. These high prices lured in new producers, especially in China, which created overcapacity that contributed to the 2009 price decline.

Central and South America is projected to offer the best growth opportunities through 2014. Brazil has become one of the world’s great agricultural powers, and other countries in the region have similarly boosted their agricultural output by increasing their use of better performing pesticide active ingredients, often at the expense of commodities and hazardous conventional pesticides whose market presence has deteriorated. The Africa/Mideast region is also expected to post above average growth, but will remain the smallest regional market, as much of the agricultural activity in the region is undertaken without sophisticated pesticide formulations.

Agriculture to remain dominant market

Agriculture continues to dominate the pesticide market to the point where overall pesticide market growth tends to mirror that of the agricultural market. The smaller commercial and consumer pesticide markets are expected to register faster growth than more established agricultural uses, although combined they will account for only about 20 percent of the global market. Rising income levels and standards of living will create greater demand for household pest control products and commercial rodent and insect control. However, the areas in which this growth will be most dramatic will be those in which agricultural uses account for larger than average shares of overall demand. Moreover, few of these countries are expected to achieve a level of affluence normally associated with large numbers of golf courses and other commercial outlets for pesticides.

Fungicides to be fastest growing product type

Herbicides and insecticides will remain the largest product types. One or the other of these products is largest in essentially every national market, due to their extensive use on the major field crops. However, fungicides and other pesticide products are expected to register faster growth through the forecast period. Fungicide value gains will derive from a continuing move away from sulfur and other commodities in favor of formulated synthetic fungicides. Moreover, while herbicide and insecticide volumes have been affected by the use of biotechnology-derived products, fungicide usage has not.
Brazil: Pesticide Demand

Demand for pesticides in Brazil is projected to increase at a CAGR of 5.1% per year to $6.3 billion in 2014. Gains will be boosted by continued volume growth, which has been prompted by greater use of specialty pesticides overall and by growth in the amount of cropland. Export commodities will drive demand for both herbicides and fungicides. The industrialization of the nation’s farms will continue to increase the use of pesticides overall.

Brazil’s major crops, soybeans and corn, are both herbicide-intensive. As a result, herbicides constitute the largest product category in Brazil, accounting for about half of overall demand. Insecticides remain a key product as well, although many efforts to curb the use of objectionable pesticides have focused on some insecticide active ingredients, particularly organochlorines. Fungicides are expected to register above average growth, due to expanding soybean production and the need to combat Asian soybean rust.

Until recently, Brazil’s pesticide product mix was fairly heavy with products that had been banned or severely restricted in many parts of the world. Several of the so-called “dirty dozen” -- twelve persistent organic pollutants -- remained cleared for use in Brazil, although all were restricted to some degree. However, in 2004 Brazil ratified the Stockholm Convention on Persistent Organic Pollutants (POPs), leading to the removal of heptachlor and other POPs. Efforts to ban or further reduce the use of these products should boost demand for safer pesticides that do not pose as much threat to users or the environment. Among the other pesticides that have been removed from the Brazilian market are benomyl, butachlor, maneb, monocrotophos, parathion and zineb.

Because Brazil is the largest national market in the region and one of the largest crop protection markets in the world, many of the 102

Sample Table

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<th>Item</th>
<th>1999</th>
<th>2004</th>
<th>2009</th>
<th>2014</th>
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<td>Gross Domestic Product (bil 2008$)</td>
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<td>1661</td>
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<td>% agriculture</td>
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<td>Pesticide/capita</td>
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<td>Pesticide Demand (mil $)</td>
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<td>4935</td>
<td>6325</td>
<td>7950</td>
</tr>
</tbody>
</table>

Sample Chart

World Pesticide Market Share

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“Each of the big six is active in the Brazilian market, and multinational producers overall dominate sales. BASF has a plant in Guaratingueta. Bayer operates a facility in Belford Roxo. Dow Chemical has several facilities in Brazil, at Jardinopolis, Cravinhos, Franco de Rocha and Jacarei. DuPont has a production site in Barra Mansa. Monsanto operates plants in Camacari and Sao Jose dos Campos. Other firms with plants in Brazil include ...”

--Section V, pg. 103
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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 worldwide 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 10/2010 5800

Enzymes
US demand for enzymes will rise 4.8% annually to 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, research and biotechnology, and biocatalyst markets. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the $2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors. #2670 09/2010 4900

World Industrial Gases
Global demand for industrial gases will increase 8% yearly to 2014. The Asia/Pacific region will remain the fastest growing based on its ever expanding manufacturing base. The Africa/Mideast region will also exceed average growth rates, driven by its large oil reserves and refining industry. This study analyzes the $35.7 billion world industrial gas industry, with forecasts for 2014 and 2019 by market, type, world region and for 27 countries. It also evaluates company market share and profiles industry participants. #2659 08/2010 5900

Lawn & Garden Consumables
US demand for packaged lawn and garden consumables will grow 2.4% yearly through 2014. Seeds and growing media will be the fastest growing products. The large residential segment will benefit from solid participation in home lawn care and food gardening. This study analyzes the $12.7 billion US lawn and garden consumable industry, with forecasts for 2014 and 2019 by type, formulation, market, application, end use and US region. It also evaluates company market share and profiles industry players. #2635 05/2010 4900

World Salt
Global salt demand will rise 2.6% yearly through 2013. Growth in developing countries will more than offset an expected contraction of salt demand in developed economies. The large chemical manufacturing market will generate most new demand, due to rapid growth in Chinese chemical production. This study analyzes the $9.7 billion world salt industry, with forecasts for 2013 and 2018 by salt market, production method, world region and for 20 countries. It also evaluates company market share and profiles industry participants. #2597 03/2010 5700

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