World Pesticides

Industry Study with Forecasts for **2014 & 2019**

Study #2664 | August 2010 | $5800 | 516 pages

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Industry Study with Forecasts for ***2014 & 2019***

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Central and South American will offer the best growth opportunities, as countries in the region have boosted their agricultural output by increasing their use of better performing pesticides.

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

World Pesticide Demand, 2009
($45 billion)

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.

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Sample Text, Table & Chart

CENTRAL & SOUTH AMERICA

Brazil: Pesticide Demand

Demand for pesticides in Brazil is projected to increase
per year to $ [illegible] will be boosted by co
volume grov [illegible] ed by greater use of s
pesticides o [illegible] mount of cropland.
export comn [illegible] ill drive demand for
and fungicid [illegible] zation of the nation's
continue to i [illegible] sticides overall.

SAMPLE TEXT

Brazil's major crops, soybeans and corn, are both herbic
sive. As a result, herbicides constitute the largest product cat
Brazil, accounting for about half of overall demand. Insectic
a key product as well, although many efforts to curb the use
objectionable pesticides have focused on some insecticide ac
ent classes, particularly organochlorines. Fungicides are exp
register above average growth, due to expanding soybean pro
the need to combat Asian soybean rust.

Until recently, Brazil's pesticide product mix was fairly
products that had been banned or severely restricted in many
of the world. Several of the so-called "dirty dozen" -- twelve
organic pollutants -- remained cleared for use in Brazil, altho
all were restricted to some degree. However, in 2004 Brazil
Stockholm Convention on Persistent Organic Pollutants (PO[illegible]
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 [illegible]
benomyl, butachlor, maneb, monocrotophos, parathion and z[illegible]

Because Brazil is the largest national market in the regi[illegible]
of the largest crop protection markets in the world, many of [illegible]

TABLE V-5

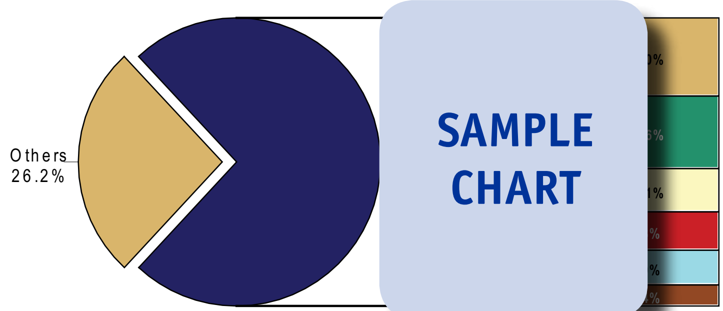
BRAZIL: MARKET ENVIRONMENT

Item	1999	2004	2009	2014	2019
Population (mil persons)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1.6
GDP per capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Gross Domestic Product (bil 2008$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
% agriculture	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6
Agricultural Output (bil 2008$)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Area Harvested (mil hectares)	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1
Soybeans	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]9
Corn	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1
Sugar Cane	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]9
Dry Beans	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1
Rice	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1
Other:	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]0
Wheat	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]5
Coffee	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]5
Cassava	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]1
Cotton	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]3
All Other	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6
$ pesticide/capita	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]6
$ pesticide/000$ GDP	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]7
$ pesticide/hectare	[illegible]	[illegible]	[illegible]	[illegible]	[illegible]2
Pesticide Demand (mil $)	2490	3410	4935	6325	7950

SAMPLE TABLE

CHART X-1

WORLD PESTICIDE MARKET SHARE
($45 billion, 2009)



SAMPLE CHART

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Sample Profile, Table & Forecast

TABLE V-6

BRAZIL: PESTICIDE DEMAND BY TYPE & MARKET (million dollars)

Item	1999	2004	2009	2014	2019
Agricultural Output (bil 2008$)					7.0
$ pesticide/000$ ag output					.4
Pesticide Demand					50
By Type:					
Herbicide					70
Insecticide					00
Fungicide					15
Other					65
By Market:					
Agriculture					00
Commercial					35
Consumer					15
% Brazil					.4
C & S America Pesticide Demand	[illegible]	[illegible]	[illegible]	[illegible]	90

SAMPLE TABLE

COMPANY PROFILES

Becker Underwood Incorporated
801 Dayton Avenue
Ames, IA 50010
515-232-5907
http://www.beckerunderwood.com

Annual Sales:
Employment:

Key Products ... icides

SAMPLE PROFILE

Becker U... specialty bio-agronomic an... management, seed treatmen... management, forestry, profess... The Company is owned by Norwest Equity Partners (Minneapolis, Minnesota), a private equity firm. Becker Underwood has operations in more than 50 countries worldwide.

Products -- The Company is involved in the world pesticide industry primarily through the production of beneficial nematodes, which are used to control populations of insect pests in agricultural, turf and ornamental, greenhouse and nursery, and other applications. Beneficial nematodes attack target insect pests by entering natural body openings and releasing deadly bacteria. Becker Underwood's beneficial nematodes, which are marketed under the BIONEM, BIOVECTOR, MILLENIUM, NEMASYS and NEMATA brand names, are available in varieties that target specific insect pests. Among the insects targeted by beneficial nematodes are black vine weevils, caterpillars, chinch bugs, codling moths, cranberry girdlers, European crane flies, fungus gnats, peachtree borers, shore flies and western flower thrips. These pest control products are suitable for use with a wide range of fruit, nut,

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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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Other Studies

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 .... 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 in part 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 $8 billion US lawn and garden consumables 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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