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# World Agricultural Pesticides

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Industry Study with Forecasts for **2016 & 2021**

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Study #2902 | August 2012 | \$6200 | 458 pages

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*Good prospects exist in Brazil, the US, China, and Argentina, with sales of pesticides in Brazil and Argentina aided by industrial feedstock crops and more sophisticated farming techniques.*

## Brazil to surpass US and become largest world market by 2016

The world agricultural pesticide industry has been transformed by several years of robust growth coupled with new environmental regulations and changing crop mix trends. Increased farming of biofuel crops and the use of genetically modified (GM) seeds caused pesticide sales in Argentina and Brazil to more than double between 2006 and 2011, with Brazil surpassing the US to become the largest market in the world. China became the fourth largest national market as rising pesticide production in the country improved domestic pesticide availability and facilitated sharply increasing utilization rates.

Going forward, growth in global formulated pesticide demand will return to more sustainable levels following strong gains from 2006 to 2011, with sales forecast to approach \$59 billion in 2016. Significant opportunities will exist in Brazil, the US, China, and Argentina. Sales of pesticides in Brazil and Argentina will be aided by increasing demand for industrial feedstock crops and the use of more sophisticated farming techniques. The US will remain the second largest market, benefiting from its vast amount of cropland and pesticide use rates that are higher than the world average. China's growth will slow to a more sustainable level, but remain above average as growers make the change from older generic products to newer proprietary formulations.

## World Pesticide Demand, 2016 (\$58.9 billion)



Central & South America  
27%

Asia/Pacific  
25%

Western Europe  
19%

North America  
17%

Other Regions  
12%

## Fastest growth to occur in developing countries

The fastest growth in pesticide demand is expected in developing countries in Eastern Europe, South America, and Asia. Growing production of rapeseed and cereal crops, along with improved farming techniques, will drive demand in Eastern Europe. Ukraine and Russia will offer strong growth potential due to their low utilization rates compared to other European countries. In contrast, demand growth in Western Europe, Japan, and South Korea will be weak, hindered by market maturity and already high use rates. A shift in product mix and the use of integrated pest management (IPM) techniques will restrain growth in Western Europe.

## Most pesticides to continue evolving, raising prices

Herbicide resistance continues to be an issue and is driving demand for new formulations with multiple active ingredients, which will command higher prices going forward. While insecticide demand will benefit from the adoption of higher-priced, safer products, growth will be restrained by environmental concerns, the use of IPM techniques, and the popularity of insect-resistant crop varieties. Fungicide demand will be affected by two trends in product mixes: the switch to synthetic fungicides over commodities in developing regions; and the need for more sophisticated, effective products in developed nations.

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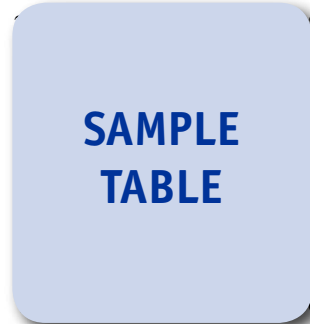
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## Sample Profile, Table & Forecast

**TABLE IX-6**  
**TURKEY: AGRICULTURAL PESTICIDE DEMAND BY TYPE**  
 (million dollars)

Item	2001	2006	2011	2016	2021
Area Harvested (mil hectares)					
\$ pesticide/hectare					
Pesticide Demand					
Herbicide					
Insecticide					
Fungicide					
Other					
% Turkey					
Africa/Mideast Pesticide Demand					



### COMPANY PROFILES

**Albaugh Incorporated**  
 1525 Northeast 36th Street  
 Ankeny, IA 50021  
 515-964-9444  
<http://www.alt>

Annual Sales:  
 Employment:

Key Products: ides, and plant  
 growth regulat



Albaugh is a privately held formulator and producer of off-patent crop protection products. The Company's products comprise various herbicides, fungicides, insecticides, and plant growth regulators.

The Company is active in the world agricultural pesticide industry through the production of herbicides, fungicides, insecticides, and plant growth regulators. Albaugh's herbicides include glyphosate, oxyfluorfen, imazethapyr, clopyralid, picloram, quinclorac, dicamba, phenoxy, clethodim, trifluralin, propazine, 2-methyl-4-chlorophenoxyacetic acid, 2,4-dichlorophenoxyacetic acid, bromoxynil, triclopyr, and fomesafen formulations. Specifically, the Company manufactures GLYSTAR glyphosate types used to kill weeds, grasses, and other unwanted plants in preplant burndown, pre-emergent, post-emergence, noncrop, post-harvest grain sorghum, and preharvest applications. Oxyfluorfen herbicides comprise OXYSTAR types that are safe for use on cotton and soybean crops, while imazethapyr herbicides are sold under the THUNDER MASTER brand name for pre-emergence use in protecting soybean crops, or post-emergence on ROUNDUP READY soybeans produced by Monsanto Company (US). Albaugh makes clopyralid herbicides in COMMANDO and COMMANDO-M formulations that

"Agricultural output accounted for over nine percent of Turkey's total economic activity in 2011. Going forward, agricultural output is expected to grow 2.6 percent per year through 2016. Turkey's climate provides a very favorable growing environment for wheat, which is the largest crop by land use. Other important crops include barley, olives, corn, grapes, cultivated pasture, and hazelnuts."

--Section IX, pg. 269

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**OTHER STUDIES**

**Home & Garden Pesticides**

US demand for home and garden pesticides is projected to increase 3.2 percent per year to \$2.3 billion in 2016. Insecticides and fungicides will be the fastest growing types. Household applications will outpace lawn and garden uses, promoted by increased awareness of pest-borne diseases and by continued problems with aggressive insects. This study analyzes the \$2 billion US home and garden pesticide industry, with forecasts for 2016 and 2021 by product, application and raw material. The study also evaluates company market share and profiles industry players.

#2947 ..... October 2012 ..... \$4900

**Fertilizers in China**

Demand for fertilizers in China is forecast to increase 3.3 percent per annum through 2015 to 262 million metric tons. Sales will be supported by growth in the amount of sown areas and rising rural incomes. Single-nutrient fertilizers will remain the dominant type, while multi-nutrient fertilizers will grow much faster. This study analyzes the 79 million metric ton agricultural fertilizer industry in China, with forecasts to 2015 and 2020 by product, crop and region. The study also evaluates company market share and profiles industry participants.

#2870 ..... June 2012 ..... \$5400

**Lawn & Garden Consumables**

US packaged lawn and garden consumables demand will rise 3.3 percent yearly to \$8.8 billion in 2016. Pesticides and fertilizers will remain the top segments, with fertilizers, seeds and growing media the fastest growing. Organic formulations will outpace conventional types, but from a much smaller base. This study analyzes the \$7.5 billion US lawn and garden consumables industry, with forecasts for 2016 and 2021 by product, formulation, market, application, end user and US region. The study also evaluates company market shares and profiles industry players.

#2891 ..... May 2012 ..... \$5100

**Pesticides**

US demand for formulated pesticide products is forecast to increase 2.6 percent per year to \$12.1 billion in 2016. Gains will be driven in part by rising demand for new formulations used in multiple settings. Herbicides will remain the largest product segment and show the strongest growth. The agricultural market will remain dominant and grow the fastest. This study analyzes the \$10.7 billion US pesticides industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry competitors.

#2877 ..... April 2012 ..... \$4800

**Agricultural Pesticides in China**

Demand for formulated pesticides in the agricultural market in China is forecast to increase 5.3 percent per annum to 2.3 million metric tons in 2015. Insecticides will remain the dominant product type while fungicides will grow the fastest. This study analyzes the 1.8 million metric ton agricultural pesticides industry in China, with forecasts for 2015 and 2020 for formulated pesticides and pesticide active ingredients by type, class, crop and geographic region. The study also evaluates company market share and profiles industry participants.

#2850 ..... April 2012 ..... \$5400

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