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Home & Garden Pesticides

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

Study #2947 | October 2012 | \$4900 | 232 pages

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Increased spending on lawn and garden maintenance as a way to increase home values, as well as consumer concern for environmentally-friendly products, will stimulate US growth.

US demand to grow 3.2% per annum through 2016

Demand in the US for home and garden pesticides is projected to rise 3.2 percent per year to \$2.3 billion in 2016. Healthy growth in household applications will be promoted by consumers' increased awareness of pest-borne diseases such as the West Nile virus, and by continued problems with aggressive insects such as bed bugs and red imported fire ants. However, gains will be hindered by the overall maturity of the market, as the majority of households in the US already use at least one pesticide product and many are wary of potential health hazards associated with pesticides.

Demand to be fueled by less toxic, ready-to-apply formulations

While active ingredients like 2,4-D, glyphosate, malathion, carbaryl, and DEET (N,N-diethyl-meta-toluamide) remain some of the most commonly used products in home and garden pesticides, the market has been undergoing a shift in product mix that can be seen in two different trends. First, a growing level of environmental awareness has led to increased availability of less toxic and/or naturally derived pesticides. The other major shift has been the increased presence of ready-to-apply formulations. Most of these products have very low levels of active ingredients, and derive most of their value from the traits that make them especially convenient, such as special formulations and packaging.



Increased consumer spending, environmental concerns to revive growth

In lawn and garden applications, gains represent a rebound from the 2006-2011 period, which was characterized by sluggish growth as consumers were impacted by the recession. Growth will be promoted by increased spending on lawn and garden maintenance as a way to increase home values, in addition to continued interest in do-it-yourself yard activities, especially in lawn care and edible gardening. Public health and environmental concerns, in addition to expectations regarding product efficiency and ease of use, are strong drivers of consumer demand and producer innova-

tion. Lawn and garden pesticide demand is influenced by the fact that many communities put a great deal of emphasis on having well-groomed yards that require proper pest management in gardens, lawns, and other outdoor areas.

For household applications, many consumers are motivated by the health concerns posed by household pests such as rodents, mosquitoes, and other insects. Consumers expect that home and garden pesticide products will be effective, easy to use, and safe for use around people and pets. It is also becoming increasingly important that these products have no adverse environmental effects, including impacts on air, water, soil, and non-target organisms.

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Sample Text, Table & Chart

APPLICATIONS

Insect Repellent: Demand -- Demand for household repellents, including those applied to persons and pets, is expected to reach \$1.5 billion in 2016. Insect repellent demand is expected to grow at an average growth due to the spread of West Nile virus and the disease, Rocky Mountain spotted fever. These diseases have contributed to growing concerns among people to use personal repellents. Additionally, heightened concerns about the potential effects of insecticides are prompting many consumers to replace insect-killing products with repellents. Gains will also be boosted by the emergence of new repellent products, particularly those not based on DEET (N,N-diethyl-meta-toluamide).

Insect repellents have been used by consumers for over 50 years. The first widely used repellent was DEET, which was developed for use by the US Army. DEET remains the leading insect repellent active ingredient, although some consumers dislike the smell and feel of DEET-based insect repellents. DEET is the active ingredient in OFF! and a variety of other repellent products, including private label brands. Consumer concerns about the safety of DEET's usage have persisted, but the EPA has maintained that DEET-based repellents are safe when used correctly, which is often a complicating factor for consumer pesticide safety, as consumers are not always compliant with product use instructions. DEET-containing products are available at varying concentrations and in a variety of formats, including lotions, creams, gels, and sprays (both aerosols and non-aerosols). Picaridin, the most common alternative to DEET, is found in Spectrum Brands' CUTTER and a number of other products. Some conventional insecticides, such as permethrin, allethrin, and metofluthrin, are also registered as insect repellents.

TABLE III-3

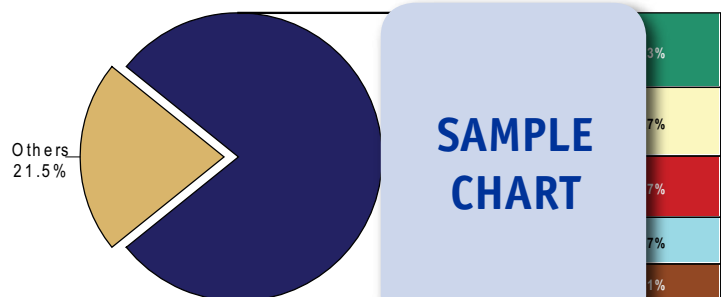
HOME & GARDEN PESTICIDE DEMAND BY FORMULATION
(million dollars)

Item	2001	2006	2011	2016	2021
Home & Garden Pesticide Demand	1,000	1,200	1,400	1,600	1,800
By Concentration:					
Ready-To-Apply	600	700	800	900	1,000
Concentrated	400	500	600	700	800
By Type:					
Liquid	300	350	400	450	500
Aerosol	200	250	300	350	400
Granular	100	120	140	160	180
Powder	50	60	70	80	90
Other	50	60	70	80	90

SAMPLE
TABLE

CHART VI-1

US HOME & GARDEN PESTICIDE MARKET SHARE
(\$2.0 billion, 2011)

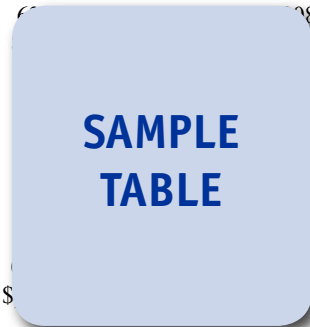


SAMPLE
CHART

Sample Profile, Table & Forecast

TABLE V-6
HOME & GARDEN PESTICIDE INERT INGREDIENT DEMAND BY TYPE
 (million pounds)

Item	2001	2006	2011	2016	2021
H & G Pesticide Raw Materials % inert ingredients					8
H & G Pesticide Inert Ingredients					
Minerals					
Surfactants					
Solvents					
Other					
\$/lb					
H & G Pesticide Inert Ingredients (mil \$)					



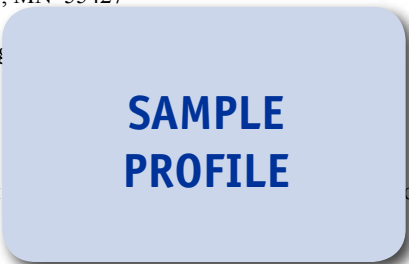
COMPANY PROFILES

McLaughlin Gormley King Company

8810 10th Avenue North
 Golden Valley, MN 55427
 763-544-0341
<http://www.mgk.com>

Annual Sales:
 Employment:

Key Products: pyrethroid-based insecticides



McLaughlin Gormley King (MGK) is a privately held producer of insect control chemicals, including natural pyrethrum and synthetic pyrethroids. In addition to raw chemical ingredients, the Company supplies manufacturing-use intermediates and formulated insect control products, including insecticides, repellants, and synergists. MGK's products are used in a variety of markets, including agricultural pest control, structural pest control, industrial and institutional, consumer home and garden, vector control, and veterinary. The Company is 32.9 percent owned by Sumitomo Chemical Company Limited (Japan), itself a subsidiary of Sumitomo Corporation (Japan).

The Company participates in the US home and garden pesticides industry through the manufacture of natural pyrethrum- and synthetic pyrethroid- based insecticides. These products are used to make insecticides for lawn and garden, household, industrial, and other applications. MGK also produces intermediates, including EXPONENT insecticide synergist, which is formulated to boost the effectiveness of insecticides. Insecticides formulated for consumer home and garden use are sold by the Company under such brand names as EVERCIDE, MGK, MULTICIDE, NYLAR, and PYROCIDE.

"Demand for minerals as inert ingredients in home and garden pesticides is forecast to increase 1.3 percent annually to 409 million pounds in 2016. Gains will be boosted by the continued popularity of granular herbicides, insecticides, and other pesticides, particularly for use in lawn and garden applications. Although granular and powder formulations account for a smaller share of total demand in value terms than liquid pesticides, liquid pesticides usually have a very high ..."
 --Section V, pg. 119

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OTHER STUDIES

World Agricultural Pesticides

World demand for formulated agricultural pesticides is forecast grow 3.8 percent annually through 2016 to \$59 billion. The fastest growth is expected in developing countries of Eastern Europe, South America, and Asia. Product demand will benefit from more value-added pesticide formulations with multiple active ingredients. This study analyzes the \$49 billion world agricultural pesticide industry, with forecasts for 2016 and 2021 by product, market, world region and for 43 countries. The study also evaluates company market share and profiles industry participants.

#2902 August 2012 \$6200

World Agricultural Equipment

World demand for agricultural equipment is expected to increase 6.8 percent per year through 2016 to \$175 billion. The Asia/Pacific region -- led by China and India -- will be the fastest growing market, followed by Central and South America. Plowing and cultivating machinery will be the fastest growing product type. This study analyzes the \$126 billion world agricultural equipment industry, with forecasts for 2016 and 2021 by type, world region and for 20 major countries. The study also evaluates company market share and profiles industry participants.

#2892 June 2012 \$6100

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 222.5 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

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

About The Freedonia Group

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