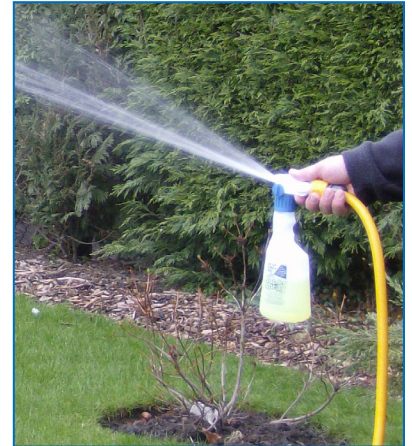


Home & Garden Pesticides

US Industry Study with Forecasts for 2020 & 2025

Study #3384 | February 2016 | \$5200



US demand for home and garden pesticides is projected to see modest annual gains through 2020. In the lawn and garden segment, gains will be supported by ongoing growth in new housing completions and by increasing consumer spending on and interest in lawn care and gardening. Gains will be further buoyed by the ever-expanding availability of ready-to-use products in convenient packaging. In household applications, increasing consumer awareness of mosquito-borne diseases will promote greater demand for insect repellents. In addition, some regions of the US are seeing populations of bedbugs and other household pests that are increasingly resistant to older insecticide formulations, creating a need for new, more aggressive formulations that are also safe to use.

Market to favor environmentally friendly, easy-to-use pesticides

Products with reduced negative health and environmental impacts and products that emphasize ease of use will post the best growth going forward. Biopesticide demand will continue to grow faster than demand for conventional pesticides. Likewise, concentrated products that must be diluted before use will lose market share to ready-to-use formulations and products that emphasize convenience.

Insecticides to remain dominant household pesticide

Insecticides account for the majority of pesticides used in the home and garden market, and are expected to continue to do so for the foreseeable future. Insecticides' prominence is largely due to their use in household

applications, where insect controls and insect repellents are by far the most common pesticides in use. Insecticides also represent a sizable share of the lawn and garden segment, although herbicides are the larger product category in these applications. The best opportunities for growth in insecticide demand are expected for products that have less concentrated toxins, do not harm beneficial insects such as honeybees, and have packaging that reduces user exposure to the pesticide.

Herbicides to remain largest lawn & garden pesticide

Herbicides will remain the largest product category in lawn and garden applications. Gains will be fastest for products used in gardening activities, including ornamental and edible gardening. The greater variety of ready-to-use products, combination herbicide and fertilizer formulations, and products tailored for specific types of gardens will support growth going forward. Convenient products such as herbicides that can be attached directly to a hose will also promote gains in lawn and turf care applications. Herbicides for use on sidewalks and driveways are projected to show the slowest growth due to market maturity.

Study coverage

This study examines US demand for home and garden pesticides. It presents historical demand data (2005, 2010 and 2015) plus forecasts (2020 and 2025) by product, application, and raw material. The study also considers market environment factors, evaluates company market share, and profiles 26 industry players.

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PRODUCTS

Conventional Pesticides & Biopesticides

Pesticides are categorized in several ways, including classification by target organism, chemical composition, formulation type, concentration, and toxicity to non-target organisms. The most common organizational method is by broad classification of target organisms, making herbicides, insecticides, and fungicides the most familiar types of pesticides, and the primary basis of product organization within this sector. Rodenticides and a handful of other small-volume products are also included in home and garden applications.

Pesticides can also be categorized as conventional pesticides (synthetic, but not always, synthetic chemicals) or biopesticides (derived from natural sources, such as bacteria or plant oils). Most pesticides used in organic gardening are biopesticides, but some conventional pesticides have been approved for inclusion in the National List maintained by the National Organic Standards Board.

Despite strong growth in demand for naturally derived pest control products, biopesticides will account for only eight percent of all demand in the home and garden pesticide market, which has a strong influence on pesticide research and development. As a result, new biopesticide active ingredient registrations have been outpacing registrations of conventional active ingredients, as pesticide makers involved in all three major markets contributing to research.

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TABLE IV-2

HOUSEHOLD APPLICATIONS FOR HOME & GARDEN PESTICIDES (million dollars)

Item	2005	2010	2015	2020	2025
Households (mil)					
\$ pesticide/household					
Household Pesticide Demand					
By Application:					
Insect Control					
Insect Repellents					
Other					
By Concentration:					
Ready-to-Apply					
Concentrated					
By Formulation:					
Liquid					
Aerosol					
Granular					
Powder					
Other					
% household					
Home & Garden Pesticide Demand					

Source: The Freedonia Group

TABLE V-5

HOME & GARDEN FUNGICIDE & OTHER ACTIVE INGREDIENT DEMAND (million pounds)

Item	2005	2010	2015	2020	2025
H & G Pesticide Active Ingredients					
% fungicide & other					
H & G Fungicide & Other Actives					
Fungicides					
Rodenticides					
Animal Repellents					
Fumigants					
All Other Active Ingredients					
\$/lb					
H & G Fungicide & Other Actives (mil \$)					

Source: The Freedonia Group

This study can help you:

- Determine your market & sales potential
- Learn more about industry competitors
- Assess new products & technologies
- Identify firms to merge with or acquire
- Complement your research & planning
- Gather data for presentations
- Confirm your own internal data
- Make better business decisions

Related Studies

World Flavors & Fragrances

Global demand for flavors and fragrances is forecast to grow 3.9 percent annually, reaching \$26.3 billion in 2020. Flavor blends will remain the largest segment, while essential oils and natural extracts will grow the fastest. The Asia/Pacific and Africa/Mideast regions will be the fastest growing markets. This study analyzes the \$21.7 billion market for world flavors and fragrances, with forecasts for 2020 and 2025 by product and market for six world regions and 20 major countries. The study also evaluates company market share and profiles industry participants.

#3397..... March 2016..... \$6300

Amines

US demand for amines will expand 2.1 percent per year to 3.2 billion pounds in 2019, valued at \$3.8 billion. Agricultural chemicals will remain the fastest growing market, driven by increased use of herbicide-resistant crops that require greater amounts of amine-based pesticides. Polyetheramines and alkylamines will be the fastest growing products. This study analyzes the 2.9 billion pound US amines industry, with forecasts for 2019 and 2024 by product and market. The study also evaluates company market share, and profiles industry players.

#3330..... October 2015..... \$5200

World Lawn & Garden Consumables

World demand for lawn and garden consumables will rise 3.7 percent annually to \$19.5 billion in 2019. North America will remain the dominant market, while the Asia/Pacific region will grow the fastest. Seeds and growing media will be the fastest growing segments, while fertilizers and pesticides remain the largest. This study analyzes the \$16.3 billion world lawn and garden consumables industry, with forecasts for 2019 and 2024 by product, market, world region, and for 16 major countries. The study also evaluates company market share and profiles industry participants.

#3265..... March 2015..... \$6200

Biocides

Demand for specialty biocides in the US is forecast to rise 4.0 percent per year to \$3.9 billion in 2018. A construction rebound will benefit the wood preservation and paint and coatings markets, while consumer spending and manufacturing gains will support uses in manufactured goods. Nitrogen compounds and organosulfurs will be the fastest growing types. This study analyzes the \$3.1 billion US biocide industry, with forecasts for 2018 and 2023 by product, function and market. The study also evaluates company market share and profiles industry competitors.

#3211..... September 2014..... \$5300

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- Establishing consistent economic & market forecasts
- Using input/output ratios, flow charts & other economic methods to quantify data
- Employing in-house analysts who meet stringent quality standards
- Interviewing key industry participants, experts & end users
- Researching a proprietary database that includes trade publications, government reports & corporate literature

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