

Professional Pest Management Markets for Pesticides 2011:

U.S. Market Analysis and Opportunities

4th Edition (of large sample study)

To Be Published 2nd Quarter 2011

Base Year: 2010

This analysis will provide professional pest management suppliers and formulators with the latest information on product usage in the following key end-use market segments:

- Termite control (subterranean and drywood)
- General insect control
 - Cockroach control
 - Ant control
 - Bed bug control
 - Rodent control
 - Flea control
 - Other insects/occasional invaders

Unique to this report, Kline will report on volumes of active ingredients used by active ingredient

Within each of these insect categories, the report details will include:

- Sales by brand, region, and supplier
- Active ingredient volumes used
- Supplier sales totals by brand
- Customer loyalty ratings for key brands
- Sales breakdowns for
 - Interior vs. exterior applications
 - Food handling vs. non-food handling
 - Application type

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Report Scope

Professional Pest Management Markets for Pesticides 2011: U.S. Market Analysis and Opportunities will provide an accurate and independent appraisal of the market size and segmentation of key pest segments, and market trends in the U.S. professional pest management markets in 2010.

The study will focus primarily on the sales of pesticides used to treat the following insects and rodents:

- Termite control (subterranean and drywood)
- General Insect control
 - Cockroach control
 - Ant control
 - Bed bug control
 - Rodent control
 - Flea control
 - Other insects/occasional invaders

In addition, this study will provide a look at customer loyalty to the products PMPs are using. The two questions most often used to gauge loyalty are 1) intent to repurchase and 2) willingness to recommend purchase to a friend. The first two brands used in each product category will be measured for loyalty on the part of users. Any respondent who shows low levels of reuse or willingness to recommend will be asked to give reasons for his response. In this way, we will be able to deliver an assessment of the brand's future outlook for increasing market share.

Key Benefits

This report will serve as an excellent resource for manufacturers and formulators of pest management related pesticides. Specifically, this report will assist subscribers by providing:

- A highly reliable and independent assessment of the brand share sales for professional pest management pesticides segmented by pest treated
- Aid with regulatory filings by providing volumes of active ingredient by brand and by pest treated
- Key product usage patterns for each specific market segment, including indoor vs. outdoor treatments and food handling vs. non-food handling applications
- Provide loyalty ratings for key products used to treat each pest covered

Subscribers to this study will have unlimited access to Kline's proprietary FutureView Scenario Forecasting Model. This interactive model will provide forecast of the future size of the professional turf and ornamental pesticide and fertilizer market, broken down by segment and product type. Subscribers will be able to run numerous "what if" scenarios by making changes to supply and demand forecast assumptions.

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Tentative Report Contents

1. INTRODUCTION

Will include project scope, information sources, methodology, and definitions

2. EXECUTIVE SUMMARY

An overview of the report findings plus forecasts based on Kline's FutureView Scenario Forecasting Model

3. PMP BUYER PROFILE

- Number of interviews by state and region
- Number of employees per company by region
- Average expenditures for chemicals by number of employees by region
- Services offered by region
 - General pest control (roaches, ants, bed bugs, fleas, other)
 - Termites (subterranean, drywood)
 - Rodenticides
 - Others
- Total expenditures on chemicals by region
- Percentage of revenue by commercial vs. residential applications
- Percentage of revenue by food handling vs. non-food handling applications
- Percentage of revenue by service type
 - Termite
 - General pest control
 - Rodent control
 - Other
- Average total revenue by number of employees by region
- Most important insects by region/state
- Current control needs by pest

4. SUBTERRANEAN TERMITE CONTROL MARKETS

- Pre-treatment applications
 - Quantity and sales by brand for pre-treatment applications
 - Number of structures treated
 - Average service revenue per application
 - Use of, brand, and quantity of monitoring devices
 - Customer loyalty ratings
- Post-treatment applications
 - Sales by brand, region, supplier, and termite species
 - Number of structures treated
 - Average service revenue per applications
 - Baits
 - Concentrates
 - Spot treatments vs. complete treatments
 - Sales by termite species
 - Applications that result in call-backs
 - Firms offering baits, concentrates, or both types of applications
 - Applications with baits vs. concentrates
 - Amount of active ingredient used by chemical
 - Customer loyalty ratings

5. DRYWOOD TERMITE CONTROL MARKETS

- Percentage of firms offering only drywood termite control and both drywood and subterranean termite control
- Firms that subcontract applications
- Sales by brand, region, and supplier
- Customer loyalty ratings

6. GENERAL INSECT CONTROL MARKETS

The following information will be supplied for ants, cockroaches, bed bugs, fleas, and other insects:

- Most difficult species to control?
- Typical control program consist of?
- Average treatment charge?
- Number of treatments included in annual service?
- Sales by
 - Brand
 - Region
 - Species
 - Supplier
 - Interior vs. exterior
 - Food handling vs. non-food handling (where appropriate)
- Volume of active ingredient used by ai
- Customer loyalty ratings

7. RODENT CONTROL MARKETS

- Percent of firms offering rodent control
- Percent of treatments for mice, rats, others
- Control methods used
- Common control problems
- Sales by brand, region, species, and supplier
- Customer loyalty ratings

8. OTHER PEST TREATED

- Pest treated
- What does typical treatment program consist of
- Average treatment charge
- Sales by
 - Brand
 - Region
 - Supplier
 - Interior vs. exterior
 - Food handling vs. non-food handling (where appropriate)

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline will conduct approximately 800 structured interviews with pest management professionals. In addition, Kline's professional staff of industry experts will conduct in-depth discussions with a wide range of knowledgeable industry participants and opinion leaders to support our research efforts.

This approach has proven to be the most effective and reliable way of obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research will represent the bulk of our research efforts, supported by secondary research drawn from the various available sources.

Kline Credentials

Kline is a worldwide consulting and research firm dedicated to providing the kind of insight and knowledge that helps companies find a clear path to success. The firm has served the management consulting and market research needs of organizations in the chemicals, materials, energy, life sciences, and consumer products industries for 50 years.

Kline's research and consulting services extend across the entire agricultural and specialty pesticides industry value chain. Our solutions have helped clients develop better ways to create and profit from new business opportunities, respond to competitive and economic threats, improve productivity, achieve sustainable growth, and optimize performance. Kline provides clients with facts, forecasts, and recommendations based solidly on the realities of the market.

Our market research reports and services are designed to provide subscribers with a deeper understanding of their markets, an outlook for their business, and accurate information about their competitors. Our clients tell us they often use Kline's market research to validate their own internal analysis, and many clients rely on Kline reports as their most critical source of information.

For more information about this study or Kline's other services, e-mail us at sales@klinegroup.com, visit our website at www.KlineGroup.com, or contact us at any of our regional offices listed below.

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Recently published or in-progress research for the Agriculture/Specialty Pesticides industry includes:

- The U.S. Industrial Vegetation Management Market for Pesticides and Fertilizers 2010
- Consumer Markets for Pesticides and Fertilizers 2010
- Global Nematicides Market 2010: Market Analysis and Opportunities
- Seed Treatment 2010 Global Series: Market Analysis and Opportunities
- Specialty Pesticides 2009: Multi-Region Series
- Professional Mosquito Control Insecticides 2009: U.S. Market Analysis and Opportunities
- Stored Grain Insect Control 2009: U.S. Market Analysis and Opportunities
- Pest Control in Food Handling Establishments 2009: U.S. Market Analysis and Opportunities
- Post-Harvest Disease Control for Fruits and Vegetables 2009: U.S. Market Analysis and Opportunities