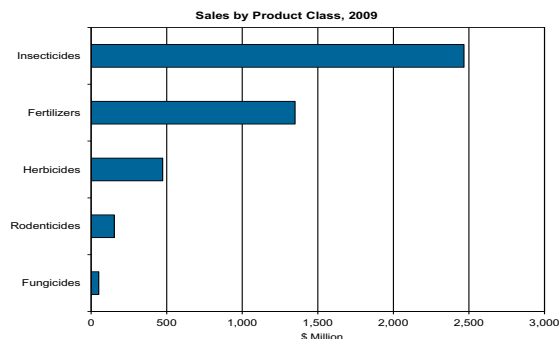


# Consumer Markets for Pesticides and Fertilizers 2010: U.S. Market Analysis and Opportunities

## 2011 Fact Sheet

### The Market

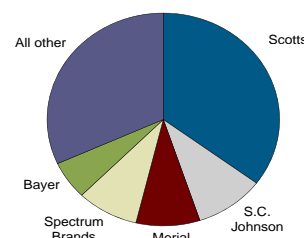
Total U.S. sales of products in the pesticides and fertilizers market are estimated at \$4.5 billion in 2009, up from \$4.3 billion in 2007. Product category sales changed at significantly different rates during the period as a result of the influence of specific weather conditions, new product introductions, increasing concerns over the West Nile virus, significant fertilizer price increases, and various other factors.



### Companies

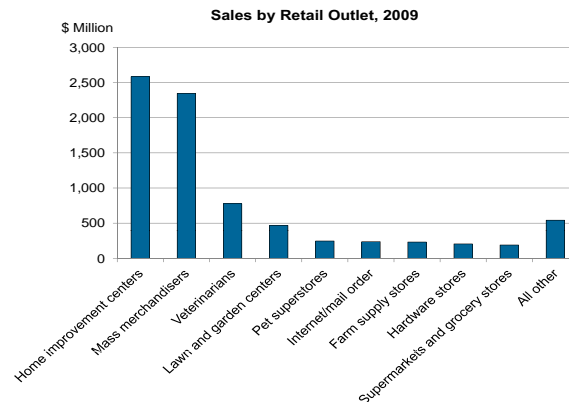
The 12 largest suppliers of consumer pesticides and fertilizers represent only a small percent of the companies active in the industry, but they accounted for approximately 86% of total sales in 2009, the same as 2007. The level of competition is generally high and profit margins are comparatively thin because of this.

**Market Share of Top Five Companies, 2009**



### Retail Channels

Home improvement centers are the leading retail outlets for these products, accounting for over 33% of sales in 2009, up from 29% in 2007. Retail outlets such as Kmart, Walmart, Home Depot, and others are now demanding to deal directly with manufacturers of consumer pesticides and fertilizers.



### Future Outlook

Under the most likely scenario, the overall market is expected to grow at the annual rate of 2.6% by 2013, from \$4.3 billion in 2007 to \$5.0 billion. Opportunities for significant individual growth in sales are greatest for marketers that can either: (1) identify new consumer applications for existing products; or (2) commercialize new active ingredients in consumer markets.

**Historical and Forecast Growth of the U.S. Consumer Pesticides and Fertilizers Industry**

