

Nematicides 2007:

U.S. Market Analysis and Opportunities

2nd Edition

Published December 2007

Base Year: 2007

A comprehensive analysis of infestation and chemical use to treat against nematodes, focusing on key trends, developments, changes, challenges, and business opportunities and addressing such issues as:

- What crops account for the largest amount of nematicide expenditures?
- What crops account for the majority of the methyl bromide usage?
- What crops are most likely to increase and decrease nematicide usage within the next five years?
- What is the potential impact in this market from the registration of Iodomethane (MIDAS)?
- Who are the market leaders for nematicides?

Includes access to Kline's *FutureView Scenario Forecasting Model*.

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Report Scope

The second edition of this study covers four crop categories and 16 different crops and markets to determine the extent of recognized nematode damage, important nematode species, and the degree to which the damage is treated with cultural practices versus chemicals and fumigants. Sales and market share data by active ingredient for 2006 and 2007 are shown for each crop market. Estimates of active ingredient consumption and application rates are also provided.

The study provides subscribers with competitive intelligence on the key players in the agricultural/specialty pesticides market in the United States. It offers information and insights that enables subscribers to exploit business opportunities by understanding product developments, competitive forces, raw material formulation platforms, and future trends.

Key Benefits

Nematicides 2007: U.S. Market Analysis and Opportunities provides subscribers with detailed product use information relating to the current chemical and fumigant treatments to control nematodes in key crops along with their estimated volumes and sales values.

The report also provides a scenario-based forecast through the year 2012 that takes into account genetic resistance to nematodes, the withdrawal of NemaCur and possibly methyl bromide from the market, and available substitutes. The forecast provides detailed assumptions relating to new chemicals, potential for seed treatments, and projected acreage changes for the crop and their impact on each crop market.

Report Contents

1. INTRODUCTION

2. EXECUTIVE SUMMARY

3. TECHNOLOGY OVERVIEW

- Introduction
- Nematodes
- Infestation
- Control measures
- Botanical control methods and other nematicides
- Projects under development
- Ideal nematicide

4. FIELD CROPS

- 4A. Corn
- 4B. Cotton
- 4C. Soybeans

5. FRUIT

- 5A. Almonds
- 5B. Citrus
- 5C. Peaches and Other Stone Fruit
- 5D. Strawberries
- 5E. Walnuts

6. VEGETABLES

- 6A. Carrots
- 6B. Peppers
- 6C. Potatoes
- 6D. Sweet Potatoes
- 6E. Tomatoes

7. SPECIALTY CROPS

- 7A. Peanuts
- 7B. Sugar Beet
- 7C. Tobacco

For all of the sections in chapters 4 through 7, the following information is provided:

- Market background
- Acreage and yield
- Cost of production
- Nematode problems
- Extension and grower awareness
- Control measures
- Potential for nematicides
- Assumptions

APPENDICES

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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's professional staff of industry experts conducted in-depth discussions with a wide range of knowledgeable industry participants and opinion leaders, including extension nematologists; agronomists; plant pathologists; seed, sugar, and crop protection companies; regulatory agencies; USDA ARS; and nurseries.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. For this study, primary research included 85 in-depth interviews. Additional information was obtained from other resources including NASS crop data, the California DPR database, and other sources.

In addition, this analysis was supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and statistical data from government, industry, and trade associations.

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 nearly 50 years.

Kline's research and consulting services extend across the entire agriculture 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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- Global Markets for Specialty Pesticides, 2006-2007
- Professional Turf and Ornamental Markets for Pesticides and Fertilizers USA 2007
- The U.S. Market for Invasive Weed Control Products 2007
- Consumer Markets for Pesticides and Fertilizers USA 2008
- The U.S. Market for Professional Mosquito Control Products 2008
- The U.S. Industrial Vegetation Management Market for Pesticides and Fertilizers 2008
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