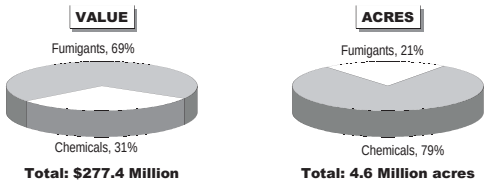
Nematicides 2007:
U.S. Market Analysis and Opportunities

Fact Sheet

The Market

The nematode control market in the United States, totaling $277 million and 4.6 million acres, is segmented into nematicidal chemicals such as aldicarb and oxamyl and fumigants such as methyl bromide. Fumigants account for 69% of the market value but just 21% of the area treated, due to the high cost per acre for fumigants. Chemical applications may target insects as well as nematodes.

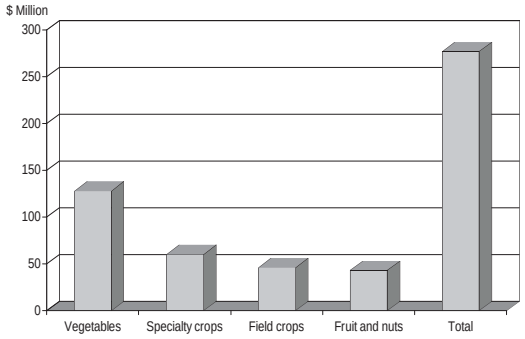
The U.S. Nematicide Market, 2005 to 2006



Crop Categories

Vegetables account for $128 million, or 46% of the nematode control market, down from $144 million in 2003, with the primary vegetable markets being potatoes, tomatoes, peppers, and carrots.

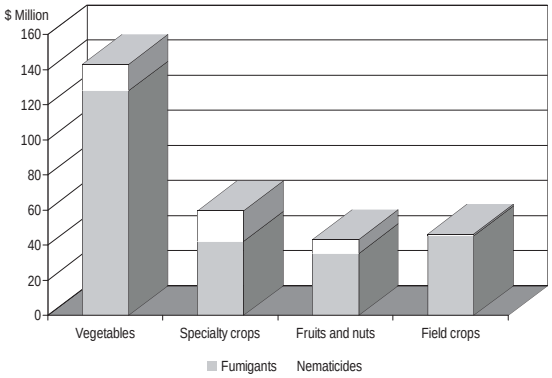
Market Value of Nematode Control by Crop Segment, 2005 to 2006



Controlling Nematodes

Two types of products are used to control nematodes: fumigants and chemical contact nematicides. Fumigants, available since the 1940s, move through soil to control weeds, pathogens, and nematodes. Contact nematicides are an older chemistry, mainly active on insect pests, with nematodes as a secondary pest.

Fumigant/Nematicide Market Split by Crop Category, 2005 to 2006



NOTE: Fumigant use is a function of crop value because of its high cost/acre.

Future Outlook

It is assumed that nematode resistance work will continue and will have an additional impact on the nematicide market within the next five years, especially in sugar beet and peanut markets. The availability of a seed treatment and the use of a nematode-tolerant variety may provide for early root development and cut aldicarb treatments by about 50%.

Projected Nematicide Forecast by Product Category, 2003 to 2012