

Seed Treatment 2009 Global Series:

Market Analysis and Opportunities

Published December 2009

Base Year: 2008

Regional Coverage

North America
Western Europe
South America
Asia-Pacific

A comprehensive analysis designed to provide crop protection suppliers with the latest information on the size, structure, and outlook for the seed treatment pesticide market in major country/crop markets across the globe.

Seed Treatment 2009 Global Series: Market Analysis and Opportunities

Report Scope

Seed Treatment 2009 Global Series: Market Analysis and Opportunities is a detailed analysis of and outlook for one of the most dynamic sectors in all of crop protection.

A number of converging trends make this the right time for this overview:

- As commodity prices remain at an all-time high for growers around the world, it makes even more sense for growers to invest in protecting their crops.
- As biotechnology advancements have increased the value of some field crop seed by introducing new traits, growers have demanded better protection of that seed to maximize their return on investment.
- At the same time, new active ingredients have been introduced that present new opportunities for seed protection.
- New insect-resistant genetic traits in corn and cotton have changed the spectrum of pests to protect against, resulting in niche markets for seed companies that treat seeds for insect protection.

This report focuses on the application of fungicides and insecticides, but also includes other treatments that may be applied as a way of protecting the seed and seedlings, as well as enhancements such as colorants. It reviews the most common seedling diseases for the crops being studied, address cultural practices and non-chemical control methods, and then focuses on the technologies and products used to treat seed prior to planting.

Most of the report focuses on off-farm treatment, but in cases where on-farm treatment is important, these treatments are covered as well.

Crops covered in the report are:

- Corn/maize
- Cotton
- Potatoes
- Rice
- Soybeans
- Sugar beets
- Wheat

Key Benefits

The report serves as an excellent reference for developing and executing marketing plans. It provides:

- Estimates of market sizes and outlook for 23 crop/country market segments
- A highly reliable and independent assessment of the competitive positions of the major seed treatment suppliers in terms of product sales and market share
- Management-level insights into the reasons for treatment, the key insects and diseases being treated, and the leading products in each segment
- For marketers interested in increasing their penetration into seed treatment, we will provide an assessment of strengths and weaknesses for current products and a tabulation of unmet needs provided by our respondents
- For product developers, we will provide an overview of the cultural practices used by growers to produce and market their crops, the role of seed treatment, and opportunities to establish or increase market penetration

Seed Treatment 2009 Global Series:

Market Analysis and Opportunities

Report Contents

1. **INTRODUCTION**
2. **EXECUTIVE SUMMARY**
Includes forecasts generated with Kline's FutureView Scenario Forecasting Model.
3. **TECHNICAL OVERVIEW**
 - Description of diseases, insects, nematodes, and other reasons seeds are treated to control; control options; current active ingredients and select products under development
 - Product formulations, rates, and application issues and opportunities
 - Combination products
 - Seed treatment methods
 - Interface between seed treatment and biotechnology
4. **APPLICATIONS AND MARKET SEGMENTATION**
 - 4A. Canada
 - 4B. Mexico
 - 4C. United States
5. **WESTERN EUROPE**
 - 5A. France
 - 5B. Germany
 - 5C. Italy
 - 5D. United Kingdom
6. **SOUTH AMERICA**
 - 6A. Argentina
 - 6B. Brazil
7. **ASIA-PACIFIC**
 - 7A. Australia
 - 7B. Japan

Each country section contains the following topics for the crops listed in Table 1:

 - Crop background
 - Planted acres
 - Crop end use by acres or volume; regional differences within countries
 - Production and crop protection methods
 - Key seed suppliers and their product compatibility with treatment
 - Role of seed treatment as crop protection method
 - Key diseases, insects, nematodes, and other reasons seeds are currently treated to control; regional differences within countries
 - Non-chemical alternatives
 - Sanitation
 - Biocontrols
 - Biotechnology
 - Chemical treatment methods for target diseases and insects
 - Foliar
 - Soil at planting
 - Seed treatment
 - Product sales and market share for seed treatment products
 - Active ingredient use for seed treatment products
 - Sales by company for seed treatment products
 - Crop seed treatment outlook and assumptions for market forecast

Table 1
Country/Crop Coverage

Region/country	Corn/maize	Soybeans	Wheat	Potatoes	Rice	Sugar beet	Cotton
ASIA-PACIFIC							
Australia			X				
Japan					X		
WESTERN EUROPE							
France	X		X	X		X	
Germany				X		X	
Italy				X		X	
United Kingdom				X		X	
NORTH AMERICA							
Canada			X				
Mexico	X						
U.S.	X	X	X	X			X
SOUTH AMERICA							
Argentina	X						
Brazil	X	X					X

Seed Treatment 2009 Global Series: Market Analysis and Opportunities

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 and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including dealers, consultants, crop advisors, seed companies, and growers, to develop a detailed understanding of each seed treatment crop/country market segment. This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities.

Primary research represents the bulk of our research efforts, supplemented by secondary research drawn from the review of suppliers' product literature and price lists, a search of recent trade and technical literature, and Internet 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 over 50 years.

Kline's research and consulting services extend across the entire personal care 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.

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

- The U.S. Industrial Vegetation Management Market for Pesticides and Fertilizers
- Consumer Markets for Pesticides and Fertilizers USA
- Miticides: U.S. Market Analysis and Opportunities
- Nematicides: U.S. Market Analysis and Opportunities
- Professional Turf and Ornamental Markets for Pesticides and Fertilizers USA
- The U.S. Market for Fly Control Pesticides in Production Animal Health
- The U.S. Market for Invasive Weed Control Products

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.

North America

+1-973-435-6262

Latin America

+55-11-3079-0792

Europe

+32-2-770-4740

Japan

+81-3-3242-6277

Asia

+86-21-5382-6677

India

+91-124-4546-100

Seed Treatment 2009 Global Series: Market Analysis and Opportunities

Ordering Information & Contract

The standard subscription includes:

- Unlimited enterprise-wide online access to contents via MyKline.com
- Downloadable PDF files of contents via MyKline.com
- Direct access to the project team
- 1 day of consultation time to be used within six months of the publication date

Prices do not include sales tax. (NJ add 7% sales tax on hard copy purchase only.) Ground shipping within the contiguous U.S. is included in the subscription price. Overnight and international shipping are available for an additional fee and will be added to the total amount. This study is available by subscription only. Once the study is launched, you will be invoiced for the full amount, payable within 15 days upon receipt of the invoice. Expenses related to any travel made at the request of the subscriber are to be reimbursed by the subscriber.

An authorized signature agreeing to the subscription terms below is necessary to confirm your order.

We agree that, for a period of three years after its date of issue, we will: (1) restrict its circulation to employees of our corporation, to subsidiaries and joint ventures in which our corporation holds more than a 50 percent interest, or to any parent organization that holds more than a 50 percent interest in our firm; (2) use all reasonable precautions to prevent the disclosure of its contents to any other persons or organizations. We may however use or disclose any information in this report that is public knowledge, that was already in our possession before receipt of the report, or that comes to us from third parties independently of this report. Kline & Company, Inc. similarly agrees that it will use all reasonable precautions to prevent the disclosure of the contents of this report to any person or organizations other than subscribers for three years after its date of issue. We understand that this agreement is fully binding on the corporation and non-cancelable.

We have indicated our subscription preferences on the following page.

We have completed and signed this subscription agreement. Please indicate your acceptance of this subscription by countersigning and returning one copy for our files.

COMPANY _____	
SIGNATURE _____	DATE _____
NAME _____	
TITLE _____	
E-MAIL _____	
PHONE _____	

Send invoices to:

NAME _____
TITLE _____
ADDRESS _____

E-MAIL _____
PURCHASE ORDER # _____

Shipping address (if different than billing address):

NAME _____
TITLE _____
ADDRESS _____

E-MAIL _____

Kline use only:

ACCEPTED _____
SIGNATURE _____
NAME _____
TITLE _____
DATE _____

METHOD OF PAYMENT:

Send invoice



Card #: _____ Exp. Date: _____

Name (as it appears on credit card): _____

Fax the signed agreement to **+1-973-435-3395**
or e-mail to **orders@klinegroup.com**

Signature (for credit card authorization): _____

SUBSCRIPTION OPTIONS AND RATES

Volume	Standard price	Amount (please fill in price)
FULL-SERVICE PROGRAM	US\$ 105 000	
	Hard copies: _____ @ US\$ 500 each =	
North America	US\$ 38 300	
	Hard copies: _____ @ US\$ 500 each =	
Western Europe	US\$ 39 700	
	Hard copies: _____ @ US\$ 500 each =	
South America	US\$ 26 500	
	Hard copies: _____ @ US\$ 500 each =	
Asia-Pacific	US\$ 21 500	
	Hard copies: _____ @ US\$ 500 each =	
	Subtotal	
	NJ add 7% sales tax on hard copy purchase only	
	TOTAL	
NOTE: All prices in U.S. funds.		

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.

North America
+1-973-435-6262

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

Japan
+81-3-3242-6277

Asia
+86-21-5382-6677

India
+91-124-4546-100