

Global Nematicide Market 2010:

Market Analysis and Opportunities

2nd Edition

Published October 2010

Base Year: 2009

Regional Coverage

North America

Latin America

Eastern Europe

Western Europe

Africa/Middle East

Asia

This analysis will provide crop protection suppliers with the latest information on the size, structure, and outlook for the nematode treatment market in the major country/crop markets of the world:

Core Countries:

- United States
- Brazil
- Argentina
- Mexico
- France
- Germany
- Italy
- Spain
- United Kingdom
- China
- Japan
- South Africa

Proposed Crop Segments/Examples:

- Vegetables
- Specialty crops
- Fruits
- Row crops
- Other crops

Secondary Countries:

- Australia
- Costa Rica
- Ecuador
- Panama
- India
- Netherlands
- Turkey
- Philippines
- Turkey

NOTE: Full Service program includes both the core and secondary countries.

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Report Scope

Global Nematicide Market 2010: Analysis and Opportunities is a detailed analysis of this key segment of the agricultural market.

A number of trends and changes in this market make this the right time for this overview:

- As commodity prices level off from their historic highs, growers are looking for value in crop protection.
- As biotechnology advancements have increased the value of some field crop seed by introducing new traits, growers have demanded better protection of the seedling to maximize their return on investment.
- At the same time, new active ingredients have been introduced that present new opportunities for seed protection. This has led to the elimination of some soil insecticide applications that included nematicidal properties.
- New insect protection genetics in corn and cotton have changed the spectrum of pests to protect against, resulting in the need to rethink crop protection strategies.

This report focuses on the application of nematicides and other treatments that are used as a way of protecting crops from damaging nematodes. We have reviewed the most common nematodes affecting key crops in the countries being studied, addressed cultural practices and non-chemical control methods, and then focused on the technologies and products used to treat them.

Key Benefits

The report serves as an excellent reference for developing and executing marketing plans, providing subscribers with the following:

- Highly reliable and independent assessment of the competitive positions of the major suppliers of nematicides in terms of product sales and market share within each country
- Estimates of market sizes and outlook for 21 crop/country market segments, as shown in Table 1
- Insights into the reasons for treatment or the impact of non-treatment of key nematodes and the leading products in each segment
- A tabulation of unmet needs provided by our respondents for the key crops grown in each country
- For product developers, we provide a description of the cultural practices used by growers to control and/or prevent the build up of crop-damaging nematodes

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- Chemical Control
- Biological Control
- New Control Methods

5. NORTH AMERICA

- United States
- Mexico
- Costa Rica
- Panama

6. EUROPE AND AFRICA

- France
- Italy
- Netherlands
- Spain
- South Africa
- Turkey
- United Kingdom

7. SOUTH AMERICA

- Argentina
- Brazil
- Ecuador

8. ASIA-PACIFIC

- Australia
- China
- India
- Japan
- Philippines
- South Korea
- Thailand

Each country section contains the following topics for the crops covered in that country:

- Crop background
- Planted acres
- Nematode problems and type
- Resistant variety status
- Non-chemical alternatives
 - Cultural practices
 - Biocontrols
- Sales and market share by brand/active ingredient
- Sales by supplier
- Potential for nematicides
- Outlook and assumptions for market forecast

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Table 1: Country/Crop Coverage

	Vegetables-a	Fruits-b	Specialty crops-c	Field crops-d	Other crops-e
NORTH AMERICA					
United States	X	X	X	X	X
Mexico	X	X	X		
Costa Rica		X	X		
Panama		X	X		
EUROPE AND AFRICA					
France	X	X			
Italy	X		X		
Netherlands	X				X
Spain	X	X	X		X
South Africa	X	X	X		
Turkey		X	X		X
United Kingdom	X				X
SOUTH AMERICA					
Argentina		X	X		
Brazil	X	X	X	X	
Ecuador		X			
ASIA-PACIFIC					
Australia		X	X		
China	X	X			
India			X		
Japan	X	X	X	X	X
South Korea			X		
Philippines			X		
Thailand	X				

a- Includes potatoes, tomatoes, cole crops, onions, sweet potatoes, and cucurbits.

b- Includes grapes, citrus, strawberries, and bananas.

c- Includes tobacco, sugarcane, flowers, coffee, and peanuts.

d- Includes soybeans, cotton, and corn/maize.

e- Includes sugar beets and tea.

NOTE: Full Service program includes both the core and secondary countries.

Core countries are highlighted in green.

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Methodology

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

Kline conducted hundreds of interviews with dealers, consultants, crop advisors, seed companies, and growers to develop a detailed understanding of each seed treatment crop/country market segment. Interviews are conducted primarily both by Kline professionals and our affiliates.

A total of 21 country segments are analyzed in the report. The planned country/crop segmentation is shown in Table 1.

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 agriculture/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.

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

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

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