



# Crop Protection Manufacturers Report:

## A Strategic Market Analysis of the U.S. Crop Protection Industry

Published June 2018

Base Year: 2017

Forecasts to 2022

Regional Coverage: ■ North America

In 2017, low grain commodity prices continue to put pressure on grower management on treatments and cost of pesticides. Pesticide markets remained relatively flat, with some growth in herbicides. Planted acres of corn, cotton, pulse, and rice crops were up 6.8%, 17.4%, 17.0%, and 20%, respectively, while cereals, sorghum, and sunflowers were down 13.3%, 20.9%, and 14.1%, respectively. M&A continued moving forward with some product lines being spun off by majors to meet regulatory hurdles, including FMC acquiring some of DuPont's crop protection business in 2017.

### This Report Helps Subscribers to:

- Highlights into major decisions, actions, and company results for 2017
- New list of industry suppliers as M&A activity is constantly changing the supplier landscape.
- A review of the major drivers impacting the crop protection industry in 2017
- Events that have affected the performance of crop protection manufacturers in 2017
- Scenarios assessing potential impact on companies, products, technologies and industry structure to 2022 and beyond
- Ag retailer highlights and strategies as this segment of the industry continues to evolve



## Report Contents

### Introduction

### Executive Summary

- An overview of key findings

### Summary of 2017 U.S. Crop Protection Market

- Highlights of major industry events 2017
- One page highlights of each profiled company
  - Net 2016 sales vs. 2017
  - Key events taking place in 2017
- Market actions
- Strategic initiatives
- New product launches
- Significant registrations
- Acquisitions and divestitures
- Distributor channel changes
- Total net 2017 sales-top 20 U.S. companies
  - Chemicals: agricultural crop markets
  - Seed: treatments and coatings
  - Seed: products
- 2017 industry sales by product groups
  - Herbicides
  - Insecticides
  - Fungicides
  - Plant Growth Regulators
  - Fumigants, others
  - Seed treatment
  - Seed traits

### Strategic Change Drivers

- Overview of principal change drivers 2017-2022
  - Distribution channel restructuring
  - Branded vs. private label vs. generic products
  - New and emerging technologies
- Potential scenarios by company
  - Likely sales impacts from change drivers
  - Company sales outlooks: 2017-2022
  - Multiple scenario development of possible outcomes

### Manufacturer Profiles

Detailed profiles of 20 leading research-based and generic crop protection manufacturers, including the following information:

- Global business and sales
- Global crop protection sales
- U.S. crop protection business
- U.S. crop protection sales and product details by:
  - Herbicides
  - Insecticides
  - Fungicides
  - Plant growth regulators/other
  - Seed treatment
- Sales 2016 vs. 2017
- Brands active ingredient, patent status, target markets
- Review of new marketing initiatives
- Company profitability by EBIT
- 2017 business activity
  - Sales group activity
  - Distribution direction
  - Research and technology
  - Manufacturing
- Five- and 10-year business outlook



## Scope

This report provides a detailed independent assessment of the U.S. crop protection chemical market for 2017. Included in the report are 20 detailed profiles of the leading branded and generic crop protection chemical manufacturers operating in the United States.

- Detailed profiles of major research-based manufacturers
- Profile of leading generic chemical manufacturers
- Highlights into current company performances, including manufacturers' sales by product type and active ingredient
- Section highlighting major decisions, actions, and results 2017
- Strategic change drivers impacting the crop protection industry
- List of 600+ product brands and active ingredients
- Patent status and target market for each brand
- Product detail by seed traits
- Highlights that provide insight into current company performance

## Key Benefits

This report provides marketing managers with a reliable assessment of the overall performance of the U.S. crop protection industry in 2017.

- Develop business strategies by understanding the trends and developments that are driving the U.S. crop protection industry
- Provide a management toll to improve their perspective of the 2017 market situation and how the current situation may unfold over the next five years
- Understand the impact of generic manufacturers and their products
- View of the market from biotech seed traits perspective
- Understand importance of key active ingredients to manufacturers portfolio
- Seed treatment sales and market strategy by supplier



## Methodology

Kline’s approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 50-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives.

### Primary Research

#### We Know Who to Talk to. We Know How to Listen.



A high number of in-depth discussions are conducted by each analyst. All interviews are done with true industry insiders.

Kline’s analysts draw upon pragmatic experience to understand global impacts and local perspectives. Our interviews engage experts across all pertinent fields and sectors including:

- Marketers/manufacturers
- Distributors
- Government agencies
- Retailers
- Suppliers
- Trade organizations

### Secondary Research

#### We Know Where to Look – Mining the Details.



Analysis is further supplemented by secondary research, consisting of constant tracking of annual company reports, national statistics bureaus, trade/ industrial/professional associations, and the like.

Relevant developments are diligently followed and their impact closely monitored. Reports also draw upon non-confidential data from Kline’s internal database, consisting of over half a century’s syndicated research.

### Comprehensive Market Intelligence

#### We Know How to Verify.



Data are rigorously analyzed, cross-checked, distilled, and validated. Kline’s proven methodology allows exceptionally effective, precise, and reliable market

intelligence, giving subscribers a solid foundation on which to grow, refine, and expand their business with confidence.

## Kline Credentials

Kline is a leading global management consulting and market research firm offering the complete spectrum of services. 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.

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