



Seed Treatment:

Global Market Analysis and Opportunities

Published May 2019

Base Year: 2018

Forecasts to 2028

Regional Coverage: Asia-Pacific ■ Europe ■ North America ■ South America

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.

This Report Helps Subscribers by:

- Evaluating the seed treatment pesticide market for the leading crops globally
- Understanding which pest are seed treatment pesticides used to control by crop and country
- Providing a list of current polymers and seed coatings used by country and crop
- Including a list of plant nutrients used in seed treatment by country and crop, where applicable
- Providing sales by brand for the major seed treatment suppliers by country and crop



Report Contents

Introduction

Executive Summary

Includes forecasts generated with Kline's FutureView Scenario Forecasting Model.

Technical Overview

- Description of diseases, insects, nematodes, and other reasons seeds are treated; 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

North America

- Canada
- United States

Europe

- France
- Germany
- Russia
- Ukraine
- United Kingdom

South America

- Argentina
- Brazil

Asia-Pacific

- Australia
- China
- India

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 where appropriate
- 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 treated; regional differences within countries when appropriate
- Non-chemical alternatives
 - Sanitation
 - Biocontrols
 - Biotechnology
- Brand sales and market share for seed treatment products
- Sales by active ingredient use for seed treatment products
- Sales by company for seed treatment products
- Seed treatment outlook and assumptions by crop background

A database with the research results will be available to allow subscribers to create their own reports and sort the information any way they choose.



Table 1: Country/Crop Coverage 2018

Region/country	Corn/ maize	Soybeans	Wheat	Potatoes	Rice	Sugar beets	Cotton	Sunflowers	Canola/ rape-a	Sorghum	Other
NORTH AMERICA											
Canada	X	X	X						X		X
United States	X	X	X	X	X	X	X	X	X	X	X
EUROPE											
France	X	X	X	X		X		X	X		
Germany	X	X	X	X		X			X		
Russia	X	X	X			X		X	X		
Ukraine	X	X	X			X		X	X		
United Kingdom			X	X		X			X		
SOUTH AMERICA											
Argentina	X	X	X					X		X	
Brazil	X	X	x		X		X				
ASIA-PACIFIC											
Australia		X	X				X		X		
China	X	X	X		X			X	X		
India	X	X	X		X		X				



Scope

Seed Treatment: Global 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 somewhat depressed for growers around the world, it makes even more sense for growers to look at lower cost methods of 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.
- As biocontrol methods of protecting seed are becoming more readily available, growers are looking at the value of these controls versus the traditional seed treatment options.

This report focuses on the application of fungicides, insecticides, and nematicides including all biopesticides that may be applied as a way of protecting the seed and seedlings. Enhancement products such as polymers and colorants are also covered. The study reviews the most common seedling diseases, insects, and nematodes for the crops being studied. The report also addresses 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 this report are:

- Canola/oilseed rape
- Corn/maize
- Cotton
- Potatoes
- Rice
- Others
- Sorghum
- Soybeans
- Sugar beets
- Sunflowers
- Wheat

Key Benefits

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

- Estimates of market sizes and outlook for key seed treatment crops in 12 countries
- 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 provide an assessment of strengths and weaknesses for current products and a tabulation of unmet needs provided by our respondents
- For product developers, we provide an overview of the cultural practices used by growers to produce their crops, the role of seed treatment, and opportunities to establish or increase market penetration



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 procurement and assessment, 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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North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277