

# Crop Protection Manufacturers Report 2011:

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

**To Be Published April 2012**

**Base Year: 2011**

Kline & Company and Prochaska & Company welcome you to our annual report covering the marketing year for manufacturers in the U.S. crop protection industry.

*Highlights of the 2011 Manufacturers Report include:*

### Summary Company Highlights

- Lead section highlighting major decisions, actions and results in 2011
- Highlights that provide insight into current company performance

### Strategic Change Drivers

- Review of major drivers creating change in the industry
- Scenarios assessing potential impact of drivers on companies, products, technologies and industry structure to 2016 and beyond

### 2011 Manufacture Profiles

- Profile of each firm's crop protection business by product group

### Product listing by:

- 600+ product brands and their active ingredients
- Patent status and target market for each brand
- Product detail by seed traits

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### About Kline & Company

The 2011 crop protection market continued to experience strong commodity prices producing favorable farmer profits, enabling them to spend more for crop inputs.

### Introduction

The 2011 U.S. crop protection market experienced dramatic price decreases in addition to the high inventory levels at the distributor level causing unfamiliar market situations for all levels of the supply chain. This report captures these market situations and trends that include:

- Seed treatments and coatings
- Generic manufacturers and products
- Branding strategies
- Distribution structure
- Retailer sales strategies
- Biotech seed traits perspective

This study provides reliable 2011 company and product sales information which is the foundation for any assessment within the U.S. crop protection industry. Crop protection is increasingly defined by a complex set of technologies and marketing strategies that go beyond the traditional definition. This includes seeds and seed treatment products in addition to generic pricing strategy and distributor level activity which all must be taken into account for a complete and thorough market analysis of the U.S. crop protection industry.

### Study Objectives

The principal objective of this study is to provide marketing managers with a reliable assessment of the overall performance of the U.S. crop protection industry in 2011. In meeting this objective, clients will be provided with a management tool to improve their perspective of the 2011 market situation and how the current situation may unfold over the next five years.

### Market Overview

Today's market turbulence in the crop protection industry began fifteen years ago with the convergence of biotech crops, major product patent expirations, and acceptance of generic products at a time when the industry was maturing with saturated markets. Rather than follow traditional mature market curves, the U.S. crop protection industry is becoming more diverse and dynamic as each of these strategic drivers creates its own footprint within the industry. Traditional crop protection chemicals remain reliable indicators of overall industry direction, but newer crop protection components, i.e. generics, seed treatments or biologicals, must be factored into any analysis of current or future industry performance.

### Research Methodology and Timing

This report, *Crop Protection Manufacturers Report 2011* will rely on a range of research methodologies. This will include discussions with manufacture, distributor and retailer management, beginning in September 2011. This will take place at office locations, including association venues and trade conventions to February 2012. An intense review of relevant public documents of each company will also take place during this time. Final production will be published in April 2012.

### Target Audience

Agribusiness marketing professionals who require unique strategic insights based on sound market information to better understand the current situation while intercepting emerging trends and opportunities.

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### Tentative Report Contents

#### 1. INTRODUCTION AND OBJECTIVE

- Purpose and objectives
- Timing
- Approach to methodology

#### 2. EXECUTIVE SUMMARY

#### 3. SUMMARY OF 2011 U.S. CROP PROTECTION MARKET

- Highlights of major industry events in 2011
- 2011 One page highlights of each profiled company:
  - Net 2011 sales vs. 2010
  - Key events taking place in 2010:
    - Marketing actions
    - Strategic initiatives
    - New product launches
    - Significant registrations
    - Acquisitions and divestitures
    - Distribution channel changes
- Total net 2011 sales-top 15 U.S. companies
  - Chemicals: agricultural crop markets
  - Seed: treatments and coatings
  - Seed: products
- 2010 Industry sales by product groups
  - Herbicides
  - Insecticides
  - Fungicides
  - PGR's
  - Fumigants, other
  - Seed treatment
  - Seed traits

#### 4. STRATEGIC CHANGE DRIVERS

- Overview of principal change drivers: 2011-2016
  - Distribution channel restructuring
  - Branded vs. private label vs. generic products
  - New and emerging technologies
  - Growing number of-shore manufacturers
- Potential scenarios by company
  - Likely sales impacts from change drivers
  - Company sales outlooks: 2011-2016
  - Multiple scenario development of possible outcomes

#### 5. MANUFACTURE PROFILES

- Major research-based manufacturers
  - BASF
  - Bayer
  - Dow
  - DuPont
  - Monsanto
  - Syngenta
  - Valent
- General chemical manufacturers
  - Albaugh
  - Amvac
  - Arysta
  - Cheminova
  - FMC
  - MANA
  - Nufarm
  - UPI

#### 6. PROFILE DETAIL

*Each company profile will include:*

- 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
  - PGRs/other
  - Seed treatment
- Sales 2011 vs. 2010
- Brands by a.i., patent status, target markets
- Review of new marketing initiatives
- Company profitability by EBIT
- 2011 Business activity
  - Sales group structures
  - Distribution direction
  - Research & technology
  - Manufacturing
- Five-and ten-year business outlook

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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 the foundation of business intelligence is accurate, current, and reliable.

Kline will conduct interviews with leading distributors, retailers, industry experts, consultants, and other knowledgeable people in the process of putting together this report. Interviews will be conducted by Kline professionals. Primary research will represent the bulk of our research efforts, supported by secondary research drawn from the various available 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 energy 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](mailto:sales@klinegroup.com), visit our website at [www.KlineGroup.com](http://www.KlineGroup.com), or contact us at any of our regional offices listed below

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

- Professional Turf and Ornamental Markets for Pesticides and Fertilizers 2011
- Global Miticides 2011: Market Analysis and Opportunities
- Professional Mosquito Control Insecticides 2011: Market Analysis and Opportunities
- U.S. Fruit and Vegetable Pesticide Suppliers 2011: Customer Satisfaction and Loyalty Ratings
- Range & Pasture Insecticides 2011: U.S. Market Analysis and Opportunities
- Crop Protection Manufacturers Report 2011
- Leading Distributors in the U.S. Crop Protection Industry 2011
- Specialty Pesticides Russia 2011: Market Analysis and Opportunities
- Global Nematicides Market 2010 Global Series: Market Analysis and Opportunities
- The U.S. Industrial Vegetation Management Market for Pesticides and Fertilizers 2011
- Consumer Markets for Pesticide and Fertilizers 2011

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