

Crop Protection Manufacturers Report:

A Strategic Market Analysis of the Brazilian Crop Protection Industry

Published March 2014

Base Year: 2012

Kline & Company welcomes you to our first annual report covering the marketing year for manufacturers in the Brazilian crop protection industry.

Highlights of the report include:

Summary Company Highlights

- Lead section highlighting major decisions, actions and results in 2012
- 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 2017 and beyond

Manufacturer Profiles

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

Product listing by:

- 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 2012 crop protection market continued to experience strong commodity prices producing favorable farmer profits, enabling companies to spend more for crop inputs.

Introduction

The 2012/2013 Brazilian crop protection market began the year with a drought that is expected to negatively impact soybean and wheat production. This report examines the events taking place in 2012 and how the crop protection manufacturing sector performed during the 2012 year. This report captures these market situations and trends that include:

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

This study provides reliable 2012 company and product sales information which is the foundation for any assessment within the Brazilian 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 Brazilian 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 Brazilian crop protection industry for the 2012 season. In meeting this objective, clients are provided with a management tool to improve their perspective of the 2012 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 about 15 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, such as 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 for Brazil 2012/2013 will rely on a range of research methodologies. This includes discussions with manufacturer, distributor, and retailer management beginning in June 2013. An intense review of relevant public documents of each company also took place during this time.

Target Audience

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

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Report Contents

1. Introduction

- Purpose and objectives
- Timing
- Approach to methodology

2. Executive Summary

3. Summary of 2012/2013 U.S. Crop Protection Market

- One page highlights of each profiled company:
 - Net 2012 sales
 - Key events taking place in 2012/2013
- Marketing actions
- Strategic initiatives
- New product launches
- Significant registrations
- Acquisitions and divestitures
- Distribution channel changes
- Total net 2012 sales-top 15 Brazilian companies
 - Chemicals: agricultural crop markets
 - Seed: treatments and coatings
 - Seed: products
- 2012 Industry sales by product groups
 - Herbicides
 - Insecticides
 - Fungicides
 - Plant growth regulators
 - Fumigants, other
 - Seed treatment
 - Seed traits

4. Strategic Change Drivers

- Overview of principal change drivers: 2012-2017
 - 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: 2012-2017
 - Multiple scenario development of possible outcomes

5. Manufacture Profiles

- Major research-based manufacturers
 - BASF
 - Bayer
 - Dow
 - DuPont
 - Iharabras
 - Monsanto
 - Syngenta
- General chemical manufacturers
 - Nufarm
 - Arysta
 - Cheminova
 - FMC
 - Milenia

6. Profile Detail

Each company profile will include::

- Global business and sales
- Global crop protection sales
- Brazil crop protection business
- Brazil crop protection sales and product details by:
 - Herbicides
 - Insecticides
 - Fungicides
 - Plant growth regulators/other
 - Seed treatment
- Sales 2012
- Brands by active ingredients, patent status, target markets
- Review of new marketing initiatives
- 2012 business activity
 - Sales group structures
 - Distribution direction
 - Research and technology
 - Manufacturing
- Five-and 10-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 conducted interviews with leading distributors, suppliers, retailers, industry experts, consultants, and other knowledgeable people in the process of putting together this report. Interviews are conducted by Kline professionals.

Primary research represents 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, 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 Pesticides industry includes:

- The U.S. Industrial Vegetation Management Market for Pesticides and Fertilizers
- Consumer Markets for Pesticides and Fertilizers USA
- Seed Treatment Global Series: Market Analysis and Opportunities
- Global Nematicides Market: Market Analysis and Opportunities
- Global Mosquito Control Insecticides: Market Analysis and Opportunities
- Stored Grain Insect Control: U.S. Market Analysis and Opportunities
- Global Professional Pest Management Markets for Pesticides: Market Analysis and Opportunities

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