



20th Edition

# Global Industrial Vegetation Management of Pesticides and Fertilizers: Market Analysis and Opportunities

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Base Year: 2013

**Regional Coverage:** Asia-Pacific ■ Europe ■ Latin America ■ North America

A comprehensive analysis examining global industrial vegetation management, including the invasive weed market for pesticides and fertilizers, focusing on key trends, developments, changes, challenges, and business opportunities.

## This Report Will Address Such Issues as:

- The size and segmentation for each market segment for herbicides, fertilizers, and insecticides by brand, and weed treated
- Invasive weeds of importance including herbicide treatments
- Acre treatments by market segment and brand
- Active ingredient usage by market segment
- Supplier summary totals by brand
- Separate totals for pre and post emergence herbicides by market segment
- Interactive database

Additional features of the U.S. report:

- Invasive weed information included within each market study
  - Regional list including infested acres for key invasive weeds
  - Treatments used, volumes, acre treatments
  - Weed district survey in West and North Central regions
- Additional end user pastureland interviews within the range and pasture market study
- Customer satisfaction
  - Product likes and dislikes
  - New product needs



# Report Contents

## Introduction

Executive Summary (An overview of the report findings plus forecast based on Kline's FutureView Forecasting Model)

## United States

- Invasive Weed Control
- Forestry
- Rangeland and Pastureland
- Railroads
- Roadways
- Electric Utilities and Pipelines
- Aquatic Areas
- Insecticides
- Herbicides
- Plant Growth Regulators
- Suppliers

## Australia

## Brazil

## France

## Germany

## Japan

## Russia

## South Africa

## United Kingdom

Each market segment contains the following information (some markets, where appropriate, will also include information on insecticides, fertilizers, plant growth regulators, and algaecides):

- Introduction
- Structure of the Industry
- Invasive and noxious weeds (U.S. only)
- Overall market
- Incidence of weeds and brush
- Control methods
- Herbicides
  - Pre-emergence herbicides
  - Post-emergence herbicides
- Critical issues
- New product needs
- Outlook

All countries outside of the United States include breakdowns for herbicides and insecticides for the forestry, railroads, and other IVM markets, as needed.

The report includes an interactive database.



## Scope

Global Industrial Vegetation Management of Pesticides and Fertilizers: Global Market Analysis and Opportunities presents the results of a comprehensive survey of the United States industrial vegetation management (IVM) including rangeland and pastureland, forestry, aquatic areas, and the right of way segments, which include roadways, railroads, electric utilities, and pipelines. In addition, the U.S. report will include invasive weed details in the appropriate chapters with information about acres of key invasive weeds and the brands, volumes, and sales values of the products used to treat them. For countries outside the United States, forestry, railroads, and other IVM, depending on the country. It analyzes in detail the products, weeds/brush they treat, their applications, estimated sales in 2013 at the manufacturers’ level, suppliers’ market shares, and qualitative issues. The study analyzes the use of pesticides and fertilizers (herbicides, insecticides, plant growth regulators, and fertilizers) in the IVM market. The segments contained in each country varies.

U.S.	Other countries
Forestry	Forestry
Rangeland and pastureland	Railroads
Roadways	Other IVM
Railroads	
Electric utilities and pipelines	
Aquatic areas	

## Key Benefits

This report serves as an excellent resource for manufacturers and formulators of industrial vegetation management pesticides and fertilizers. Specifically, this report assists subscribers by providing:

- A highly reliable and independent assessment of the brand share sales for IVM pesticides and fertilizers by market segment
- Separate breakdown for invasive weeds for each market segment using both end user IVM data and weed control district data (U.S. only)
- Key product usage patterns for each specific market segment
- Active ingredient volumes, including generics
- Customer satisfaction
  - Product likes and dislikes
  - New product needs

Subscribers to this study have unlimited access to Kline’s proprietary FutureView Scenario Forecasting Model. This interactive model provides forecasts of the future size of the IVM pesticide and fertilizer market, broken down by segment and product type. Subscribers are available to run numerous “what if” scenarios by marking changes to supply and demand forecast assumptions.



### 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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