



5th Edition

# Global Nematicides: Market Analysis and Opportunities

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Base Year: 2016

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

This analysis provides crop protection suppliers with the latest information on the size, structure, and outlook for the nematode treatment market in the major country/crop markets of the world:

#### Countries included:

- Argentina
- Australia
- Brazil
- Canada
- China
- India
- Italy
- Japan
- South Africa
- Spain
- Turkey
- United Kingdom
- United States

#### Proposed crop segments/examples

- Fruits and nuts
- Row crops
- Specialty crops
- Vegetables
- Other crops



## Report Contents

Introduction

Executive Summary

FutureView Forecast and Outlook

### Technical Overview

- Key nematodes impacting crops
- Cultural and physical control methods
- Genetic control
- Chemical control
- Biological control
- New control methods

### North America

- Canada
- United States

### Europe/Africa

- Italy
- South Africa
- Spain
- United Kingdom

### South America

- Argentina
- Brazil

### Asia-Pacific

- Australia
- China
- India
- Japan
- Turkey

Each country section contains the following topics for the crops covered in that country:

- Crop background
- Planted acres
- Nematode problems and type
- Resistant variety status
- Non-chemical alternatives
  - Cultural practices
  - Biocontrols
- Sales and market share by brand/active ingredient
- Sales by supplier
- Potential for nematicides
- Outlook and assumptions for market forecast





## Scope

Global Nematicides: Market Analysis and Opportunities is a detailed analysis of this key segment of the agricultural market. A number of trends and changes in this market make this the right time for this overview:

- As commodity prices remain low, growers are looking for value in crop protection.
- As biotechnology advancements have increased the value of some field crop seed by introducing new traits, growers have demanded better protection of the seedling to maximize their return on investment.
- Details on new biological nematicides by country and crop.
- At the same time, new active ingredients have been introduced that present new opportunities for seed protection. This has resulted in the elimination of some soil insecticide applications that included nematicidal properties.
- New insect protection genetics in corn and cotton have changed the spectrum of pests to protect against, resulting in the need to rethink crop protection strategies.

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.

## Key Benefits

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

- Highly reliable and independent assessment of the competitive positions of the major suppliers of nematicides in terms of product sales and market share within each country
- Provide market sizes and outlook for 39 crop/country market segments, as shown in Table 1
- Insights into the reasons for treatment or the impact of non-treatment of key nematodes and the leading products in each segment
- A tabulation of unmet needs provided by our respondents for the key crops grown in each country
- For product developers, we provide a description of the cultural practices used by growers to control and/or prevent the buildup of crop damaging nematodes



**Table 1: Country Crop List**

Country	Vegetables-a	Specialty-b	Fruits and nuts-c	Field crops-d	All other-e
United States	X	X	X	X	X
Japan	X	X	X	X	X
Brazil	X	X	X	X	X
China	X	X	X	X	X
India	X	X	X	X	-
Spain	X	X	X	-	X
Italy	X	X	-	-	-
United Kingdom	X	X	-	-	X
Canada	X	X	X	X	X
South Africa	X	X	X	X	X
Argentina	X	X	X	X	X
Turkey	X	-	X	-	-
Australia	X	X	X	-	-

a- Includes tomatoes, peppers, onions, melons (all), squash, cucumbers, carrots, sugar beets, and sweet potatoes.

b- Includes coffee, peanuts/groundnuts, flowers, turf, sugar cane, sunflowers, tobacco, potatoes, and sorghum.

c- Includes grapes, citrus, strawberries, bananas, almonds, pome fruits, stone fruits, and other important fruits and nuts.

d- Includes wheat, corn, cotton, soybeans, and rice.

e- Includes sugar beets, tea, and canola.



## Methodology

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### 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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