

Industrial Vegetation Management Pesticides and Fertilizers 2010:

U.S. Market Analysis and Opportunities

18th Edition

Published August 2010

Base Year: 2009

A comprehensive analysis examining the U.S. industrial vegetation management, including the invasive weed market for pesticides and fertilizers, focusing on key trends, developments, changes, challenges, and business opportunities, and addressing such issues as:

- The size and segmentation for each market segment for herbicides, fertilizers, and insecticides by brand, region, and weed treated
- Invasive weeds of importance by state/region, 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

New for this edition:

- Invasive weed information included within each market study
 1. State/regional list including infested acres for key invasive weeds
 2. Treatments used, volumes, acre treatments
 3. Trends for invasive weed control
- An additional 500 end user pastureland interviews within the range and pasture market study
- Custom applicator survey to provide another perspective on application trends, combination product usage, and unmet needs
- Generic herbicide survey to provide in-depth look at their impact on the industrial vegetation management market within the United States

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Report Scope

Industrial Vegetation Management Pesticides and Fertilizers 2010: U.S. 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. It analyzes in detail the products, weeds/brush they treat, their applications, estimated sales in 2009 at the manufacturers' level, suppliers' market shares, and qualitative issues. In addition, invasive weed details are included in the appropriate chapters with information about acres of key invasive weeds per state and the brands, volumes, and sales values of the products used to treat them.

The study analyzes the use of four categories of pesticides and fertilizers (herbicides, insecticides, plant growth regulators [PGRs], and fertilizers) by seven segments of the IVM market. The segments contained in each category are listed below:

Segments	Categories
■ Forestry	■ Herbicides
■ Rangeland and pastureland	■ Insecticides
■ Roadways	■ PGRs
■ Railroads	■ Fertilizers
■ 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
- Key product usage patterns for each specific market segment
- Active ingredient volumes, including generics

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.

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Report Contents

1. INTRODUCTION

2. SUMMARY

An overview of the report findings plus forecasts based on Kline's FutureView Scenario Forecasting Model.

3. INVASIVE WEED CONTROL

4. FORESTRY

- Introduction
- Structure of the industry
- Invasive and noxious weeds
- Overall market
- Forestry practices
- Fertilizers
- Herbicides
- Pre-emergence herbicides
- Postemergence herbicides
- Insecticides
- Critical issues
- Outlook

5. RANGELAND AND PASTURELAND

- Introduction
- Structure of the industry
- Invasive and noxious weeds
- Major federal landowners
- Incidence of weeds and brush
- Control methods
- Herbicides
- Pre-emergence herbicides
- Postemergence herbicides
- Critical issues
- Outlook

6. RAILROADS

- Introduction
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- Herbicides
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- Postemergence herbicides
- Critical issues
- Outlook

7. ROADWAYS

- Introduction
- Structure of the industry
- Invasive and noxious weeds
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- Insecticides
- Plant growth regulators
- Aquatic herbicides
- Critical issues
- Outlook

8. ELECTRIC UTILITIES AND PIPELINES

- Introduction
- Structure of the electric utilities industry
- Structure of the pipelines industry
- Invasive and noxious weeds
- Overall market
- Herbicides
- Postemergence herbicides
- Pre-emergence herbicides
- Critical issues
- Outlook

9. AQUATIC AREAS

- Introduction
- Structure of the industry
- Invasive and noxious weeds
- Overall market
- Invasive/noxious weeds
- Aquatic herbicides
- Algaecides
- Critical issues
- Outlook

10. PRODUCT SUMMARIES

10A. Insecticides

10B. Herbicides

10C. Plant Growth Regulators

The following information is provided for each of the product categories:

- Function
- Product type
- Product form
- Overall market
- Outlook
- Assessment

11. SUPPLIERS

Sales by end-use segment and product category are provided for leading companies in the vegetation management market.

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Methodology

Kline is unmatched in our ability to gather hard-to-get market and competitive intelligence with a high degree of confidence. Kline's market analysis approach places the principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable.

During the course of field research, Kline's professional staff of industry experts had in-depth discussions with a wide range of knowledgeable industry participants and opinion leaders, including state extension IVM experts, herbicide product manufacturers and marketers, distributors and suppliers, Kline also has discussions with the U.S. Forest Service, Corps of Engineers, BLM and other federal agencies, and other influencers on brand and supplier purchase decisions. In addition, Kline conducted interviews with end-users in many of the market segments covered by this study.

Kline also conducted approximately 1,000 interviews with end-users in the range and pasture, roadways, and electric utilities and pipeline right-of-way markets. These interviews provide additional insights into brand usage and weeds treated for these key markets.

Invasive and noxious weed related information will be obtained through the course of all interviews conducted for this report and reported in each market segment.

This approach has proven to be the most effective and reliable approach to obtaining accurate market data, capturing expert insights, and identifying business opportunities. Primary research comprises over 95% of the overall research methodology for this report. In addition, this analysis is supplemented by secondary research drawn from the review of suppliers' product literature and price lists; a search of recent trade and technical literature; Internet sources; and analysis of statistical data from government, industry, and trade associations and agencies.

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.

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Recently published or in-progress research for the Agricultural/Specialty Pesticides Industry includes:

- The U.S. Industrial Vegetation Management Market for Pesticides and Fertilizers 2008
- The U.S. Market for Professional Mosquito Control Products 2008
- Miticides 2007: U.S. Market Analysis and Opportunities
- Nematicides 2007: U.S. Market Analysis and Opportunities
- The U.S. Market for Invasive Weed Control Products
- The U.S. Market for Fly Control Pesticides in Production Animal Health 2007
- Global Markets for Specialty Pesticides, 2006-2007
- Professional Turf and Ornamental Markets for Pesticides and Fertilizers USA 2007

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