

# Industrial Vegetation Management Pesticides and Fertilizers 2012:

## U.S. Market Analysis and Opportunities

**19th Edition**

**To be published 2nd Quarter 2012**

**Base Year: 2011**

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:

- Interactive database will allow subscribers to customise IVM data to fit their needs
- 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 400 end user pastureland interviews within the range and pasture market study
- Customer satisfaction
  - Product likes and dislikes
  - Brand switching and re-use intentions

NOTE: Also available Global Industrial Vegetation Management and Forestry. See last page of this brochure for pricing.

# Industrial Vegetation Management Pesticides and Fertilizers 2012: U.S. Market Analysis and Opportunities

## Report Scope

*Industrial Vegetation Management Pesticides and Fertilizers 2012: 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 2011 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 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
- Customer satisfaction
  - Product likes and dislikes
  - Brand switching and re-use intentions

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.

- Interactive database will allow subscribers to customize IVM data to fit their needs

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## Tentative 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
- Customer satisfaction
- 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
- Insecticides
- Customer satisfaction
- Critical issues
- Outlook

### 6. RAILROADS

- Introduction
- Structure of the industry
- Invasive and noxious weeds
- Herbicides
- Pre-emergence herbicides
- Postemergence herbicides
- Customer satisfaction
- Critical issues
- Outlook

### 7. ROADWAYS

- Introduction
- Structure of the industry
- Invasive and noxious weeds
- Overall market
- Fertilizers
- Invasive/noxious weeds
- Herbicides
- Pre-emergence herbicides
- Postemergence herbicides
- Insecticides
- Plant growth regulators
- Aquatic herbicides
- Customer satisfaction
- 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
- Customer satisfaction
- Critical issues
- Outlook

### 9. AQUATIC AREAS

- Introduction
- Structure of the industry
- Invasive and noxious weeds
- Overall market
- 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.*

# Industrial Vegetation Management Pesticides and Fertilizers 2012: U.S. Market Analysis and Opportunities

## 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 will conduct 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 will conduct interviews with end-users in many of the market segments covered by this study.

Kline will conduct approximately 800 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.

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.

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

- 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 2010
- Consumer Markets for Pesticide and Fertilizers 2010