



5th Edition

Pest Control in Production Animal Health: Global Market Analysis and Opportunities

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

A comprehensive analysis of the global market for pesticides focusing on animal health, including poultry, pork, beef, egg, and dairy production. The focus of this report is on looking at key trends, developments, changes, challenges, and business opportunities.

This Report Addresses Such Issues as:

- Sales and volumes of pesticides consumed by brand, active ingredient, and supplier
- Non-chemical control practices
- Sales volume projections by animal
- Regulatory issues
- Resistance
- New products/technology



Report Contents

Introduction

Executive Summary/FutureView Forecast

Countries include Argentina, Australia, Brazil, China, France, Germany, India, Japan, Mexico, New Zealand, the United Kingdom, and the United States. For each country covered, the study provides the following information:

Market Structure

Animal segments include:

- Poultry and egg production
 - Broiler
 - Turkey
 - Egg-layer
- Dairy production
- Beef production
- Hog production (if appropriate)
- Sheep (if appropriate)

Key pests covered (where appropriate):

- Poultry (flies, darkling beetle, northern fowl mite and other mites, fleas, lice, other)
- Dairy (stable, horn, face, and other flies; lice; mites; ticks; grubs; other)
- Beef (stable, horn, face, and other flies; lice; mites; ticks; grubs; other)
- Hogs (flies, sarcoptic mange, lice, ticks, other)
- Sheep (flies, blow fly/fly strike, sheep keds, mites, ticks, other)
- All livestock segments (mice and rats, where appropriate)

Each livestock segment covers the following topics:

- Market background
- Animal demographics
- Producer practices
- Animal concentrations and turnover
- Litter/manure control
- Regulatory issues
- Non-chemical control methods
- Control products by animal type
- Sales by animal and insect treated
- Sales by brand and/or active ingredient
- Sales by supplier
- Active ingredient consumed
- Product rates and prices
- Resistance management
- Other important market issues or opportunities
- Outlook
- New products/technology





Scope

This global report provides an accurate and independent appraisal of the market size and segmentation of this important market. The study details pesticide use by animal and product form in the targeted countries. Pest control is a major issue in animal-based agriculture due to the impact of these pests on productivity. Insects annoy and irritate animals, transmit disease, reduce weight gains, and reduce production. Producers have gone to extraordinary lengths in sanitation, manure and litter removal, facility design, and air handling to eliminate potential entry points and breeding areas for flies and other insects. Still, situations remain that are most effectively handled by an insecticide application. The report focuses on these key production animals in each country:

- Beef
- Dairy
- Sheep
- Poultry
- Hogs

Key Benefits

This report serves as an excellent resource for manufacturers of marketers of pesticides used in the production animal health market. Specifically, this report assists subscribers by providing:

- A highly reliable and independent assessment of brand shares for pesticides used by professionals in production animal health
- Details on the chemical versus non-chemical methods used to control insects
- Sales values by insect species treated
- Breakdown of sales by leading animals and pests treated in each country
- Key usage patterns for controlling insects
- Latest trends in the production animal health pest control market

Subscribers to this study have unlimited access to Kline's proprietary FutureView Scenario Forecast. This provides a forecast of the future size of the professional fly control pesticide markets, broken down by brand, active ingredient, and supplier.



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. The basis of the data for the U.S. part of this study is from 450 structured interviews with producers and a series of unstructured interviews with industry experts. Members of Kline’s Specialty Pesticides practice will develop the questionnaires, conduct the unstructured interviews, and compile and prepare the final report deliverable. The data gathered for the countries surveyed outside of the United States uses expert interviews from Kline’s professional staff. Interviews were conducted with experts in the poultry, dairy, beef, and swine markets as well as distributors, suppliers, and other experts to provide a complete picture of the animal health insect control markets in each country. Secondary resources are used to supplement the research findings.

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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North America
+1-973-435-3407

Latin America
+55-11-3079-0792

Europe
+32-2-770-4740

China
+86-21-6012-6500

India
+91-124-4546-100

Japan
+81-3-3242-6277