

# Seed Treatment 2012 Global Series:

## Market Analysis and Opportunities

**To be Published 1st and 2nd Quarters 2012**

**Base year: 2011**

### **Regional Coverage**

**North America:**  
To be published 2nd Quarter  
2012

**Europe and Africa:**  
To be published 2nd Quarter  
2012

**South America**  
To be published 1st Quarter  
2012

**Asia-Pacific**  
To be published 1st Quarter  
2012

A comprehensive analysis designed to provide crop protection suppliers with the latest information on the size, structure, and outlook for the seed treatment pesticide market in major country/crop markets across the globe.

# Seed Treatment 2012 Global Series: Market Analysis and Opportunities

## Report Scope

*Seed Treatment 2012 Global Series: Market Analysis and Opportunities* is a detailed analysis of and outlook for one of the most dynamic sectors in all of crop protection.

A number of converging trends make this the right time for this overview:

- As commodity prices remain high for growers around the world, it makes even more sense for growers to invest in protecting their crops.
- As biotechnology advancements have increased the value of some field crop seed by introducing new traits, growers have demanded better protection of that seed to maximize their return on investment.
- At the same time, new active ingredients have been introduced that present new opportunities for seed protection.
- New insect-resistant genetic traits in corn and cotton have changed the spectrum of pests to protect against, resulting in niche markets for seed companies that treat seeds for insect protection.

This report will focus on the application of fungicides and insecticides but will include other treatments that may be applied as a way of protecting the seed and seedlings, as well as enhancements such as colorants. It will review the most common seedling diseases for the crops being studied, address cultural practices and non-chemical control methods, and then focus on the technologies and products used to treat seed prior to planting.

Most of the report will focus on off-farm treatment, but in cases where on-farm treatment is important, these treatments will be covered as well.

Crops covered in the report are:

- Corn/maize
- Cotton
- Potatoes
- Rice
- Soybeans
- Sugar beets
- Wheat
- Sunflowers
- Canola/oilseed rape

## Key Benefits

The report will serve as an excellent reference for developing and executing marketing plans. It will provide:

- Estimates of market sizes and outlook for key seed treatment crops in 19 countries
- A highly reliable and independent assessment of the competitive positions of the major seed treatment suppliers in terms of product sales and market share
- Management-level insights into the reasons for treatment, the key insects and diseases being treated, and the leading products in each segment
- For marketers interested in increasing their penetration into seed treatment, we will provide an assessment of strengths and weaknesses for current products and a tabulation of unmet needs provided by our respondents
- For product developers, we will provide an overview of the cultural practices used by growers to produce their crops, the role of seed treatment, and opportunities to establish or increase market penetration

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## Contents

### 1. INTRODUCTION

### 2. EXECUTIVE SUMMARY

*Includes forecasts generated with Kline's FutureView Scenario Forecasting Model.*

### 3. TECHNICAL OVERVIEW

- Description of diseases, insects, nematodes, and other reasons seeds are treated; control options; current active ingredients and select products under development
- Product formulations, rates, and application issues and opportunities
- Combination products
- Seed treatment methods
- Interface between seed treatment and biotechnology

### APPLICATIONS AND MARKET SEGMENTATION

### 4. NORTH AMERICA

- 4A. Canada
- 4B. Mexico
- 4C. United States

### 5. EUROPE AND AFRICA

- 5A. France
- 5B. Germany
- 5C. Italy
- 5D. Hungary
- 5E. Poland
- 5F. Russia
- 5G. South Africa
- 5H. Ukraine
- 5I. United Kingdom

### 6. SOUTH AMERICA

- 6A. Argentina
- 6B. Brazil

### 7. ASIA-PACIFIC

- 7A. Australia
- 7B. China
- 7C. India
- 7D. Japan
- 7E. Thailand

*Each country section will contain the following topics for the crops listed in Table 1:*

- Crop background
- Planted acres
- Crop end use by acres or volume; regional differences within countries where appropriate
- Production and crop protection methods
- Key seed suppliers and their product compatibility with treatment

- Role of seed treatment as crop protection method
- Key diseases, insects, nematodes, and other reasons seeds are treated; regional differences within countries when appropriate
- Non-chemical alternatives
  - Sanitation
  - Biocontrols
  - Biotechnology
- Chemical treatment methods for target diseases and insects
  - Foliar
  - Soil at planting
  - Seed treatment
- Product sales and market share for seed treatment products
- Active ingredient use for seed treatment products
- Sales by company for seed treatment products
- Seed treatment outlook and assumptions by crop

Table 1: Country/Crop Coverage

Region/country	Corn/ maize	Soy- beans	Wheat	Potatoes	Sugar beets	Rice	Cotton	Canola/ oilseed rape	Sun- flowers
<b>ASIA-PACIFIC</b>									
Australia			X				X	X	
China	X	X	X			X		X	X
India	X	X	X			X		X	X
Japan						X			
Thailand						X			
<b>EUROPE AND AFRICA</b>									
France	X		X	X	X			X	X
Germany	X		X	X				X	
Italy	X			X					
Hungary	X		X						X
Poland			X	X					
Russia			X					X	X
South Africa	X		X	X			X		
Ukraine			X					X	X
United Kingdom			X	X	X			X	
<b>NORTH AMERICA</b>									
Canada			X					X	
Mexico	X		X						
United States	X	X	X	X		X	X	X	X
<b>SOUTH AMERICA</b>									
Argentina	X	X	X						X
Brazil	X	X				X	X		

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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 will conduct in-depth discussions and personal interviews with a wide range of knowledgeable industry participants and opinion leaders, including dealers, consultants, crop advisors, seed companies, and growers, to develop a detailed understanding of each seed treatment crop/country 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 represents the bulk of our research efforts, supplemented by secondary research drawn from the review of suppliers' product literature and price lists, a search of recent trade and technical literature, and Internet sources.

## 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 personal care 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 Agriculture/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