The AgriService

The primary focus of the AgriService is to provide subscribers with a comprehensive research source for information and analysis on the companies that are active in the crop protection and agricultural biotechnology industries. Profiles of the leading country, product and crop markets provide a comprehensive review of the business environment in which these companies are active and also provide a complete global market analysis. Market forecasts present both a quantitative and qualitative view as to how this environment is expected to change.

Information and data within the AgriService is designed to provide a full analysis of the Agrochemical Industry including the impact of the agricultural biotechnology sector on the conventional crop protection market. For ease of understanding and in order to present as complete a picture as possible all market and product analysis is calculated at the distributor level using average year exchange rates. This method of analysis is designed to minimize the effects of currency translation on the trend analyses presented. The market analysis presented in the AgriService represents a 10 year view of the crop protection industry, providing detailed data and discussion of the previous five years performance along with a forecast for market expectations in the next five year period.

The Phillips McDougall AgriService comprises four distinct parts; The AgriService Reference Volume; the AgriFutura, a monthly research note; the Product Directory and a support service:

The AgriService is completely updated each year to maintain an up-to-date comprehensive review of company and market performance. The information within the reference volume of the AgriService is enhanced by the Product Directory and the monthly review document, AgriFutura. The AgriService also provides clients with a full support service to assist with any data requests, AgriSupport.
The AgriService Reference Volume

AgriReference is the main quantitative part of the AgriService and it consists of a detailed analysis of the global crop protection market. The current situation of the worldwide market is presented and then analysed by sector as follows:

**Industry Overview**
- Global Analysis
- Market Forecasts
- Industry Structure
- M&A Events
- Regional Overview

**Crop Analysis**
- Crop/Pest matrices
- Chemistry / Biotechnology
- Planted Areas
- Market Evolution
- Political factors

**Product Analysis**
- Chemistry by Mode of Action
- Biotechnology
- Usage Trends
- Technical Data
- Commercial Data

**Research Section**
- R&D Products
- Chemistry
- Crops
- Research trends
- Company
- Crop

**Company Analysis**
- Organisation
- Sales and Profit
- Product Portfolio
- Market Focus
- Infrastructure
- R&D

**Regional Analysis**
- Regional markets
- Country Markets
- Key Crops
- Trend Analysis
- Leading Companies

The **Industry Overview** comprises a detailed summary of the crop protection market in the previous year as well as an analysis and discussion of the key factors that are expected to impact on the overall performance of the industry over the short to medium term. This section provides a forecast of future market expectations based on current market conditions, regulatory and legislative issues, and economic and trade factors. This section is updated during March.

In the **Crop Analysis** section the global crop protection market is analysed by the key crop sectors and subsequently into the individual herbicide, fungicide, insecticide and transgenic crop components. Profiles of each crop sector include information on the leading products and country markets, planted areas and their evolution, market trends and pest/product matrices. This section is updated in May/June.

**Product Analysis** focuses on both the conventional chemical component of the market as well as the impact of transgenic crops. The conventional crop protection market is divided by chemical category and by mode of action / resistance development classifications. Individual profiles present data on the sales, usage and expected performance of the leading products in each category, as well information on products in development. The market sectors for manipulated seeds expressing traits conferring crop protection are also profiled on a crop by crop basis. This section is updated in June.

Information on commercial products in the Product section is supplemented by the **Research Section**. This part of the AgriService includes details of products that are currently in the latter stages of research and development and are likely to be introduced within the next five year period. Products are classified according to their chemical class as well as their expected useage by crop and pest.

The **Company Analysis** section contains profiles of the main companies operating in the crop protection and biotechnology industry. Each company profile includes information on organisation, sales and profit analysis, the product portfolio including developmental projects, market and country focus and research and development. The strategy of each company is examined and an overall forecast of future performance based on aspects such as product status, R&D prospects and industry trends is presented. This section is updated in May (leading 15 companies) and August (other companies).

The **Regional Analysis** section presents a full breakdown of the global market by region and product category. In addition profiles of the twenty leading country markets are included detailing factors such as crop sector and product performance, historical and current sales; economic, trade, regulatory and legislative issues; crop planting and production trends and company representation. This section is updated in November.
Product Directory

Introduced in 2000 the AgriService Product Directory is an integral part of the Phillips McDougall AgriService. The aim of this directory is not only to increase the scope of the information presented in the AgriService Products Section but also to provide a link to crop and company data in an easy to use format. The product directory is an electronic compendium of all the commercially important agrochemical products, together with those compounds currently in the R&D pipeline. The directory is produced in electronic format and is supplied on a CD Rom enabling the user to transfer the file to either a stand alone computer or an internal company system. The Product Directory provides both technical and commercial information on a global basis. The directory consists of three main parts; firstly a compendium that includes all the main commercial agrochemical products in alphabetical order, secondly a R&D section which contains details of the products that are currently in the latter stages of the R&D pipeline and are likely to reach the market within the next five years and thirdly a crop section which covers the main commercial outlets for these products.

Product data including sales and usage information is presented in a uniform format and each commercial product entry contains information on the total sales of the product as well as listing the launch date, chemical class, main manufacturers and brand names. Usage data includes all of the main crop outlets for the product as well as the appropriate weed, pest and disease coverage.

Product Directory: Product Data Screen

<table>
<thead>
<tr>
<th>2,4-D</th>
<th>Product Type: Herbicide</th>
<th>Class: Phenoxyacetic acid</th>
<th>Sales ($m.): 265</th>
<th>Launch Date: 1945</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Manufacturer (and Brand): Nufarm (2,4-D)</td>
<td>Other Manufacturers: BASF, United Phosphorus, Dow, A H Marks, Makhteshim-Agan, Nitrokemia, Agro-San, Ancom</td>
<td>Application Timing: Post emergence</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Crop Uses: Cereals, Maize, Potatoes, Peanuts, Fruit, Non-crop use, Sugarcane, Rice</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pests controlled (and Rate g/ha): Broadleaved weeds (200-2000)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recent History: Commodity herbicide, but still an important product in low-cost broadleaf weed control strategies in a wide range of crops. Currently in a phase of sales decline. Nufarm now hold a major market share following their phenoxy acquisition strategy.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The crop section of the directory has been designed to provide a link between products, crops and the important pests, weeds and diseases that they control. The crop markets that are included represent the most important commercial outlets for agrochemical use. Interactive links provide easy navigation from the main crop usage page directly to crop summary information or to summary sheets listing the main products used to control the various pests. Each entry in the summary sheets is linked directly to the data screen for that product. Information on recent market entrants and potential competitors in R&D is also included.

Product Directory: Screen Examples
The monthly research note, AgriFutura is designed to provide in-depth analysis of a particular industry event or topic. One of the main aims of AgriFutura is to act as an independent source of analysis and opinion on current industry issues. The AgriFutura is published monthly in hard crop format, however it can also be provided by E-mail in PDF format.

AgriFutura

Data support is an integral component of the Phillips McDougall AgriService and as such is included in the subscription fee. Analysts are available to subscribers to provide further data support or advice by telephone, fax or E-mail. We encourage our clients to contact us whenever they have a need for further information on any crop protection or agricultural biotechnology subject.

AgriService Format

The AgriService can be supplied as a hard copy version or in electronic format for computer use. The computer version can also be operated over company intranet systems allowing multiple user access. The electronic version is designed to be interactive enabling the user to find the desired information relatively simply.

Opening Screen of Electronic Version:

Through the opening screen, users of the electronic version of the AgriService can gain access directly to the key parts of the product.

Confidential Consultancy Studies

For those clients who require specially commissioned studies on particular projects, Phillips McDougall offers a confidential consultancy service. These studies are generally carried out on a single-client basis but can be undertaken on a multi-client basis if required. Amongst the various topics that can be addressed include:

- Competitor intelligence reports
- Company acquisition screens
- Intermediate chemical supply
- Crop / product studies
- R&D in conventional chemistry
- Strategic company assessment
- Product supply and pricing
- Country market studies
- Industry forecasting
- R&D in agri-biotechnology

For each project we prepare an individually tailored protocol and costing for client review. Study reports can be made available in either hard copy or electronic format. If required Phillips McDougall can present the results of the investigation at the clients offices.

For more information about the AgriService or to discuss any aspect of the industry please contact John McDougall or Matthew Phillips

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