

Introduction to the 2021 Dunham Trimmer Global Pheromones Report

The 2021 Dunham Trimmer Global Pheromones Report quantifies the market for semiochemical-based products used in insect pest management. Pheromones and other semiochemicals can be used diagnostically for population monitoring or in control products that directly reduce insect populations.

This Report focuses on semiochemical-based insect control products (Mating Disruption, Mass Trapping and Lure and Kill). Monitoring product values are not included in its market projections, however, a description of Monitoring products and an estimate of global and regional Monitoring values is included in the Product Types Section.

The pheromones market has taken nearly 50 years to get to its current level of development, with most of the growth having materialized over the last 20 years. The main market drivers that have influenced this growth are related to Resistance and Residue Management, together with a more favorable legislative environment and consumer demands that have encouraged and facilitated the growth in use of pheromone-based products. The trend toward more sustainable agricultural production has resulted in government policies encouraging more sustainable use of plant protection products and less demanding regulatory requirements when compared with conventional plant protection products.

Included in the report is an examination of the merits of different types of pheromone delivery systems and a detailed look at the mechanisms and formulation types by which Mating Disruption is achieved.

Twenty-four key target pest species are described in the Report, including relevant pest development information, hectares treated, and the volume amount of active ingredient used annually on those hectares. Vine pests account for the largest share of the current Mating Disruption market, but disruptive changes in pheromone manufacturing are reducing COGS significantly and will opening future markets such as broad-acre crops.

Market data and forecasts are provided for five Global Regions, 24 Key Countries, and 10 Crop Groups.

Profiles of the leading 15 Global Pheromones Companies are provided as well as a matrix with all 64 Companies assessing and comparing AI Manufacturing Capacity, Sales Volume, and Technical Capability of each. The Report also includes SWOT Analysis, STEP (a.k.a. PEST, PESTLE) Analysis, and a Porter's 5 Forces Analysis.

A complete outline of the Report can be found below:

Executive Summary

Report Introduction

Semiochemicals Introduction and Definitions
History and Development

Report Methodology

Global Regional Segmentation

- Key Countries by Region
- Product Type Segmentation
- Crop Group Segmentation

Trends and Drivers

Macro Trends and Growth of Biologicals Segment

Key Drivers

- Sustainability and Consumer Demand
- Aggressive Policy Changes
- Disruptive Technology Impacting COGS

Regulatory Overview

The Approach in the US

The Approach in Europe

The Approach in China and other Key Countries

Product Types

Monitoring

Mass Trapping/Lure and Kill

Mating Disruption

Delivery Systems

Systems used in Monitoring, Mass Trapping and Lure and Kill

Formulations for Mating Disruption

- Reservoir Systems
- Controlled Release Systems
- Solid Matrix Systems
- Microencapsulated Sprayable Formulations
- Atomized Pheromones Dispensers
- Low Dose Female Equivalent Dispensers

Key Pests by Crop Group

European Grape Berry Moth

European Grapevine Moth

Vine Mealybug

Codling Moth

Oriental Fruit Moth

False Codling Moth

Peach Twig Borer

Diamondback Moth

Tuta Absoluta

Navel Orange Worm

Macadamia Nut Borer

Stored Product Moths

Fall Armyworm

Pink Bollworm

Rice Stem Borers

Fruit Fly

Palm Weevil

Bark Beetle

Gypsy Moth

Pine Processionary Moth

Housefly

Leaf Roller

Tea Tortrix

Honeydew Moth

- Identification
- Overview and Trends
- Global Hectares Treated
- Global AI Volume

Market Overview: Regions

Global Market

US/Canada

Latin America

Europe

Asia/Pacific

Rest of World

- Regional Market End-Use Values 2015-2025
- Regional CAGR 2015-2025
- Regional Market Shares 2015-2025
- Regional Hectares Treated 2015-2025

Crop Groups

Vine Crops

Pome Fruit

Stone Fruit

Vegetables

Nuts

Row Crops

Tree Fruit

Plantation Crops

Forestry

Other

- Regional Market End-Use Values 2015-2025
- Regional CAGR 2015-2025
- Regional Market Shares 2015-2025
- Hectares Treated by Pest 2015-2025

Key Countries

US

Canada

Brazil

Mexico

Chile

Argentina

Rest of LATAM

Spain

Italy

France

Greece

Germany/Switzerland/Austria

- Market End-Use Values 2015-2025
- CAGR 2015-2025
- Hectares Treated 2015-2025
- Market Shares 2015-2025
- Crop Group Market End-Use Values

Rest of Western Europe

Eastern Europe

China

India

Australia/New Zealand

Japan

South Korea

Southeast Asia

Rest of Asia/Pacific

South Africa

Other Rest of World

Key Companies

Global Leader Profiles

ATGC Biotech	Russell IPM
BASF	Scentry
Bedoukian	SEDQ
BioPhero	Semios
Chem Tica	Shin Etsu
ISCA	Suterra
M2i	Trécé
Provivi	

Global Pheromones Companies (64) Comparison Matrix

AI Production / Supply

- Production Capacity
- Sales Volume

Traps & Lures

Mass Trapping

Lure & Kill

Mating Disruption

- Tech Capability
- Sales Volume

SWOT Analysis

SWOT Analysis

STEP Analysis

Porter's 5 Forces Analysis

Acknowledgements and Disclaimer