

Imminent patent expirations to impact \$1.6 billion pesticide market in Europe

About 115 British pesticide patents will expire during this year and the next, "and the expirations will open up new manufacturing possibilities," finds a study on the European market for insecticides, fungicides, herbicides, and other pesticides by market research specialists Frost & Sullivan, Inc. in New York City. Such patents include one held by BASF on a urea derivative herbicide, by Monsanto on a Quinazolines fungicide, by Bayer on a carbamic ester insecticide, by Geitelich Sohne on a thiourea derivative biocide, and by Lyonnaise Ind Pharmaceutics on an Indandione derivative rodenticide.

This is but one finding in an unprecedented probe into the European pesticide market that, in 1975,

amounted to \$1.6 billion. Herbicides account for half of that figure, fungicides for about a quarter, and insecticides and miscellaneous pesticides for something less than 25 percent. By country, the largest national market is France at \$602 million a year, followed by West Germany at \$296 million, Italy at \$179 million, United Kingdom at \$165 million, and Spain at \$117 million.

Altogether the European Economic Community, that makes up the geographical market scope covered by the 212-page study, compares to the United States in agricultural self-sufficiency, especially in meats, dairy products, sugar, and cereals (except for maize). In addition, the EEC accounts for nearly

half the world's wine production. "Europe makes up a very large pesticide market," says the study, which also includes a chapter on the Russian market.

To meet that market need, some 1,000 companies turn out at least ten times that many pesticide formulations. By end-user category, forestry pesticides, in particular, offer "a scope for considerable expansion," while animal husbandry pesticides may decline in relative importance over the long term, the study says.

As for pest control, the industrial market is worth approximately \$50 million annually, with termite protection and other wood preservation measures accounting for half of the expenditures. An additional

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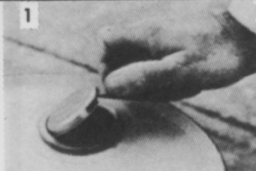
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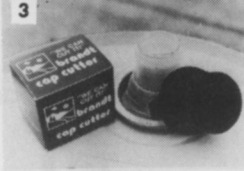


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\$100 million market for pesticides in home and garden applications is growing at a 4 percent to 5 percent annual clip. This market is characterized by high-priced, high-margin products.

Government regulations present the biggest uncertainty to pesticide producers. "Regulatory schemes among the various countries are fundamentally similar, but maddeningly different in detail," the study says. A typical control requires a pesticide producer to show evidence that a new product is toxicologically and environmentally safe. Some countries also require a producer to prove the efficacy of a product. But virtually all countries either restrict or forbid the use of organo-chlorine insecticides and

arsenites, and they limit organic mercurial applications to seed dressings.

The hodgepodge of government controls has hurt new product development. Of the \$20 million that it costs to come up with a new pesticide, a manufacturer tends to spend about \$10 million on data gathering just to win government approval.

The EEC will eventually come to regulate pesticide use, so that a universal control scheme can prevail throughout Europe, the study forecasts. Such a scheme is likely to combine the wide scope of British regulations along with the provision in French, Belgium, and Norwegian schemes that require pesticides to be re-approved periodically.

"The resulting control could be superior to any one of the separate national schemes," the study observes.

Despite the government obstacles, some product innovation does go on. Synthetic pyrethrin-type insecticides will become commercially important within a few years, the study project. Another R&D trend is to develop herbicides that apply to a single crop. Also, more and more companies are turning out synergistic mixtures of traditional pesticide formulations. Looking further down the road, compounds that translocate downwards in a plant to do a job against soil-borne disease and pests will become "of great importance" in pesticide development. □

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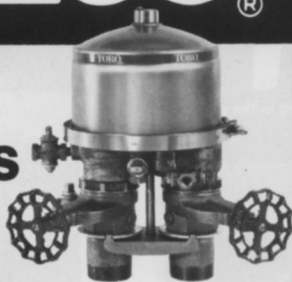
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