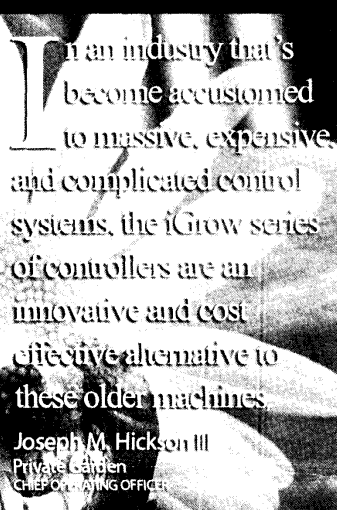


STATE OF THE INDUSTRY

All Eyes On PGRs

With increased competition, new formulations and generic products coming on the market, suppliers of plant growth regulators (PGRs) address changes and challenges in the industry.

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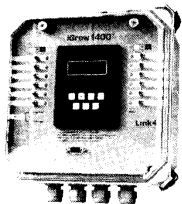
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For Details Circle No. 5 on Postcard

by LAURA DROTLEFF, Senior Staff Writer
ldrotleff@meistermedia.com

As in every other segment of the industry, competition is on the rise in the plant growth regulator (PGR) market, especially with the emerging generic molecules coming on the market as primary tools go off patent. But more competition is good news for growers, with more options available to source active ingredients, as well as improved formulations, broadened

application technology and increased technical support from companies vying for business. New patented chemistries also continue to be developed to meet market needs.

To assess the situation, we asked several reputable PGR suppliers for their take on the current status of PGRs as we know them, as well as what to expect in the future.

What's going on in the PGR market with a few players?

PGR Powerhouses

Chemtura Corporation

Years developing PGRs: 45

Products: B-Nine and Paczol

Representatives: Steve Jedrzejek, commercial manager, U.S. Specialty Products and Kevin Donovan, technical manager, U.S. Specialty Products

OHP Inc.

Years developing PGRs: More than 10

Products: Cycocel

New products: One in development, marketed as Tiberon

Representative: Dan Stahl, marketing and business development

Valent USA Corporation

Years developing PGRs: More than 25

Products: Sumagic, ProGibb T&O, Fascination

New products: One in development
Representatives: Jason Fausey, field market development manager and David Frye, marketing/alliance manager

Other PGR suppliers, Syngenta and SePRO, were unavailable for the article interview.

Chemtura: Reasonable alternatives are typically good for the industry in general. However, too many of the same PGRs fighting for the same market can dilute product value, sales revenue and, thereby, the resources needed for research to improve and support current products and to develop new and improved products for the future.

Valent: It's a very competitive marketplace and Valent sees off-patent products increasing in all segments of the industry — not just PGRs but herbicides, fungicides, etc.

OHP: We certainly understand that growers need to look at anything that is going to improve their bottom line. But the ultimate cost of use oftentimes goes a lot deeper than that. It depends upon the overall service package the company offers. It depends upon what additional innovations or developments a company can bring, along with an active ingredient itself.

What's going on in the PGR market with a few players?

Chemtura: We believe we have the best PGR technical expertise and

STATE OF THE INDUSTRY

trial database in the industry through many years of PGR development and support, provided to distributors and growers through our PGRx support platform, sales and TSS associates, and Chemtura's investment in the academic community. This adds significant value to both Paczol and B-Nine.

Valent: Valent continues to focus on what we can do to provide value to our customer through such avenues as our professional sales representative, technical support from our field market development managers, educational programs, unique packaging and university research. The drive is to differentiate our products and our company by offering superior products and services.

OHP: PGRs are probably one of the most complex areas because often there's as much applied knowledge as there is hard and fast rules for using PGRs. And obviously there's been a significant amount of novel application methods of

PGRs over the last couple of years. That's driving innovation to use applications for all the PGRs along with it.

Chemtura: Assuming at least equal product purity, quality and other formulation characteristics, post-patent products should not affect crops or production cycles any differently than the original patented product. However, considering the power of PGRs and the cost of mistakes, growers need to be very careful and discerning in the products they use in their greenhouse and nursery operations.

Valent: Off-patent PGRs will have little to no influence on producing a crop. In most cases, the active ingredient is labeled and used by growers on the crop.

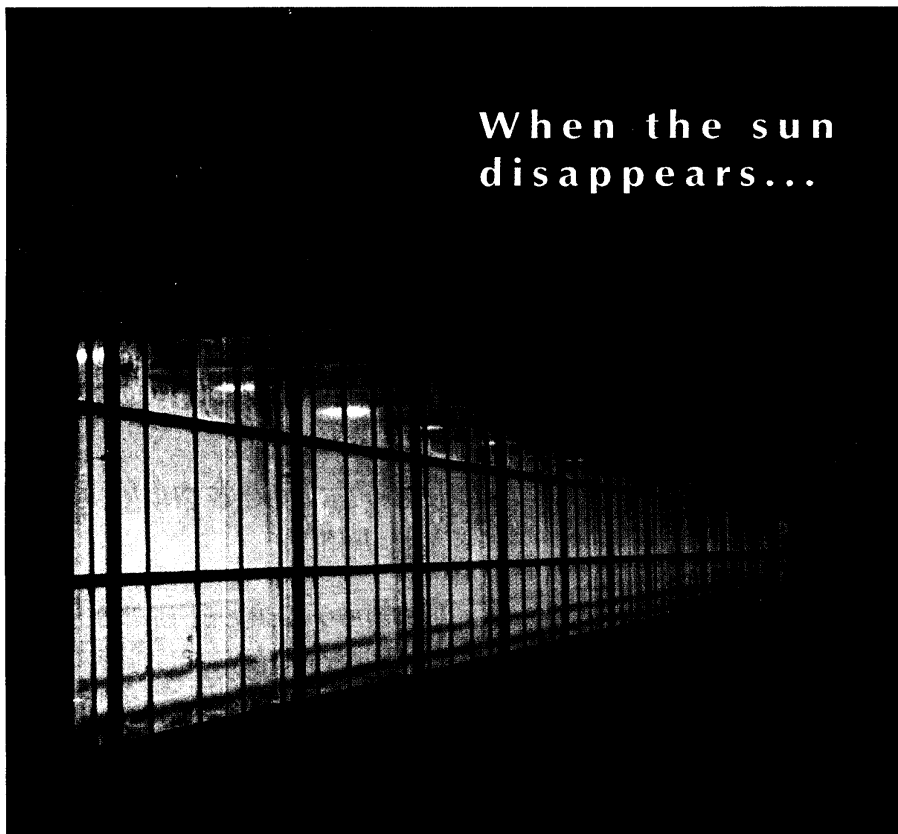
Chemtura: This can be looked at in two ways: 1) strongest in terms of versatility, in which case we would make a case for B-Nine, as it is an industry standard, easy to use (one rate range for

all crops), phyto safe, a common denominator for tank mixing; 2) in terms of strongest activity, that would have to go to Sumagic — it has the lowest use rates and is active on all ornamental plants.

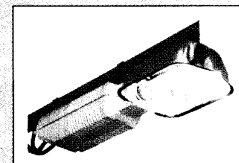
Valent: Valent's Sumagic and Fascination are two exceptional PGRs. Sumagic produces a denser, more compact growth and darker green foliage, plus increased shelf life for plants. It can be used on a variety of crops from bedding plants to woody ornamentals to poinsettias. Fascination also significantly improves the shelf life and marketability of ornamental crops because it prevents leaves from yellowing and increases flower size and number.

OHP: It's an issue of the entire value package that a product is providing, not just the active ingredients but the companies behind them. If we look at that, the leading PGRs in the marketplace today are the Bonzi brand, the B-Nine brand and the Cycocel brand. Those brands all contain leading active ingredients but they're also supported by companies that service the products, optimize their use and continue developing new patterns for them.

Continued on page 38



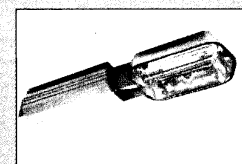
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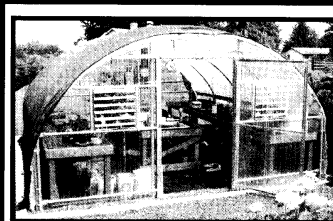


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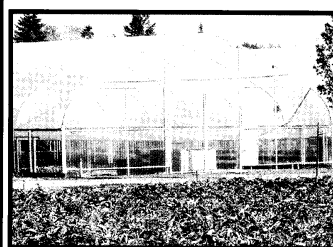
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STATE OF THE INDUSTRY

Continued from page 36

Valent: Most growers will continue to use products that bring them value. And they will continue to use product that they are familiar with or have some comfort level with. PGRs are not something you just change from one day to another or from one crop to another. Most growers have learned how to use PGRs by diligently testing them for many years on many different crops under different environmental conditions.

Chemtura: Many growers prefer to use the original product but more are looking at post-patent alternatives for economic reasons.

OHP: Growers are going to look to products that will provide the greatest value and the greatest return for them. That being said, the lifeblood of this industry is new innovation, new varieties, new technology. But it's got to have additional tech value and make sense economically. As new technology comes into the marketplace that is properly positioned and developed, growers are going to seek it out because it's going to bring additional value to their bottom line. They're going to compare that again to generic alternatives. But over time, it's clear that the lifeblood of the industry is new development.

Chemtura: Continued research and development is important with any chemicals. New and/or improved PGRs are required to address the changing needs of the grower community (new crops and varieties, new production cycles and methods).

Valent: New products are the lifeblood of any organization. Not only for a company's survival but also for our customers'. New products offer new solutions and in the ornamental business, it is changing every day.

OHP: It brings innovation and we all are interested in new technologies to bring additional value. That only makes sense if it's going to enhance a grower's bottom line, to grow better and deliver a better product to the end user and do that more profitably. **GG**