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**Subject:** RE: DT Cotton and Soybean Estimates

Great comments Keith. Engenia / Outlook grower tie in program would be very helpful. This may rattle a few broker sales loose and give us a tool to sell up.....even if they use Outlook on another crop.

My 2 cents.

V

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**From:** Keith A Castner  
**Sent:** Thursday, June 23, 2016 10:46 AM  
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**Subject:** DT Cotton and Soybean Estimates

Fish-

Good morning! I spent some time polling some key reps and getting some thoughts from key cotton and soybean areas! Cotton info is pretty solid and getting more info before our district meeting! Soybean info is really difficult to estimate, but I gave it my best WAG!

Some Key Points in Cotton-

- ALL of the DT cotton that is planted this year has been sprayed OFF LABEL and growers are being very mum about their applications.
- We Know this from the increase in P/L Clarity sales in our district. My numbers are double from 6,500gal to 12,800gal.
- Some growers have made the comment about this formulation having some phyto on their cotton, but very few.
- Everyone nervous about the Oklahoma Dept of Ag getting wind and setting an example or two.
- Distributor reps and Managers continue to tell growers it IS NOT labelled but product is loaded and delivered ...
- I was in a field of two leaf cotton and ask grower what he sprayed on Pigweeds that were roiled up and dying!! His comment was and I quote " I can't tell you what I sprayed" and we went on to another subject

- The growers that are abiding by the rules are really tempted to go ahead and spray!! Why not?? Everyone else is!! I just don't want to be the one to get caught.
- The success that growers are having with P/L Clarity is really impressive and going to make it very difficult to sell a premium product when they know what worked and is a helluva lot cheaper??
- Monsanto is going to bundle seed and Extend on farm along with good seed and chemical reps AND Roundup Rewards program. This is going to be a hard battle for BASF to compete in!!
- Helena said they had heard that Americot was going direct to the grower with their seed sales. Not going to work and need to know if this is being discussed by Americot of going direct! Huge problem and this is the first I have heard about this.
- I have never seen such a MESS with DT seed being sold before we have registration of Engenia. It was going to be really difficult to get market share against Monsanto in the first place, but growers are going to use the cheapest product they can find.
- We need a Grower Program that could/would help us compete!! If we do nothing and expect to get 50% plus Market Share we are crazy.. No question that Monsanto has and will do everything they can to get seed and chemical sold! Look at what they have already done with advertising and got a jump on BASF.

Just a few comment that I wanted to share from the field level. Looking forward to seeing everyone next week and getting a plan together for Engenia. We have our work cut out, but we can DO IT!!

Have a Great Weekend!

Thanks,  
Keith