

# Asia Fertilizer Industry Outlook to 2017- High Demand for Phosphate and Potash Fertilizers Driven by balanced Fertilization

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## Abstracts

The report titled 'Asia Fertilizer Industry Outlook to 2017- High Demand for Phosphate and Potash Fertilizers Driven by Balanced Fertilization' provides a comprehensive analysis of the various aspects such as market size, segmentation, trends and developments and future projections of the fertilizer industry of major countries in Asia which includes China, India, Indonesia, Thailand, Vietnam, Japan, Philippines, South Korea and Malaysia. The fertilizer industry in Asia majorly comprised of various three major macro nutrients namely nitrogen, phosphate and potash fertilizers and their different products in Asian countries. The increasing population of the Asian economy along with the growing food grain production in different countries would drive the growth of overall Asian fertilizer industry. The report provides the market share and company profiles of major players in major segments.

Fertilizer demand in Asia has mainly been influenced by the changing and interconnected aspects such as economic growth, population, growth of agriculture sector, government policies, prices and production. Asia accounts for almost 50.0% to 60.0% of the total world nutrient use and about 40.0% of the world's crop land. During the period of 2006-2012 the Asian fertilizer industry witnessed surplus use of nitrogen fertilizers, tried reducing the dependency on the imports of phosphate fertilizers and increased the consumption of potash fertilizers in order to ensure balanced nutrition to the crops as well as the soil.

The Asian fertilizer industry has majorly been driven by Chinese and Indian economy during 2006-2012 and these two countries remained the leading producers of fertilizer with a contribution of 55.5% and 29.3% in the overall consumption of Asian fertilizer industry in 2012 respectively. The consumption of fertilizers in Asia has grown at a

CAGR of 3.3% over the period of 2006-2012 and the total consumption of fertilizers reached ~ thousand nutrient tons in 2012. The macro nutrient segment which comprises of nitrogen, phosphate and potash fertilizers has mainly been driven by the nitrogen fertilizers which comprised of more than half of the overall nitrogen market in most of the Asian economies particularly in East and South East Asia. Other countries such as Thailand and Vietnam possess high growth potential with Thailand being the fastest growing fertilizer industry in Asia growing at a CAGR of 7.5% during 2006-2012 is expected to further augment the market with its growth of 10.6% during 2012-2017. Countries such as Indonesia which is concentrated in the hands of few producers such as PT Pupuk Gresik, PT Pupuk Kaltim, PT Pupuk Iskandar Muda would continue to grow at a CAGR of 7.4% during 2012-2017 largely driven by production and consumption of urea. Compound fertilizers particularly NPK fertilizers would witness a higher contribution due to increased emphasis of the government on balanced fertilization.

Increasing food grain production, diversification in consumption pattern of different crops, rising awareness among the farmers and various government initiatives have driven the growth of this market during 2006-2012. These factors would continue to drive the Asian fertilizer industry even in the future years.

In the future years, the largest fertilizer industries of China and India would also be significantly contributed by the micronutrients particularly zinc micro nutrients in China has a market potential of ~ tons. Likewise the consumption of zinc fertilizers reached 84.0% in the overall fertilizer consumption in India in 2012 and would further drive the future demand during 2013-2017.

The Asian fertilizer industry in the coming years is expected to grow at a CAGR of 6.1% reaching over the period of 2012-2017 with the overall consumption of fertilizers reaching about ~ thousand nutrient tons in 2017. In terms of nutrient usage, nitrogen fertilizers would continue to dominate the market with 57.2% share in 2017 followed with increased shares of phosphate and potash fertilizers of 29.7% and 13.1% respectively. The countries would witness increased contribution of compound fertilizers in order to promote balanced fertilization. Developing countries particularly China and India would increase their focus on micro nutrients such as zinc, copper, iron and others. For instance many of the zinc fertilizer projects are coming up in China due to the acute deficiency that has been observed in the Chinese soil

## **KEY TOPICS COVERED IN THE REPORT**

Asia fertilizer market size on the basis of consumption in volume.

The country wise segmentation of fertilizer market in Asia

The nutrient wise segments of fertilizer market in Asia

The market size, future outlook and projections of the fertilizer market of China, India, Thailand, Vietnam, Japan, South Korea, Malaysia and Philippines.

The market segmentation by nutrients namely nitrogen, phosphate and potash for fertilizer market of China, India, Indonesia, Thailand, Vietnam, Japan, South Korea, Malaysia and Philippines.

The market segmentation by product for the fertilizer market of China, India, Indonesia, Thailand, Vietnam, Japan, South Korea, Malaysia and Philippines.

The market segmentation by crop usage for fertilizer market of China, India, Indonesia, Thailand, Vietnam, Japan, Malaysia and Philippines.

Trends and Developments and Government regulations in the fertilizer market of China, India, Indonesia and Vietnam.

Competitive landscape and Company profiles of major players in China, India, Indonesia, Thailand and Vietnam fertilizer market.

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