

India Fertilizer Industry Outlook to FY'2018 - Policy Initiatives on Urea to Enhance Growth

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Abstracts

The report titled “India Fertilizer Industry Outlook to FY’2018 - Policy Initiatives on Urea to Enhance Growth” provides a comprehensive analysis of the market size of the India Fertilizer Industry, market segmentation by inorganic and organic fertilizers, generic and bio fertilizers, and macronutrients and micronutrients. The report also entails the market share of leading companies in overall fertilizers, urea and DAP and company profiles of major domestic players in fertilizer market in India. The report also provides the major trends and developments of the industry in India. An analysis of the future of the Fertilizer Market in India is provided on the basis of revenue of the market over next five years.

The fortune of fertilizer industry is highly dependent on factors such as population growth, government policy and regulation including incentives and subsidies to lower the cost of fertilizers to the farmers

The fertilizer consumption in India has generally exceeded the domestic production in both nitrogenous and phosphatic fertilizers, except for a few years. The entire requirement of potassic fertilizers is met through imports as India does not have commercially feasible sources of potash. India mainly imports urea, DAP and MOP. The imports of nitrogenous fertilizers in the country are through state trading enterprises while imports of P and K fertilizers and raw materials have been decontrolled. However, during the last 6-7 years due to low addition in domestic capacity coupled with the rise in demand for fertilizers, imports have increased significantly. India imported ~ thousand tonnes of fertilizer nutrients in FY’2012 as against ~ thousand tonnes in FY’2011.

The India Fertilizer market experienced a dip, during FY’2008- FY’2009 because of the price volatility. India has witnessed a range of activities in the fertilizer market over the

last few years. The country has witnessed an increase in demand of biofertilizers or organic fertilizers as intense use of chemical fertilizers caused severe damage to the health, ecosystems and ground water of the country and also the demand of micronutrients and secondary macronutrients witness a incline.

The fertilizer market in India was valued at USD ~ million in FY'2013 thus growing at a CAGR of 3.4% from FY'2006- FY'2013. It was observed that in FY'2013, the market witnessed a growth on account of the increasing population and demand of food grains in India.

In FY'2012, macronutrients contributed ~% to the overall fertilizer market as compared to ~% contribution of micronutrients. The consumption of nitrogenous fertilizer witnessed a incline in 2012 and reached ~% as compared to ~ in FY'2006. However, the demand of phosphorus and potassic fertilizer witnessed a decline and reached ~% in FY'2012 as compared to ~% in FY'2006. The production of bio-fertilizers in India increased to ~ tonnes in FY'2011 as compared to ~ tonnes in FY'2010.

Urea is a major nitrogenous straight fertilizer in India and accounted for nearly ~% of India's total nitrogen production in India. . In FY'2012, the consumption of phosphorus fertilizers was ~ thousand tonnes as compared to ~ thousand tonnes in the previous year.

The consumption of NPK fertilizers in India was primarily held by west region which accounted for ~ % share in the overall consumption of fertilizers in India. In the western region, Maharashtra was the leading consumer and accounted for ~% of the overall consumption of fertilizers in the region and consumed nearly ~ thousand tonnes of fertilizers in FY'2011, followed by Gujarat which consumed ~ thousand tonnes of fertilizers during the year.

Indian Farmers Fertilizer Co-operative Ltd is the largest player in the Indian fertilizer market with a market share of ~ followed by National fertilizer limited with market share of ~%, Zuari Agro Chemicals, Nagarjuna Fertilizers and Chemicals Limited with a market share of ~% and ~% respectively in FY'2012.

The micronutrients market is grounded by players such as Aries Agro Limited and Multiplex Group with a market share of ~% and ~% respectively. Chelated micronutrients contributed nearly ~ % of the overall consumption of micronutrients in India in FY'2012

KEY TOPICS COVERED IN THE REPORT

The market size of the India Fertilizer Industry by revenue, FY'2006-FY'2013.

The market size of the India Fertilizer Industry by production and consumption of fertilizer nutrients, FY'2006-FY'2012.

Market segmentation of fertilizer market in India by Inorganic and organic fertilizer, FY'2012

Market Segmentation of fertilizer market in India by Macro and Micro nutrients , FY'2012

Market Segmentation of fertilizer market in India by fertilizer products such as urea, Di-ammonium phosphate(DAP), muriate of potash(MOP), single super phosphate(SSP) and complex fertilizer production and consumption, FY'2006-FY'2012.

Market Share of leading players in fertilizer market in India by revenue,FY'2012

Market Share of leading players in fertilizer market in India by revenue,FY'2012

Market Share of leading players in urea fertilizer market in India,FY'2012

Market share of leading players in Di-ammonium phosphate fertilizer market in India,FY'2012

Market share of leading players in Micronutrients market in India,FY'2012

Company profiles of major domestic players in manufacturing of urea, Di-ammonium phosphate and micronutrients in India.

Trends and developments in fertilizer market.

Future outlook and projections of the basis of revenue in India fertilizer market and footwear market, FY'2014-FY'2018

Contents

1. INDIA FERTILIZER INDUSTRY INTRODUCTION

2. INDIA FERTILIZER MARKET SIZE, FY'2006-FY'2013

- 2.1. By Production and Consumption, FY'2006-FY'2013
- 2.2. By Revenue, FY'2006-FY'2013

3. INDIA FERTILIZER MARKET SEGMENTATION

- 3.1. By Inorganic and Organic Fertilizers, FY'2012
- 3.2. By Generic and Bio-Fertilizers, FY'2006-FY'2012
- 3.3. By Micronutrients and Macronutrients, FY'2012
 - 3.3.1. By Macronutrients Production and Consumption, FY'2006-FY'2012
 - 3.3.1.1. Nitrogenous Fertilizers, FY'2006-FY'2012
 - 3.3.1.2. Phosphatic Fertilizers, FY'2006-FY'2012
 - 3.3.1.3. Potassic Fertilizer, FY'2006-FY'2012
 - 3.3.1.4. By Others, FY'2006-FY'2012
 - 3.3.2. By Micronutrients, FY'2012
 - 3.3.2.1. Chelated Micronutrients
- 3.4. By Fertilizer Products Production and Consumption, FY'2006-FY'2012
 - 3.4.1. By Urea, FY'2006-FY'2012
 - 3.4.2. By Di-Ammonium Phosphate (DAP), FY'2006-FY'2012
 - 3.4.3. By Muriate of Potash (MOP) and Single Super Phosphate (SSP), FY'2006-FY'2012
 - 3.4.1. By Complex Fertilizers, FY'2006-FY'2012
- 3.5. By Crops, FY'2012

4. INDIA FERTILIZER CONSUMPTION BY REGIONS, FY'2008-FY'2011

5. INDIA BIO-FERTILIZER PRODUCTION BY STATES, FY'2006-FY'2012

6. GOVERNMENT REGULATIONS/INITIATIVES IN INDIA FERTILIZER INDUSTRY

7. INDIA FERTILIZER MARKET TRENDS AND DEVELOPMENTS

8. MARKET SHARE OF MAJOR PLAYERS IN INDIA FERTILIZER INDUSTRY

- 8.1. By Revenue, FY'2012
- 8.2. By Urea, FY'2011-FY'2012
- 8.3. By DAP, FY'2012
- 8.4. By Micronutrients, FY'2012

9. INDIA FERTILIZER MARKET FUTURE OUTLOOK

- 9.1.1. India Fertilizer Market Future Projections, FY'2014-FY'2018
 - 9.1.1.1. By Revenue, FY'2014-FY'2018
 - 9.1.1.2. By Urea, DAP and MOP, FY'2013-FY'2017
 - 9.1.1.3. By Macro Nutrients, FY'2014-FY'2018
- 9.1.2. Cause and Effect Relationship between Industry Factors and India Fertilizer Industry Prospects

10. COMPANY PROFILES OF MAJOR PLAYERS IN INDIA FERTILIZER INDUSTRY COMPANY PROFILES

- 10.1. Indian Farmers Fertilizer Co-operative (IFFCO)
 - 10.1.1. Company Overview
 - 10.1.2. Business Strategy
 - 10.1.3. Financial Performance, FY'2007-FY'2012
- 10.2. National Fertilizers Limited
 - 10.2.1. Company Overview
 - 10.2.2. Business Strategy
 - 10.2.3. Financial Performance, FY'2007-FY'2012
- 10.3. Zuari Agro Chemicals
 - 10.3.1. Company Overview
 - 10.3.2. Business Strategy
- 10.4. Nagarjuna Fertilizers and Chemicals Limited
 - 10.4.1. Company Overview
 - 10.4.2. Business Strategy
 - 10.4.3. Financial Performance, FY'2007-FY'2012
- 10.5. KRIBCHO
 - 10.5.1. Company Overview
 - 10.5.2. Business Strategy
 - 10.5.3. Financial Performance, FY'2007-FY'2012

11. MACRO ECONOMIC FACTORS OF INDIA FERTILIZER INDUSTRY: HISTORICAL AND PROJECTED

- 11.1. GDP from Agriculture and Allied Activities, FY'2006- FY'2018
- 11.2. Food grain Production in India, FY'2006-2018
- 11.3. Total Area Under Cultivation for Food Grains and Crops, FY'2016-FY'2018
- 11.4. Population, 2006-2018
- 11.5. Gross Sown Area for Agricultural Inputs, FY'2006-FY'2018

12. APPENDIX

- 12.1. Market Definition
- 12.2. Abbreviations
- 12.3. Research Methodology
- 12.4. Disclaimer

List Of Figures

LIST OF FIGURES

- Figure 1: Types of Fertilizers Used in India
- Figure 2: India Fertilizer Market Size on the Basis of Production in Thousand Tonnes, FY'2006-FY'2013
- Figure 3: India Fertilizer Market Size on the Basis of Consumption in Thousand Tonnes, FY'2006-FY'2013
- Figure 4: India Fertilizer Market Size by Revenue in USD Million, FY'2006-FY'2013
- Figure 5: India Fertilizer Market Segmentation by Organic and Inorganic Fertilizers on the Basis of Contribution in Percentage (%), FY'2012
- Figure 6: India Fertilizer Market Segmentation by Macronutrients and Micronutrients on the Basis of Contribution in Percentage (%), FY'2012
- Figure 7: India Fertilizer Market Size on Consumption and Production of Phosphatic Fertilizers in Thousand Tonnes, FY'2006-FY'2012
- Figure 8: Contribution of Fertilizer Products in Total Phosphatic Nutrient Production in India in Percentage (%), FY'2012
- Figure 9: India Fertilizer Market Size on the Basis of Consumption of Potassic Fertilizer in Thousand Tonnes, FY'2006-FY'2012
- Figure 10: India Fertilizer Market Size on Consumption and Production of Urea in Thousand Tonnes, FY'2006-FY'2012
- Figure 11 : India Fertilizer Market Size on Consumption and Production of Di-Ammonium Phosphate (DAP) in Thousand Tonnes, FY'2006-FY'2012
- Figure 12: India Fertilizer Market Size by Consumption of Muriate of Potash (MOP) and Single Super Phosphate (SSP) in Thousand Tonnes, FY'2006-FY'2012
- Figure 13: India Fertilizer Market Size by Consumption of Complex Fertilizers in Thousand Tonnes, FY'2006-FY'2012
- Figure 14: Crop wise Consumption of Fertilizers in India in Percentage (%), FY'2012
- Figure 15: India Fertilizer Consumption by West, North, South and East Region on the Basis of Contribution in Percentage (%), FY'2008-FY'2011
- Figure 16: India Bio-fertilizer Production by South, West, North and East Region on the Basis of Contribution in Percentage (%), FY'2006-FY'2012
- Figure 17: Market Share of Leading Companies in Urea Fertilizer Market on the Basis of Production in Percentage (%), FY'2012
- Figure 18: Market Share of Leading Companies in DAP on the Basis of Production in India in Percentage (%), FY'2012
- Figure 19: Market Share of Leading Companies in Micronutrients on the Basis of Production in Percentage, FY'2012

Figure 20: India Fertilizer Market Future Projections on the Basis of Revenue in USD Million, FY'2014-FY'2018

Figure 21: India Fertilizer Market Future Projections by Consumption of Urea in Thousand Tonnes, FY'2013-FY'2017

Figure 22: India Fertilizer Market Future Projections by Consumption of DAP in Thousand Tonnes, FY'2013-FY'2017

Figure 23: India Fertilizer Market Future Projections by Consumption of MOP in Thousand Tonnes, FY'2013-FY'2017

Figure 24: Indian Farmers Fertilizer Co-operative Limited Revenue from Fertilizers in USD Million, FY'2007-FY'2012

Figure 25: National Fertilizer Industry Revenue from Fertilizers in USD Million, FY-2007-FY-2012

Figure 26: Nagarjuna Fertilizers and Chemicals Limited Revenue from Fertilizers in USD Million, FY2007-FY'2012

Figure 27: KRIBCHO Revenue from Fertilizers in USD Million, FY2007-FY2012

Figure 28: India GDP from Agriculture and Allied Activities in USD Million, FY'2006-FY'2018

Figure 29: Food Grain Production in India in Million Tons, FY'2006-FY'2018

Figure 30: Total Area under Cultivation of Food Grains and Crops in India in Million Hectares, FY'2006-FY'2018

Figure 31: Population of India in Million, FY'2006 – FY'2018

Figure 32: Gross Sown Area for Agriculture Inputs in India in Million Hectares, FY'2006-FY'2018

List Of Tables

LIST OF TABLES

Table 1: Fertilizer Prices in India in USD per Ton, 2009-2012

Table 2: India Fertilizer Market Segmentation by Organic and Inorganic Fertilizers on the Basis of Revenue in USD Million, FY'2012

Table 3: Organic Fertilizers Production Units Supported by NPOF by Type of Organic Fertilizers on the Basis of Production and Availability in Thousand Tonnes and Area Covered in Thousand Hectares, FY'2011

Table 4: India Fertilizer Market Segmentation by Bio-fertilizers and Generic Fertilizers on the Basis of Production in Thousand Tonnes, FY'2006-FY'2012

Table 5: India Fertilizer Market Segmentation by Bio-fertilizers and Generic on the Basis of Contribution in Percentage (%), FY'2006-FY'2012

Table 6: Bio-Fertilizers Production Units Supported by NPOF under Credit Linked Back-Ended Subsidy Scheme through NABARD and Total Subsidy Committed since the Inception of NPOF in USD Million, FY'2011

Table 7: India Fertilizer Market Segmentation on the Basis of Consumption of Nitrogen, Phosphorus, Potassium, Calcium, Sulfur and Magnesium in Percentage (%), FY'2006-FY'2012

Table 8: India Fertilizer Market Segmentation on the Basis of Consumption of Nitrogen, Phosphorus Potassium, Calcium, Sulfur and Magnesium in Thousand Tonnes, FY'2006-FY'2012

Table 9: India Fertilizer Market Size on Consumption and Production of Nitrogenous Fertilizers in Thousand Tonnes, FY'2006-FY'2012

Table 10: Contribution of Fertilizer Products in Total N Nutrient Production in India in Percentage (%), FY'2012

Table 11: Nutrient Content of High Analysis Fertilizer Materials in Percentage (%)

Table 12: India Fertilizer Market Segmentation by Consumption of Micronutrients in Percentage (%), FY'2012

Table 13: Micronutrients Deficiencies in Soils by States in Percentage (%)

Table 14: India Fertilizer Consumption by West, North, South and East Region in Thousand Tonnes, FY'2008-FY'2011

Table 15: State Wise Consumption of Fertilizer Nutrients in Thousand Tonnes, FY'2008-FY'2011

Table 16: India Bio-fertilizer Production by South, West, North and East Region in Tonnes, FY'2006-FY'2012

Table 17: State Wise Production of Bio-Fertilizers in India in Thousand Tonnes, FY'2006-FY'2011

Table 18: India Subsidy on Fertilizers Released by Urea and P&K Fertilizers in USD Million, FY'2006-FY'2013

Table 19: Per Ton Nutrient Based Subsidy by Fertilizers Products in USD, FY'2011-FY'2012

Table 20: Import of Fertilizer Nutrients in India in Thousand Tonnes, FY'2006 –FY'2012

Table 21: Import of Fertilizer Products in India in Thousand Tonnes, FY'2006-FY'2012

Table 22: Subsidy Paid on Indigenous De-Controlled P&K Fertilizers by Companies in USD Million, FY'2006-FY'2010

Table 23: Market Positioning of Major Players on the Basis of Revenue in USD Million and Percentage, FY 2012

Table 24: Leading Players in Urea Fertilizer Market on the Basis of Production in Thousand Tonnes, FY'2011-FY'2012

Table 25: Leading Players in DAP Fertilizer Market on the Basis of Production in Thousand Tonnes, FY'2011-FY'2012

Table 26: Company Profile of Major Players (Aries Agro, Multiplex Group, Vanita Agrochem, Zuari Agro and Coromandel International) in Micronutrients Manufacturing in India

Table 27: Per ton Additional Subsidy for Fortified Fertilizers with Secondary and Micro-Nutrients as allowed under NBS in USD

Table 28: India Fertilizer Market Future Projections by Consumption of Nitrogenous, Phosphorus, Potassic, Sulphur, Magnesium and Calcium Fertilizer in Percentage (%), FY'2013-FY'2017

Table 29: India Fertilizer Market Future Projections by Consumption of Nitrogenous, Phosphorus, Potassic, Sulphur, Magnesium and Calcium Fertilizer in Thousand Tonnes, FY'2013-FY'2017

Table 30: Cause and Effect Relationship between Industry Factors and Indian Fertilizer Industry Prospects

Table 31: IFFCO Production Unit and their Capacity of Fertilizers in Million TPA, FY'2012

Table 32: IFFCO Sales of Fertilizer Materials in Thousand Tonnes, FY'2011-FY'2012

Table 33: IFFCO sale of Secondary and Micronutrients and Phospho Gypsum in Tonnes, FY'2012

Table 34 : National Fertilizers Limited Production of Urea in Thousand Tons, FY '2010-FY'2012

Table 35: National Fertilizer Limited Production Units by Capacity, FY'2012

Table 36: KRIBCHO Bio-fertilizer Production and Sale in Tonnes, FY'2010-FY'2012

Table 37: KRIBCHO Urea Sales in Thousand Tons, FY'2010-FY'2012

Table 38: Correlation Matrix

Table 39: Regression Matrix

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