

Assessment of the Global Fertilizer Market

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Abstracts

Executive Summary

Over the years, the global fertilizer industry has witnessed increased demand owing to the rising demand for food commodities. The growth of this industry is supported by factors such as population growth, diet diversification, rising income and increasing bio-fuel production. The supply of the three major fertilizer nutrients is expected to rise in the coming years as well.

Despite moderate economic growth post-recession, the demand for food in emerging economies is expected to strengthen the demand for fertilizers. Asia is expected to have the highest demand for fertilizers in 2011-12, driven by the recycling of organic sources and improvements in the fertilizer use efficiency. Fertilizer demand in China is expected to be particularly high, owing to its large population and the poor quality of its arable land.

Why should the report be purchased?

Our report 'Assessment of the Global Fertilizer Market' highlights the structure and performance of the global fertilizer industry. It also analyses the emerging trends and developments in this market, along with the key players in the global industry. The report also captures the supply demand balance in the fertilizer market at the global and regional levels.

Research methodology and delivery time

Smart Research Insights has conducted in depth secondary research to arrive at key insights. Data collected from key industry sources has been analyzed impartially to present a clear picture of the industry. All recent developments which impact the sector

dynamics have been captured and used to support the research hypothesis.

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About Smart Research Insights (SRI)

SRI is a research organization which specializes in niche sector reports. We have a team of dedicated researchers with rich experience across industry segments that focus on delivering high quality analysis. We are also engaged in providing customized research solutions and company reports.

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About

In 2008, in the wake of the global recession, global fertilizer nutrient consumption registered a decline as the demand in most fertilizer-consuming countries reduced. In 2008-09, the expenditure on phosphate and potash reduced substantially in most countries, since farmers reduced or postponed expenditure on fertilizer and other agricultural inputs.

However, in 2009, the market witnessed a marginal recovery in the consumption of nitrogen and phosphate, and it is expected to move towards a stabilized growth from 2010. Driven by the progressive economic recovery, and favorable and stable agricultural market conditions, the world demand of fertilizer nutrients is expected to increase at a CAGR of 2.9% over 2010-14 to reach 272.2mn tonnes. The supply of fertilizers moved towards stabilization, as the demand started recovering in mid-2009 in the main consuming countries. However, in 2009, the overall sales and production decreased significantly due to high inventory carry-overs. Over 2010-14, capacity of ammonia, phosphate and potash is expected to increase in key regions. 65 new ammonia plants are expected to be commissioned, with 23 expected to be launched in China. Phosphate capacity is expected to increase in Asia, Africa, Eastern Europe and Latin America.

Over 2010-14, the imbalance in demand and supply of nitrogen based fertilizers is projected to increase from 3.6% (4.7mn tonnes) of total demand to 11.8% (16.8mn tonnes) of total demand. The imbalance in phosphate is expected to increase in absolute quantity by 0.67mn tonnes to 3mn tonnes or 6.9% of total demand. The imbalance in potash is expected to increase in absolute quantity by 1.45mn tonnes to 9.5mn tonnes, however, the imbalance in proportion to total demand is expected to decline marginally from 27.0% to 26.3%.

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