World Fertilizers

Industry Study with Forecasts for **2014 & 2019**

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Table of Contents

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

OVERVIEW

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

CENTRAL & SOUTH AMERICA

EASTERN EUROPE

AFRICA/MIDEAST

INDUSTRY STRUCTURE

COMPANY PROFILES

List of Tables/Charts

EXECUTIVE SUMMARY

MARKET ENVIRONMENT

OVERVIEW

(continued on following page)

World Fertilizers

Industry Study with Forecasts for ***2014 & 2019***

List of Tables/Charts

NORTH AMERICA

WESTERN EUROPE

ASIA/PACIFIC

CENTRAL & SOUTH AMERICA

EASTERN EUROPE

AFRICA/MIDEAST

INDUSTRY STRUCTURE

World Fertilizers

Industry Study with Forecasts for ***2014 & 2019***

Factors including greater crop requirements for biofuel production and shrinking amounts of arable land will require farmers to improve crop yields, providing opportunities for fertilizers.

World demand to rise 3.8% annually through 2014

World demand for fertilizers is projected to increase 3.8 percent per year to 415 million metric tons in 2014. These gains will reflect an upswing from sluggish growth registered during the 2004 to 2009 period, as individuals reinvest in fertilization programs after reducing their input costs due to high prices and credit issues during 2008 and 2009. A growing global population, increasing consumption of high-protein products that require fertilizer intensive grains, greater crop requirements for biofuel production and shrinking amounts of arable land will require farmers to improve crop yields, providing opportunities for fertilizers. A more balanced nutrient approach to improving soil fertility will provide opportunities for multi-nutrient and organic fertilizer products.

World Fertilizer Demand, 2014
(415 million metric tons)

Dominant agricultural market to rebound from global recession

Agriculture continues to dominate the fertilizer market. Record high raw material costs pushed fertilizer prices upwards during 2008 and parts of 2009. High input costs, in addition to volatile crop prices and a global recession, led farmers to try to keep operating costs in check, in part by reducing or postponing fertilizer applications during 2008 and 2009, particularly phosphate and potash types. Nitrogen fertilizers were not as severely impacted, as this nutrient is relatively quickly removed from the soil and requires more regular application than other nutrient types. In general, fertilizer demand was impacted the most in countries where credit markets tightened due to the global recession and where fertilizer purchases are dependent on debt financing. In 2010, recessionary conditions began to subside, freeing up available credit, and farmers in many parts of the world began to reinvest in fertilizers to increase crop yields. Demand for fertilizer-intensive crops and pricing moderation will also benefit fertilizer use, particularly for phosphate and potash types. In addition, multi-nutrient and organic fertilizers will benefit as farmers shift toward more balanced nutrient delivery systems. Growth in organic food production will provide opportunities for organic fertilizers.

Asia/Pacific region to remain largest market

Among the regional markets, Asia/Pacific will continue to control the largest portion of fertilizer demand, primarily due to its enormous agricultural sector. Above-average gains in fertilizer use will be attributable to the need for higher crop yields on less arable land in order to feed a growing population. Central and South America and Eastern Europe are also projected to offer above-average growth opportunities through 2014.

World Fertilizers

Industry Study with Forecasts for ***2014 & 2019***

Sample Text, Table & Chart

TABLE VI-13

INDONESIA: FERTILIZER SUPPLY & DEMAND

Item	1999	2004	2009	2014	2019
Population (mil persons)					
GDP per capita					
Gross Domestic Product (bil 2008$)					
% agriculture					
Agricultural Value Added (bil 2008$)					
Area Harvested (mil hectares)					
Rice					
Palm					
Corn					
Coconuts					
Rubber					
Other:					
Cassava					
Coffee					
All Other					
mt fertilizer/capita					
mt fertilizer/mil $ GDP					
mt fertilizer/hectare					
Fertilizer Demand (000 metric tons)					
net exports					
Fertilizer Prdctn (000 metric tons)					

SAMPLE TABLE

ASIA/PACIFIC

Indonesia: Fertilizer Demand by Type

Demand for fertilizers in Indonesia is expected to increa percent per year to nearly tw 2014 will benefit from a projectec , and enhance agriculture product s, the gains will occur in the multi s shi more balanced nutrient appr

SAMPLE TEXT

Single-nutrient fertilizer and in Of the single-nutrient fertilizers, nitrogen types are the most Urea accounts for the largest share of the nitrogen fertilizer p category. Phosphate and potash fertilizers find moderate use superphosphates are the most used phosphate fertilizers, whi potash accounts for virtually all of potash fertilizer demand.

Multi-nutrient fertilizers will continue to gain market sh fertilizer types. These fertilizers accounted for 14 percent of fertilizer demand in 2009, up from only four percent in 1999 phosphate-potash compounds account for the majority of mu demand. Nitrogen-phosphate compounds find minimal use i

Other fertilizers account for the remainder of demand. tilizers, such as granulated compost, are expected to experien opportunities in the agriculture market. Historically, organic ing has been minimal in Indonesia, with organic accounting about one percent of total cropland. Rice is the primary organic food grown in Indonesia. However, interest in the development of the organic fertilizer product category is growing. Leading non-organic fertilizer producers are investing in organic fertilizer production facilities, and various municipalities in Indonesia are creating subsidies specifically for organic fertilizer varieties.

202

"Demand for fertilizers in Indonesia is expected to increase 5.4 percent per year to nearly twelve million metric tons in 2014. Gains will be driven by increased agricultural production. Strong gains in building construction expenditures and personal incomes will also provide opportunities."

--Section VI, pg. 203

World Fertilizers

Industry Study with Forecasts for ***2014 & 2019***

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Sample Profile, Table & Forecast

TABLE VI-14

INDONESIA: FERTILIZER DEMAND BY TYPE
(thousand metric tons)

Item	1999	2004	2009	2014	2019
Area Harvested (mil hectares)					
mt fertilizer/hectare					
Fertilizer Demand					
Single-Nutrient:					
Nitrogen					
Phosphate					
Potash					
Multi-Nutrient					
Other					
% Indonesia					
Asia/Pacific Fertilizer Demand					

SAMPLE TABLE

COMPANY PROFILES

PETROKEMIJA DD
Aleja Vukovar 4
Kutina 44320
Croatia
385-44-6
http://wv

Sales: $
Employr

Key Pro

SAMPLE PROFILE

PET... for industrial, agricultural and consumer applications. The Company operates through six segments: Fertilizer Production, Soot Production, Clay Pro... Liquid Fertilizer, Maintenance and Pallet Production. PETRO... is majority owned by the government of Croatia.

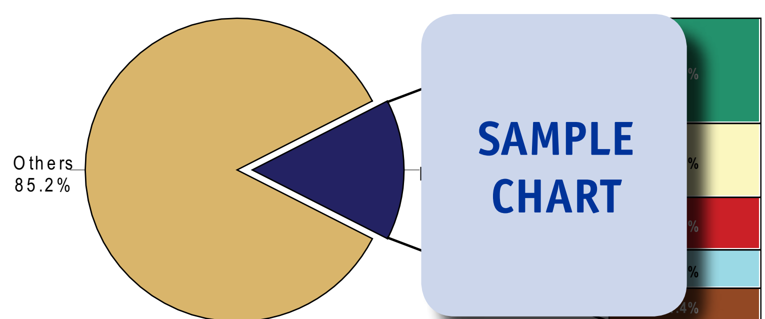
The Company is active in the world fertilizer industry thr... production of solid and liquid fertilizers. Among PETROKEM... solid fertilizers are nitrogen-phosphate-potassium, ammonium ... potassium-ammonium-nitrate and urea-based types. Liquid fer... made by the company include products for flowers, apples, sug... grapevines, vegetables, fruit trees, farm produce, oranges, lem... grapefruit. These fertilizers are sold under the FERTINA bran...

PETROKEMIJA operates a manufacturing facility in Kuti... Croatia. In 2009, the Company produced 870,000 metric tons ... izer. Products are exported to 20 countries worldwide, includi... and Montenegro, Bosnia and Herzegovina, and Slovenia. For ... the Company conducts sales activities through the PETROKEM... doo subsidiary (Serbia) in Serbia.

450

CHART X-1

WORLD FERTILIZER MARKET SHARE, 2009
($163.4 billion)



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Other Studies

Amines

This study analyzes the US amines industry. It presents historical demand data for the years 2000, 2005 and 2010, and forecasts for 2015 and 2020 by product (e.g., ethanolamines, alkylamines, fatty amines, specialty amines, ethyleneamines) and market (e.g., cleaning products, agricultural chemicals, personal care products, petroleum, water treatment, natural gas, plastics, rubber). The study also considers market environment variables, details industry structure, evaluates company market share and profiles industry players.

#2735 .... April 2011 .... $4800

World Lawn & Garden Consumables

Global lawn and garden consumable demand will grow 4.3 percent annually through 2014. Gains will be influenced by the dominant US market, while developing regions grow the fastest from a smaller base. Seeds, fertilizers and growing media will provide fast growth. This study analyzes the $12.7 billion world lawn and garden consumable industry, with forecasts for 2014 and 2019 by product, market, world region and for 17 countries. It also evaluates company market share and profiles industry participants.

#2678 .... October 2010 .... $5800

Enzymes

US demand for enzymes will rise 4.8 percent annually through 2014. Gains will be driven by continued expansion of higher-value specialty enzymes in pharmaceuticals, diagnostics, research and biotechnology, and biocatalysts. In the biofuels segment, growth will moderate as the industry transitions to cellulases for producing biomass ethanol. This study analyzes the $2.2 billion US enzymes industry, with forecasts for 2014 and 2019 by market and product. It also evaluates company market share and profiles industry competitors.

#2670 .... September 2010................ $4900

World Biofuels

Global biofuel demand will grow 10.3 percent annually through 2014. Bioethanol will see the greatest gains, driven by the large North American market as well as the faster growing markets in the Asia/Pacific region and Europe. The smaller biodiesel market will be the more rapidly growing segment. This study analyzes the 74.1 million metric ton global biofuel industry, with forecasts for 2014 and 2019 by product, world region and for 28 countries. It also evaluates company market share and profiles industry participants.

#2668 .... September 2010................ $5900

World Pesticides

Global demand for pesticides will rise 2.9 percent yearly through 2014. Gains will reflect a reversal of declines in 2009, caused in part by a price drop for the leading herbicide, glyphosate. Herbicides and insecticides will remain the largest types. Central and South America will offer the best growth opportunities. This study analyzes the $45 billion world pesticide industry, with forecasts for 2014 and 2019 by product, market, world region and for 39 countries. It also evaluates company market share and profiles industry participants.

#2664 .... August 2010.................. $5800