Indonesia Fertilizer Industry Outlook to 2017
- Escalating Usage of Organic Fertilizers
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INDONESIA FERTILIZER MARKET SIZE AND INTRODUCTION, 2006-2012

The consumption of fertilizers in Indonesia has shown a decent growth of ~% during 2006-2012. Production has also witnessed a favorable growth of 5.9% during the same period. Imports which majorly comprise of phosphate and potash based fertilizers advanced at a CAGR of 16.3% during 2006-2011 while the exports presented a ~% CAGR during 2007-2011. Imports are majorly done by…

Figure: Indonesia Fertilizer Market Size on the Basis of Consumption in Thousand Tons Nutrients, 2006-2012

INDONESIA NITROGEN FERTILIZER MARKET SEGMENTATION BY PRODUCTS, 2006-2012

The nitrogen fertilizer market of Indonesia comprises of urea as the main product. This is because of the monopoly of domestic production in the hands of few players who are mainly producing urea with not much of the innovations in the other nitrogen fertilizer products. In the year 2012, urea contributed ~% of the nitrogen fertilizer segment. However, a decline of ~% was observed in the share of urea due to…
Table: Indonesia Nitrogen Fertilizer Market Segmentation by Products on the Basis of Consumption in Percentage, 2006-2012

<table>
<thead>
<tr>
<th>Category</th>
<th>2006</th>
<th>2007</th>
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<td>Ammonium Sulphate</td>
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INDONESIA POTASH FERTILIZER MARKET SIZE AND INTRODUCTION, 2006-2012

The second largest contributing segment of the Indonesia fertilizer industry is potash fertilizer market which has grown at a CAGR of 11.8% during 2006-2012 and is the fastest growing segment relative to the nitrogen and phosphate based fertilizers. Import of potash fertilizers plays a significant role in the country since not many companies are involved in production of potash in the country…

Figure: Indonesia Potash Fertilizer Market Size on the Basis of Consumption in Thousand Tons Nutrient, 2006-2012
INDONESIA POTASH FERTILIZER MARKET SEGMENTATION BY CROP USAGE, 2006, 2007 AND 2010

Potash fertilizer crop usage is segmented into three major categories which include cereals, oil seeds and others. However, unlike the nitrogen and phosphate fertilizers, maximum application of potassium fertilizers is done in the oil seeds segment led by the oil palm category with a consumption of ~ thousand tons nutrients in 2010. A decline was observed in the contribution of oil seeds as…

Figure: Indonesia Potash Fertilizer Market Segmentation by Crop Usage on the Basis of Consumption in Percentage, 2006, 2007 and 2010

INDONESIA PHOSPHATE FERTILIZER MARKET FUTURE OUTLOOK AND PROJECTIONS, 2013-2017

The phosphate fertilizer market is expected to reach ~ thousand tons nutrient by 2017 growing at a CAGR of 13.8% during 2012-2017. This tremendous growth would be mainly on account of fast growing products such as…
Figure: Indonesia Phosphate Fertilizer Market Future Projections on the Basis of Consumption in Thousand Tons Nutrients, 2013-2017

Table: Indonesia Phosphate Fertilizer Product Market Future Projections on the Basis of Consumption in Thousand Tons Nutrients, 2013-2017

<table>
<thead>
<tr>
<th>Category</th>
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<th>2014</th>
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<td>NPK (P)</td>
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<td>Triple Superphos</td>
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<td>Single Superphos</td>
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<td>Ground Rock Direct Application</td>
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<td>Ammonium Phosphate</td>
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In urea, the largest market share over the years has been of PT Pupuk Kaltim. The company held a market share of ~% in 2012. In 2012, Pupuk Kaltim had one of the largest urea sales of ~ tons for subsidized urea, ~tons in non subsidized urea and ~ tons for urea export…

Table: Market Share of Leading Players in Urea in Indonesia Fertilizer Market on the Basis of Production in Percentage, 2006-2012

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The NPK fertilizer market in Indonesia is dominated by three major players. The leading player in NPK fertilizer market is PT Pupuk Gresik which held a contribution of ~% in 2011. This contribution declined from ~% in 2007 mainly due to

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Table: Market Share of Major Players in NPK Fertilizer in Indonesia Fertilizer Market, 2007-2011

<table>
<thead>
<tr>
<th>Market Share (in Percentage)</th>
<th>2007</th>
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<td>PT Kaltim</td>
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<td>PT Pupuk Kujang</td>
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<td>Others</td>
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INDONESIA FERTILIZER MARKET FUTURE PROJECTIONS, 2013-2017

The government of Indonesia plans to achieve an agriculture sector which is highly competitive, sustainable to ensure food security and should be capable of exporting as well. The government plans to achieve four major targets of sustainable self sufficiency, increased food diversification, enhanced export competitiveness and improving farmer’s welfare with the consumption reaching ~ thousand tons nutrients in 2017. Overall it is expected that in the coming years the demand for urea would remain…

Figure: Indonesia Fertilizer Market Future Projection on the Basis of Consumption in Thousand Tons Nutrient, 2013-2017.
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