

Agri Input Scenario

Plant Protection Chemicals

Indian crop protection industry = about 27,625 Cr

The production capacity = 1, 39,000 Tonnes/annum

Manufacturing Units = 219

Formulation Units = 4000

Consumption of pesticides

1991-1992 = 75,000 Tonnes

2009-2010 = 41,822 Tonnes

Fourth largest producer : United States, Japan and China.

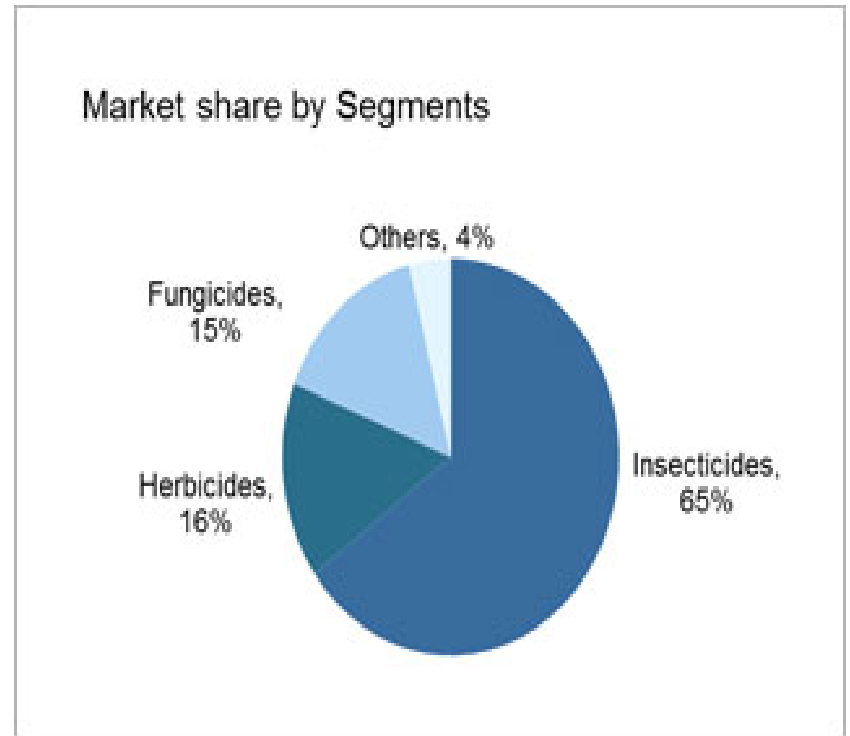
Indian crop protection industry

Insecticides – 65%

Herbicides – 16%

Fungicides – 15%

Rodenticides/ Nematocides 4%



Global scenario of crop protection market

Herbicides = 44%

Fungicides at = 27%,

Insecticides at = 22%

Others at = 7%.

Industry challenges

Low awareness (only 25-30% aware of agrochemicals and their usage).

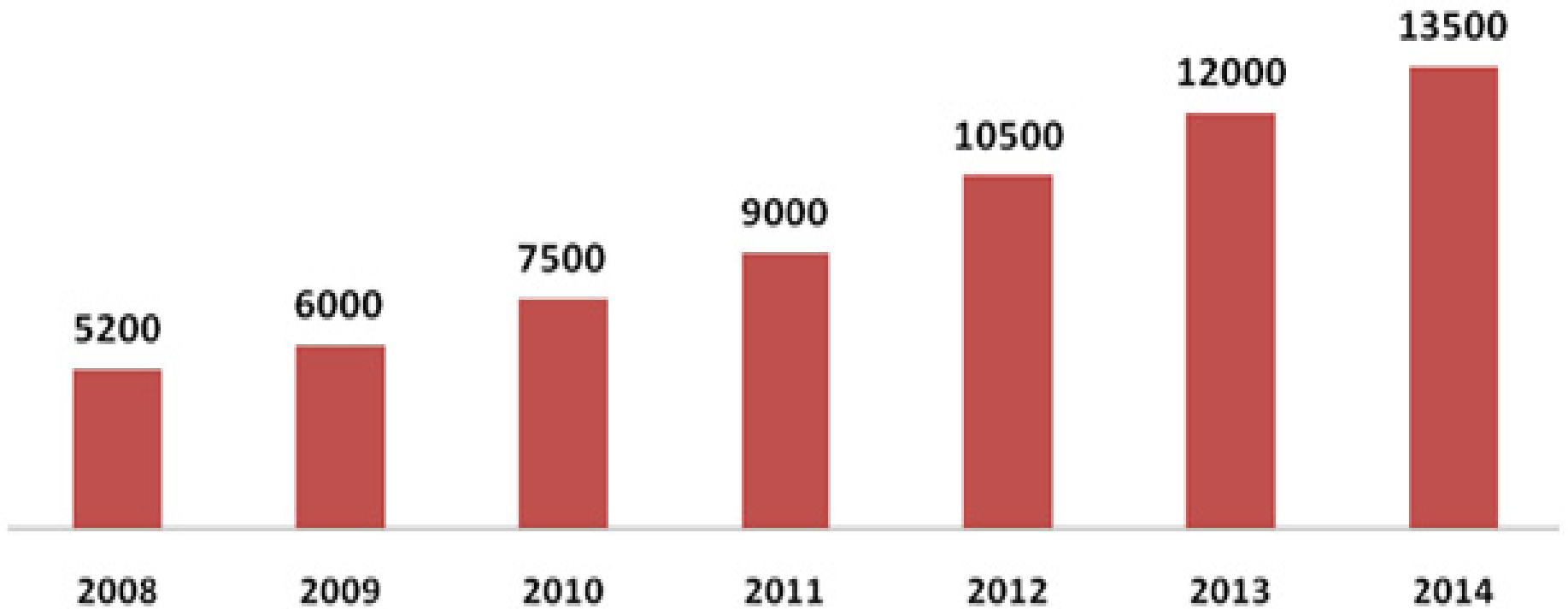
managing inventory & distribution costs

rising sale of spurious pesticides and spiked bio-pesticides

Seed

- Seed accounts for 20-25% agricultural productivity
- There has been shortfall in the availability of certified/quality gram, lentil, pea, soyabean, and potato seeds.

Value in Crores

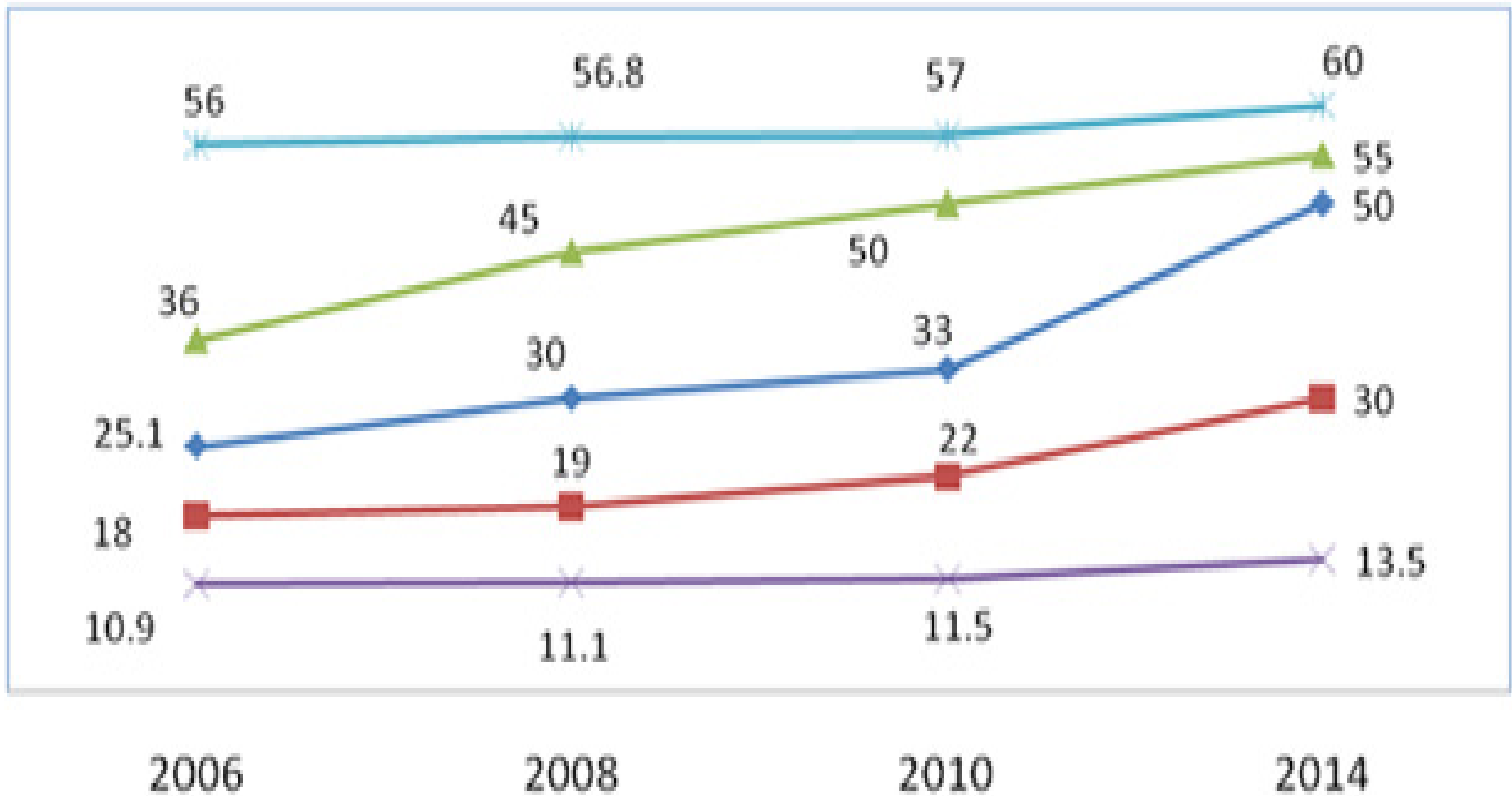


Indian Seed Industry is poised to grow at a CAGR of 17% for next 4 years. By 2014, India will rank at No 3 or 4 in the Global Seed Business.

<http://www.nuziveeduseeds.com/indian-seed-industry/>

Seed Replacement Rate

◆ Paddy ■ Wheat ▲ Maize ✕ Arhar ✕ Mustard



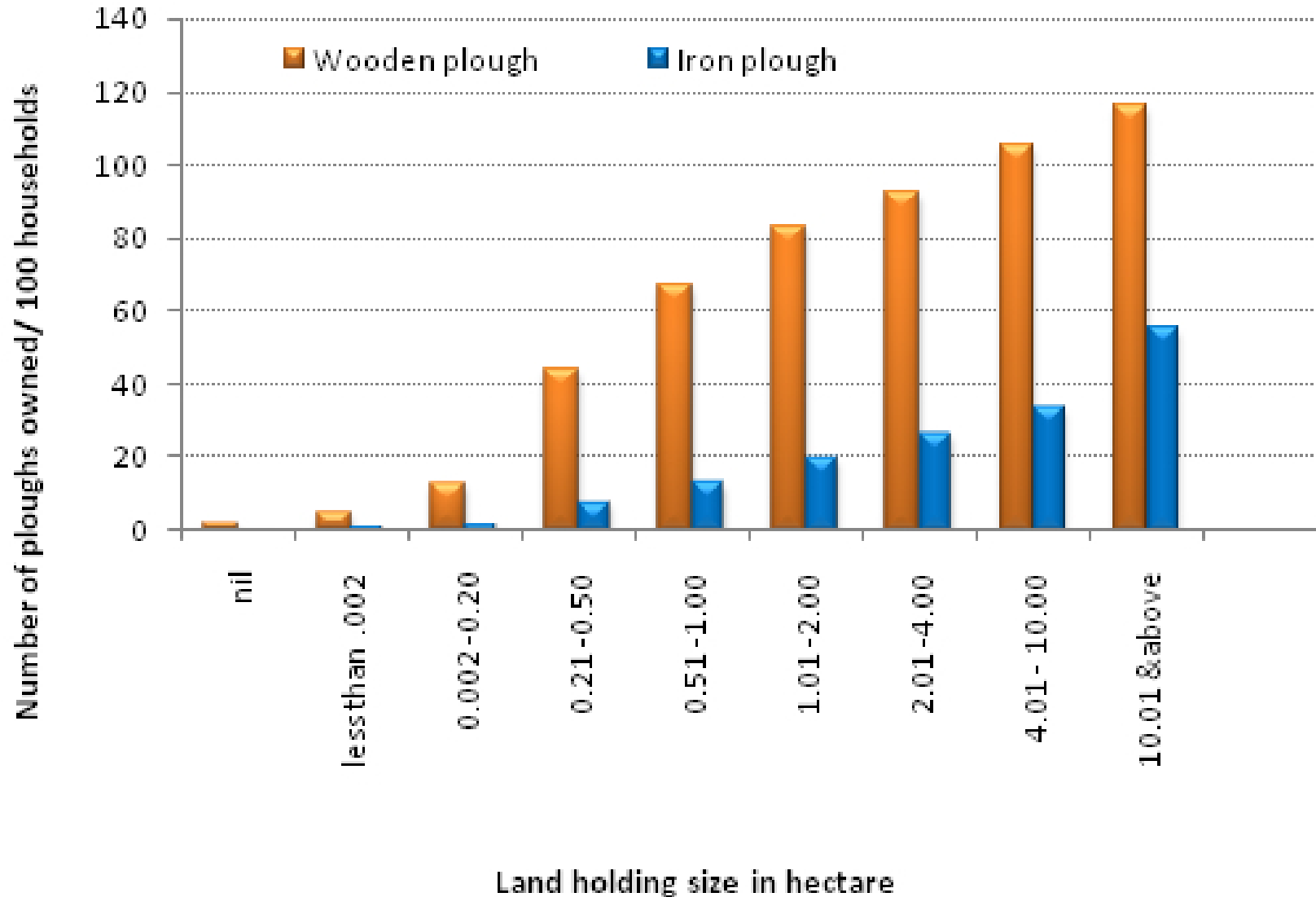
Fertilizers

Demand forecast of fertilizer products (thousand tonnes) 2012-13 to 2016-17

Year	Urea	DAP	NP/NPKs	SSP	MOP*
2013-14	31192	11784	10577	4682	4343
2014-15	32029	12002	10861	5091	4492
2015-16	32858	12212	11142	5513	4643
2016-17	33677	12413	11420	5948	4793
2017-18	33754	12764	11841	6476	4934

**For direct consumption*

Agricultural Implements



challenges to farm mechanization

Highly diverse agriculture with different soil and climatic zones, requiring customized farm machinery and equipment,

Small landholdings with limited resources. Credit flow for farm mechanization is less than 3 per cent of the total credit flow to the agriculture sector.