



Agrochemicals Market – India

January 2011

Executive Summary

Market

- Agrochemicals market in India typically comprises of segment 1, 2 and 3
- Pesticides production in India was X MT in 20--
- Pesticide producers can either be innovators of molecules or generic pesticide manufacturers
- X is the most consumed agrochemical in India, however the consumption of Y and Z is also increasing steadily

Drivers & Challenges

Drivers:

- Increasing food grain production
- Lack of sufficient usage of pesticides
- Patent expiry of molecules providing opportunity
- Government Support

Challenges:

- Flaws in the registration process
- Emerging threat from Biotech seeds
- Health issues with use of banned pesticides

Govt. Regulations & Initiatives

- Body 1 and Body 2 are the leading bodies governing and promoting the growth of pesticide industry in India
- Z Act, 19XX outlays the registration process for manufacture, sale and import export of pesticides in India
- The X Committee in India governs the registration process of pesticides

Competition

- Market is highly competitive with major companies battling for increased market share
- Players are also actively expanding their production capacities and are also reviving their plans
- Company 1, 2, 3, 4 and 5 are some leading companies in the sector



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- **Introduction**
 - Market Overview
 - Drivers & Challenges
 - Government Bodies & Regulations
 - Competition
 - Key Developments



Agrochemicals market in India comprises of segment 1, 2 and 3

Agrochemicals Market – Overview

- Agrochemicals are primarily used for crop protection
- They are often referred to according to the type of pest they control
- In such a classification, agrochemicals are normally categorized into the following major categories:

Segment

Description

Segment 1

- They are agents of chemical or biological origin that control X
- It act against X which feed on crops, leaves, roots, and other parts of plants
- In the Segment 1 sector, one of the largest molecules globally is Product 1

Segment 2

- Safe and do not affect the environment
- Consumption is lower because of availability of cheap labor for X operations
- However, increasing costs of labor will further boost its consumption

Segment 3

- Primarily used to control Z
- High use of new X seeds has led to increase in Z, resulting in higher sales
- In the last Z years, its use has increased from X% to y%
- In Segment 3, Product 2 is the largest selling product

Source:

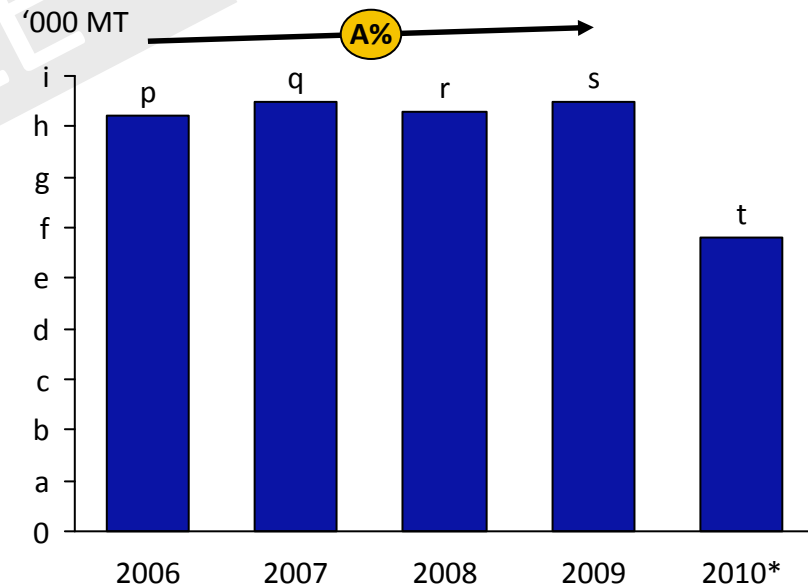


Pesticide production in India is increasing steadily owing to the greater need for food grain production

Production – Overview

- Agrochemicals industry is also known as pesticides market in India
- Ensuring food security for a large population envisages the need for judicious and large use of pesticides in India
- There are X pesticide products currently registered in India
 - ~Z% of these pesticides have been originally registered by multinationals
- Pesticide usage in India extends to X mn hectares
- More than A technical grade pesticides are manufactured indigenously
- India is the Xth largest producer of agrochemicals after Country 1, 2 and 3
 - It is ranked second in X (behind Country 1) and Xth globally
- MNCs play an important role in introducing newer molecules in the country

Production of Pesticides (Volume)

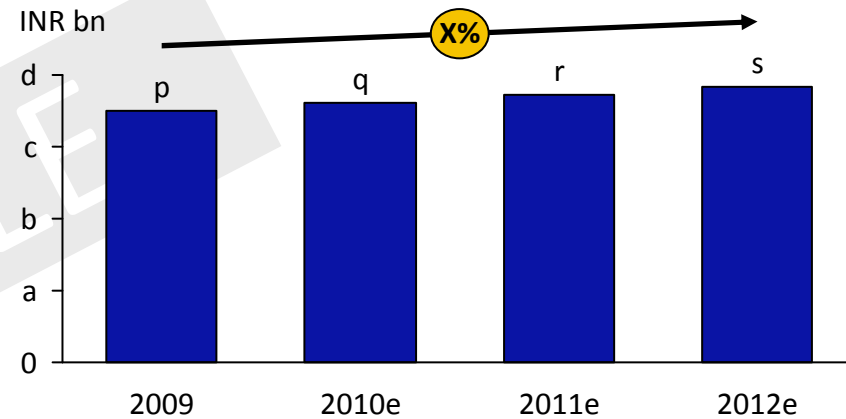


Pesticide consumption in India is dominated by type 1 however type 2 and 3 are also growing

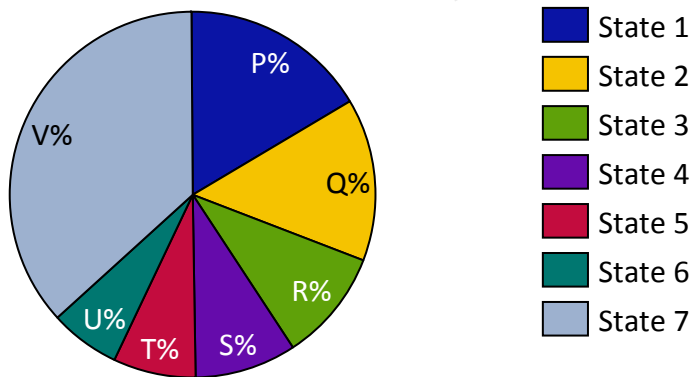
Consumption – Overview

- Total pesticides market in India in 20XX was around USD Z bn including exports
- In FYXX, overall industry witnessed a price increase of X-Y%
- There are 3 types of pesticides – 1, 2 and 3 used worldwide
 - Type 1 are most prevalent in India
 - However, use of type 2 and 3 is also increasing rapidly
- Crop A and B are the two most important crops for the pesticides industry in India

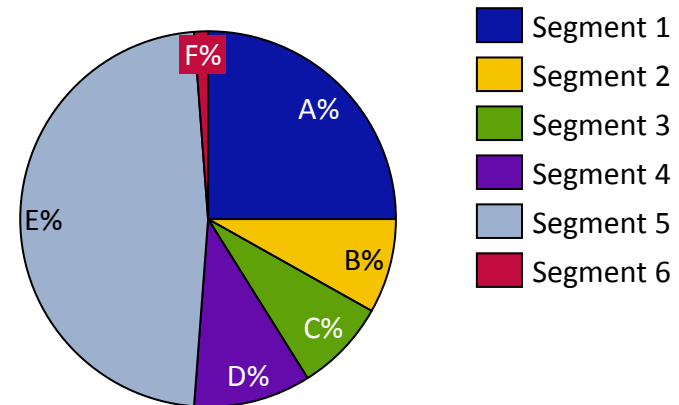
Market Size & Growth



Pesticide Consumption State-wise (FYXX)










Pesticide Market by Usage (20XX)

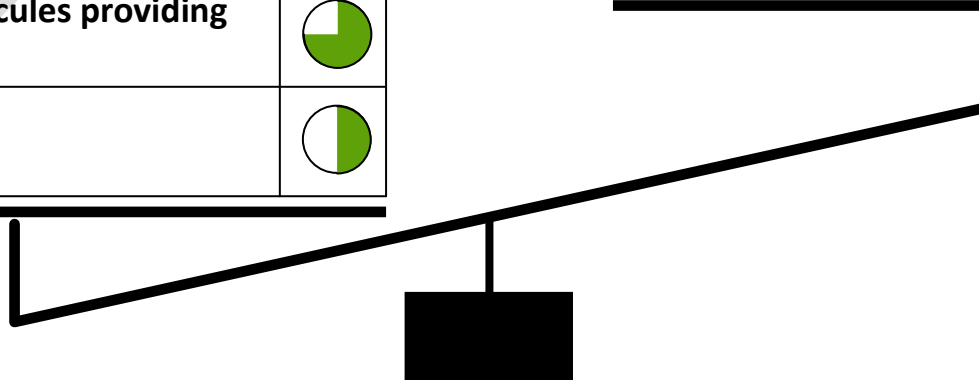


Source:

Drivers & Challenges – Summary

Drivers	
Increasing food grain production	
Lack of sufficient usage of pesticides	
Patent expiry of molecules providing opportunity	
Government Support	

Challenges	
Flaws in the registration process	
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Health issues with use of banned pesticides	

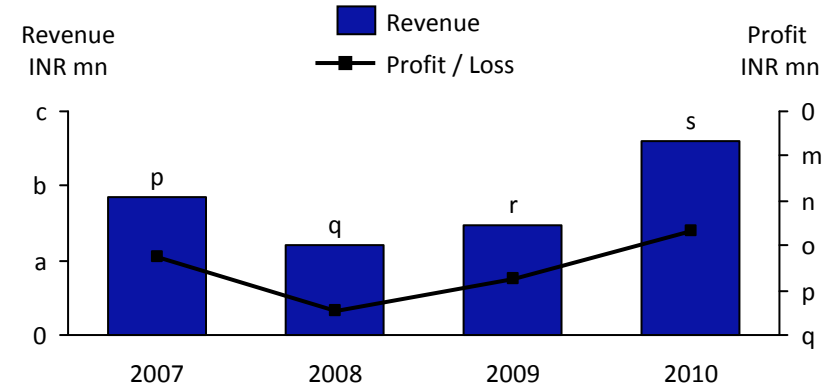


Company Snapshot: Company 1

Corporate Information

Headquarters	State 1
Founded	19XX
Types of Pesticides	Product 1, 2, 3, and 4
Key People	Mr. Z – MD, CEO

Financial Performance



Business Highlights

- It engages in the manufacture and sale of agrochemical products in India and internationally
- Additionally to the various kinds of pesticides, it also offers product X and Y
- In pesticides, its principal products include product 1, 2, 3, 4, 5, 6 and 7 as well as a range of pesticide formulations, such as X, Y, And Z
- It markets its products under the brand name 'X'
- Has set-up a fully automatic Z plant having capacity of X mn litres p.a.
- Has a full fledged R&D department approved by Department of X, Govt. of India, since 19XX



Thank you for the attention

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