1. Send Global and India demand-supply gap data in excel format.

India demand supply till 2021 was part of the scope, although we had given it for 2040 when it was asked further. However, the Global demand-supply gap is not included in the scope.

Also, please note that it is a commercialised product. We understand that the installed capacity, production, and Demand Supply can be given at the Country and Region Level but not at the Global Level. At the global level, it should be zero.

As an Industry practice, import-export data should not be forecasted because it depends on various unforeseen regulatory and logistics practices, including the entry of a new domestic player or the effort of the overseas supplier to push the product into a few countries’ specific markets.

If it is still required (for the directional understanding), we can do it based on historical growth.

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Parameters | FY2017 | FY2019 | FY2021 | FY2025 | FY2030 | FY2035 | FY2040 |
| Production | 3.6 | 4.4 | 5.1 | 5.7 | 6.0 | 6.3 | 6.5 |
| Import | 0.7 | 0.9 | 1.1 | - | - | - | - |
| Export | 1.2 | 1.7 | 2.0 | - | - | - | - |
| Demand | 3.0 | 3.6 | 4.2 | 6.0 | 9.6 | 14.8 | 21.4 |
| Surplus/Gap | - | - | - | -0.3 | -3.6 | -8.5 | -14.9 |
| Existing Capacity | 4.5 | 5.0 | 6.3 | 7.0 | 7.0 | 7.0 | 7.0 |

1. Send report data tables in Excel format.

We have sent the Market Estimation Sheet (MES) for the Agrochemicals, which includes all the table data in the report's pdf version. Dated Dec 30, 2022

1. Competitive landscape – Please share contribution of Companies like Bayer, BASF, Rallis, Meghmani, Dhanuka

The companies mentioned do not come under the top 5 suppliers (as per the scope) of agrochemicals in the Indian market. Therefore, their contribution had not been included. Please find below the matrix

|  |  |
| --- | --- |
| Companies | Market Share |
| BASF | 3.6%-4.0% |
| Bayer | 3.7 %-3.9% |
| Rallis | 3.4%-3.6% |
| Meghamani | 2.1%-2.3% |
| Dhanuka | 1.0%-1.3% |

1. Competitive landscape – mention capacity and operating rate

The respective capacities and production have been mentioned in the pdf version of the report under the company profile chapter for the top 5 suppliers. By taking the ratio, we can mention the Operating Rate. Please confirm if we understood you correctly. (Page 43 to 47)

1. Huge price difference is observed for raw material prices. Price for each 52 agrochemical was out of the scope but had given this. The prices given are the spot prices. It will drastically vary based on the agreement tenure, volume, past relationships, etc. Developing an insight based on the above would mislead.
2. Please mention type of price for Formulation and Active ingredient/Raw material – Ex warehouse, FOB, Net realized, MRP, GST%, transportation? Ex-Factory Price
3. For additional capacity suggested (total 20000KTA) – Please include additional comments to justify. It was out of the scope but generated this output and was never part of the study. Per our conversation, the additional suggested capacity has been based on a few guesstimates and assumptions mentioned in the excel. Also, please note that Agrochemicals' capacity has a swing setup kind of capacity. It means that depending on the market conditions, the capacity can be changed. The manufacturing setup for agrochemicals does not require much technical setup.
4. Prices of below molecule are missing.

Unit- INR/ Kg

|  |  |  |
| --- | --- | --- |
| Products | Formulation Price | Active Ingredient Price |
| Buprofezine | 400 | 25 |
| Dimethoate | 520 | 22 |
| Quaizalofopehtyl | 1400 | 53 |
| Propaquizafop | 1670 | 172 |
| 2, 4-D 34.2 EC (Ester Salt) | 405 | 134 |
| Glufonisate Ammonium | 600 | 99 |
| Piroxofop | 2771 | 372 |
| 2, 4-D 58 EC (Amine Salt) | 470 | 288 |
| Copper Oxychloride | 317 | 196 |