

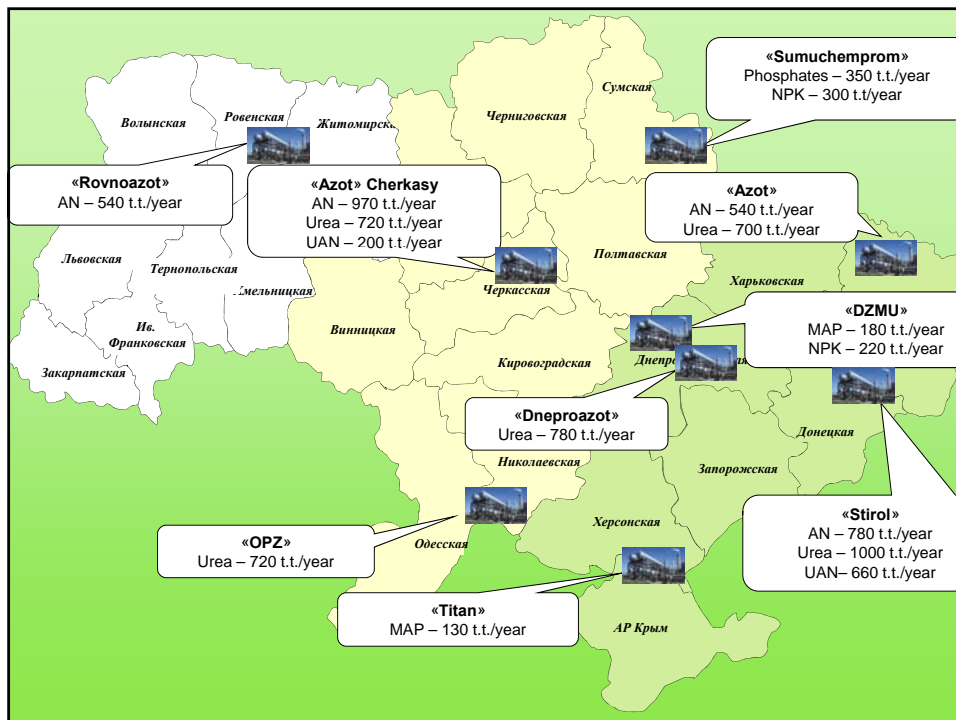


FERTILIZER AND AGRICULTURAL PRODUCTS DEMAND IN UKRAINE

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Fertilizer and Agricultural Products Demand in Ukraine

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What Ukrainian chemical industry is?

Ukrainian export

Products	2007	2008	2009
Iron metallurgy products	41%	39%	27%
Agricultural products	13%	12%	25%
Chemicals	10%	10%	8%
Vehicles	7%	6%	4%
Machinery	6%	5%	7%
Energy	6%	6%	4%
Ironware	6%	5%	6%
Instruments	5%	5%	6%
Raw materials	3%	4%	4%
Light industry products	3%	2%	3%
Pulp and paper industry products	2%	1%	2%
Non-iron metallurgy products	2%	2%	1%
Wood industry products	2%	1%	2%
Glass, ceramic, refractory	1%	1%	1%
Pharmaceutics	0,2%	0,2%	0,4%

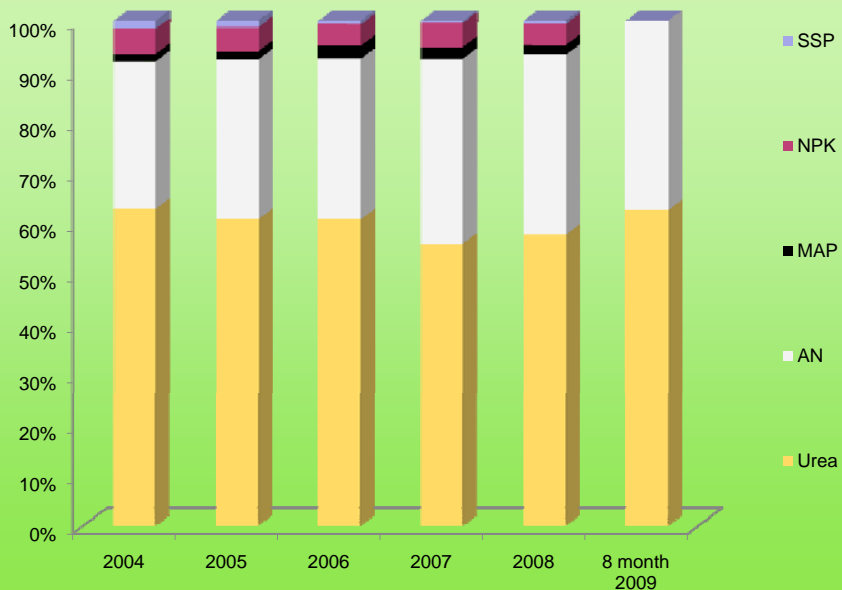
Products	2007	2008	2009
Innorganic chemicals	24%	28%	22%
Fertilizers	27%	33%	34%
Polymers	15%	12%	12%
Rubber and rubber goods	6%	5%	6%
Others	4%	4%	8%
Paints and lacquers	6%	5%	6%
Organic chemicals	15%	8%	4%
Cosmetics	3%	3%	4%
Detergents	1%	2%	3%

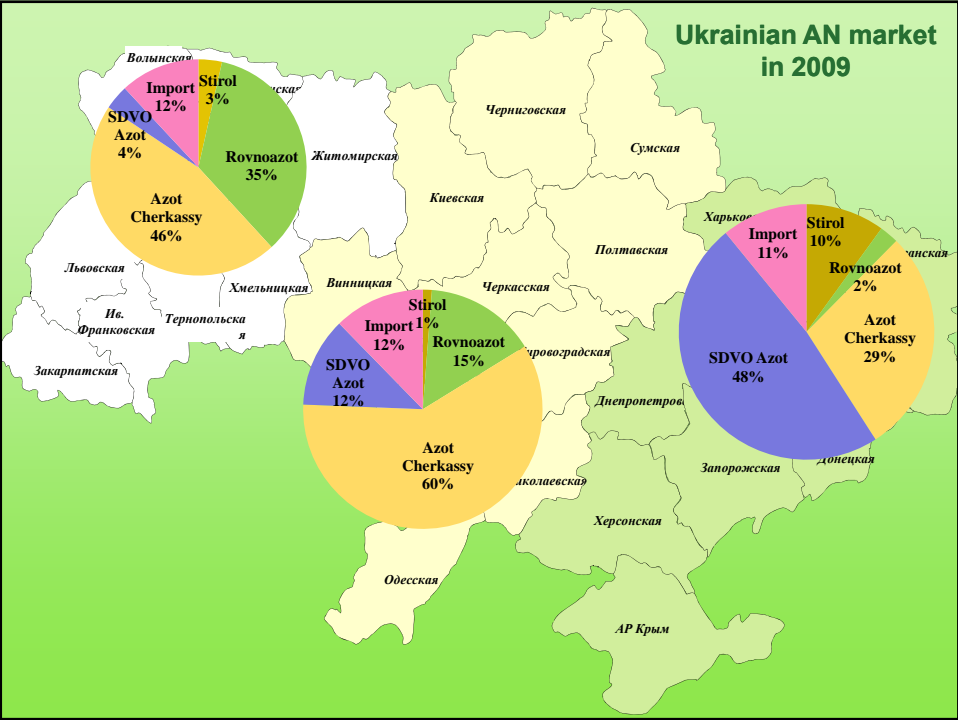
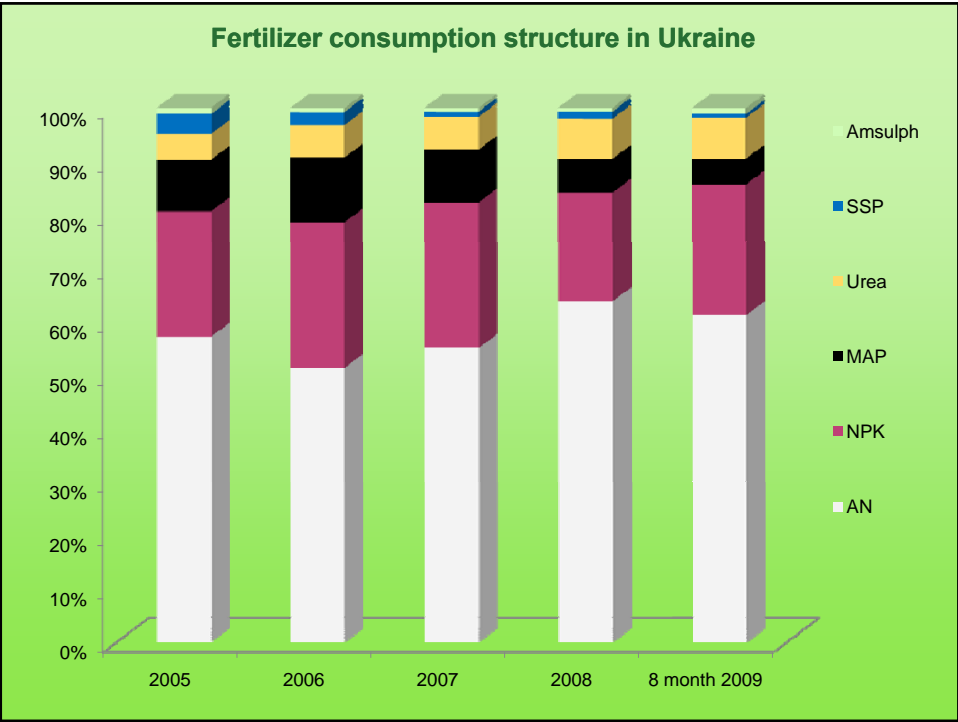
Chemical industry = 7-9% GDP

300 000 work plases

36 000 workers in fertilizer sectors

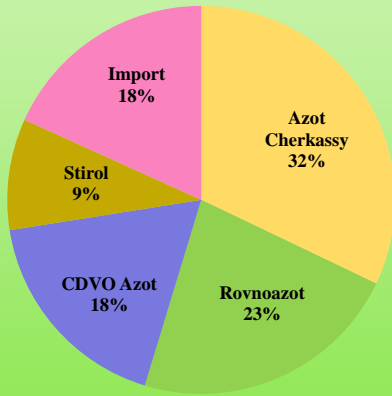
Fertilizer production structure in Ukraine



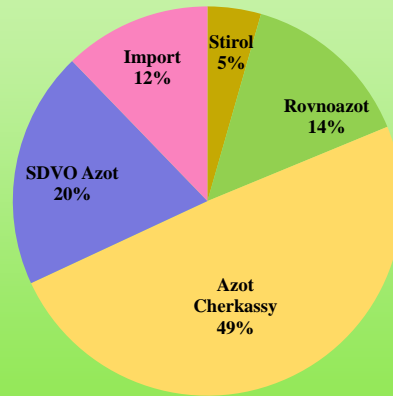


AN producers market shares

2008 year

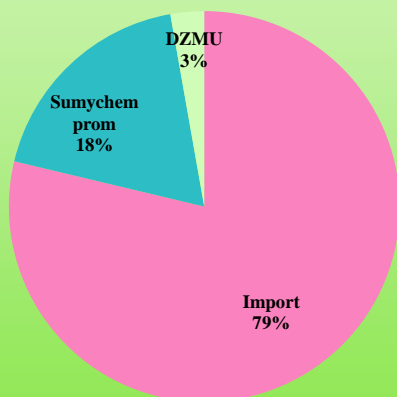


2009 year

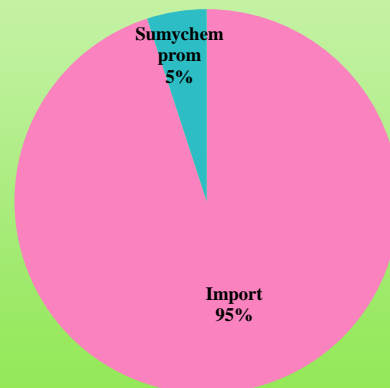


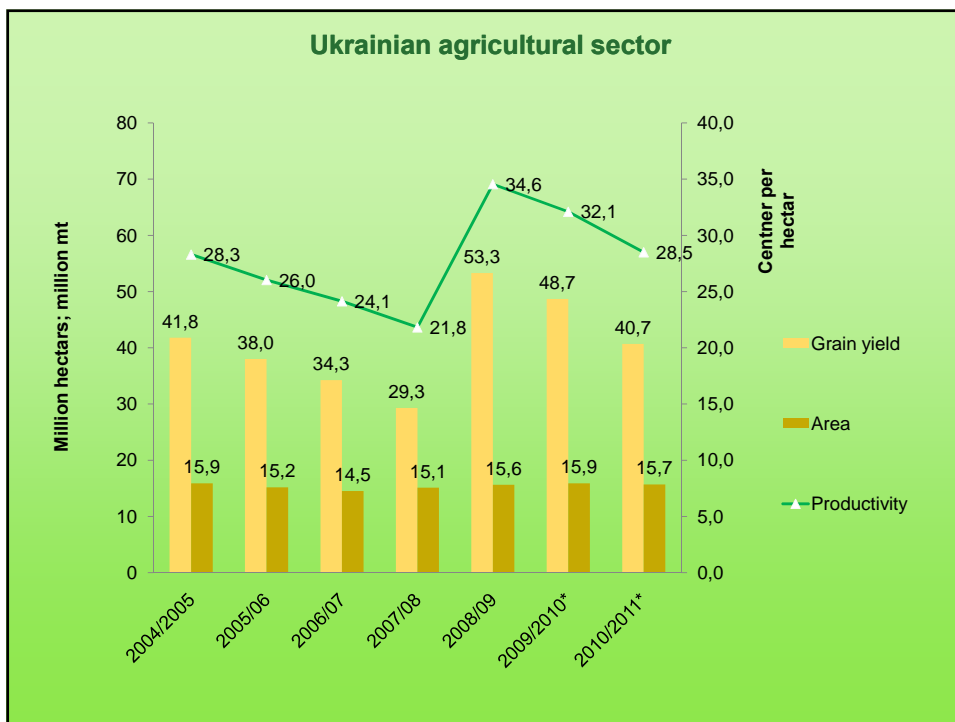
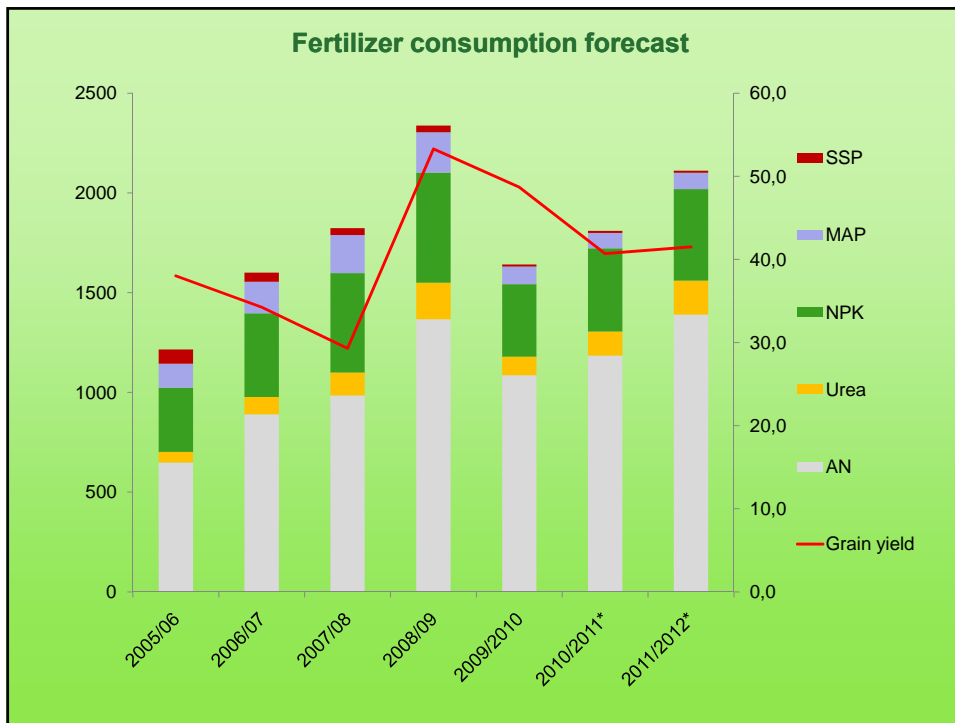
NPK producers market shares

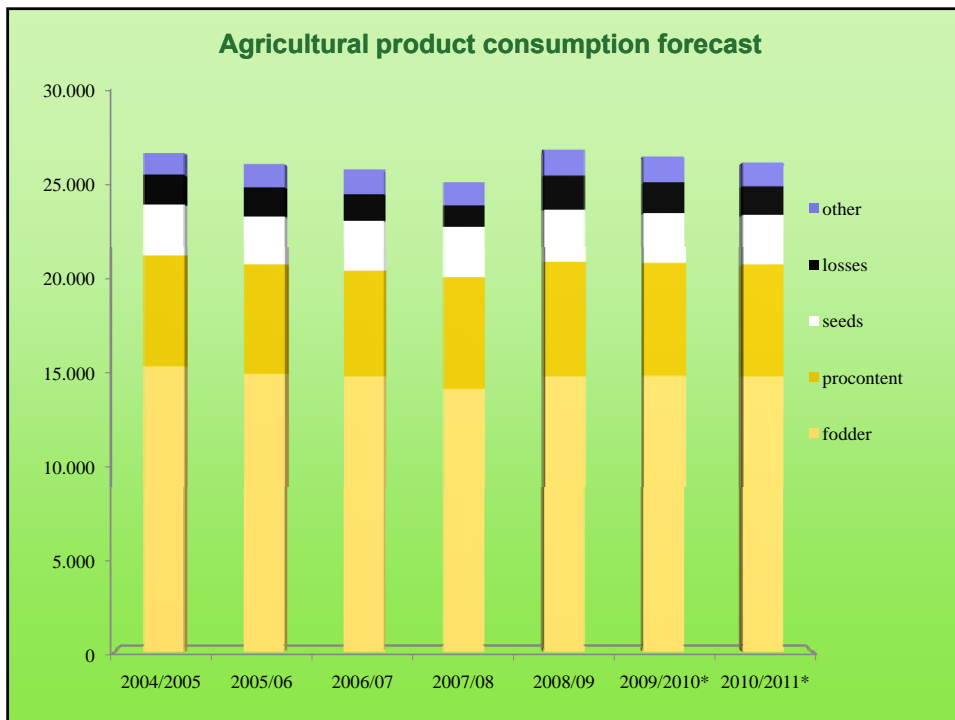
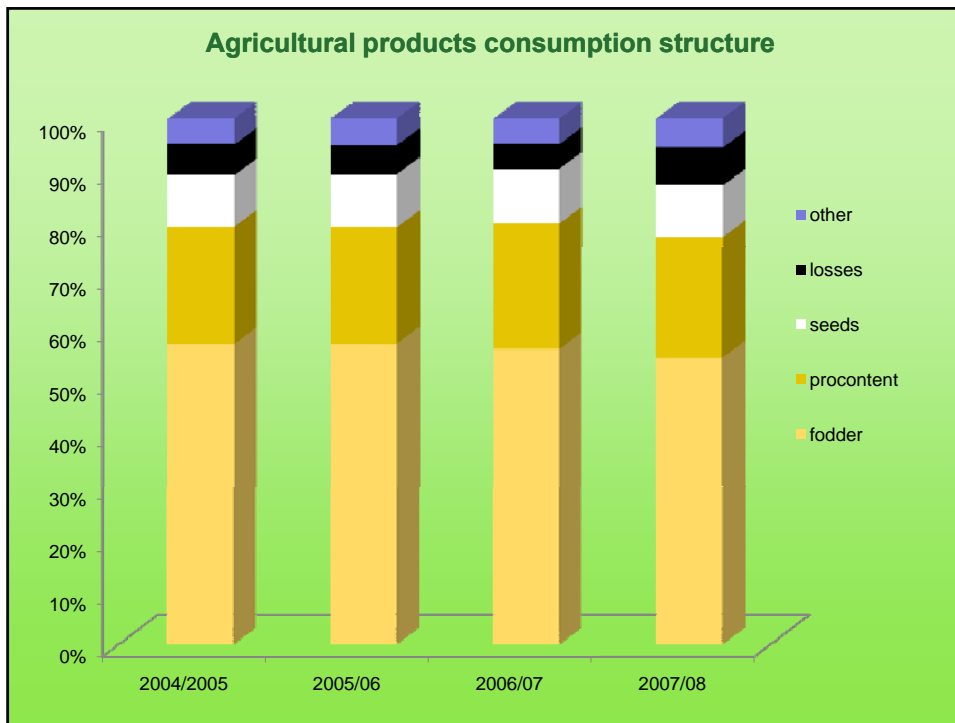
2008 year



2009 year







Conclusion

- ▶ **Despite all the difficulties, the agricultural complex will save the high crop capacity index in the near future (average grain croppage 40 million. mt**
- ▶ **From 2010 consumption of mineral fertilizers in Ukraine will grow**
- ▶ **Till 2012 capacity of Ukrainian AN market will considerably grow to 1.5 million mt**
- ▶ **The consumption of urea and NPK-fertilizers will also grow in Ukraine 460 thn. Mt**
- ▶ **Next 2 years phosphoric fertilizers consumption will be low**