

U.S. Controlled-Release Fertilizer Imports and Exports

A Continuing Monitoring, Analysis, and
Reporting Service



Offered by:



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Introduction

Since 2003, AgIndustries Research & Consulting, Inc.'s (AgIndustries') **U.S. Controlled-Release Fertilizer Imports and Exports Monitoring Service** has provided client companies marketing controlled-release fertilizers (CRFs) in the United States with market intelligence that assists them to:

- Identify and track CRF products entering the U.S. market from off-shore sources
- Track U.S. export shipments of CRF and CRF-based products by exporting company and country of destination
- Follow trends and recognize significant changes in CRF imports or exports by company, product, and/or country.

The 2012 Monitoring Service will continue to provide subscribers with monthly monitoring, analysis, and reporting of water-borne shipments of CRF products to and from the world's largest market. This prospectus outlines the scope of the Monitoring Service for 2012, describes the deliverables, and indicates the anticipated reporting schedule.

Although the monitoring service was not offered in 2011, because of other AgIndustries project commitments, companies needing CRF imports and exports data for 2011 can now subscribe to a 2011 summary report that will provide the full year's imports and exports data, plus analysis of significant trends during that year.

Objectives

The overall objective of the Monitoring Service is to provide companies in the global specialty fertilizers industry with continuing monitoring, analysis, and timely reporting of U.S. imports and exports of CRF products. The 2012 Monitoring Service will provide subscribers with monthly reports on:

- **U.S. imports** of the following products:
 - Urea-formaldehyde (UF)-based CRF products (e.g., Sazolene[®])
 - IBDU
 - Polymer-coated fertilizers (Meister[®], Multicote[®], Nutricote[®], Osmocote[®], Plantacote Pluss[®], others)
 - Other manufactured CRF products (e.g., planting tablets, briquettes)
 - Granular NPK substrates for polymer-coated fertilizers.
- **U.S. exports** of the following:
 - Solid UF-based fertilizers

Objectives (Continued)

- Liquid UF-based fertilizers
- Polymer-coated sulfur-coated urea (PCSCU)
- Polymer-coated fertilizers
- MagAmp®
- Fertilizer spikes and tablets
- Specialty fertilizers exported by companies known to produce and/or market blended or homogeneous granular turf or ornamental fertilizer products containing CRF materials
- Nitrogen stabilizers and stabilized nitrogen fertilizers.

Each monthly report will provide the following information and data on **U.S. CRF imports** on a shipment-by-shipment basis, as available:

- Vessel arrival date
- Commodity description (as per ship's manifest)
- Product trade name and/or CRF product type
- Name and location (city and country) of the foreign shipper (which may be the product manufacturer or another company such as a freight forwarder)
- Name of the product manufacturer
- Country of origin
- Port of origin
- Intermediate foreign port, if any
- Name and location (city and state) of the U.S. importing company
- U.S. port of entry
- Destination city and state
- Ship line
- Estimated cargo value
- Quantity (number of units)

Objectives (Continued)

- Unit of measure (package type; e.g., bag, bulk bag)
- Cargo weight in pounds, short tons, and metric tons.

Monthly reports on **U.S. CRF exports** will provide the following information by individual shipment, as available:

- Vessel sailing date
- Commodity description (as per ship's manifest)
- Product trade name and/or CRF product type
- Name and location (city and state) of the U.S. exporter
- Name of the product manufacturer
- Origin city and state
- U.S. port of export
- Foreign intermediate port, if any
- Foreign port of destination
- Country of destination
- Ship line
- Estimated cargo value
- Quantity (number of units)
- Unit of measure (package type)
- Cargo weight in pounds, short tons, and metric tons.

Please note that the Service monitors only water-borne U.S. CRF imports and exports. Truck and rail shipments to or from Canada or Mexico are not part of the Service's scope.

Approach

Imports and exports of CRF products are not identifiable in publicly available U.S. government foreign trade reports and databases. Accordingly, in researching CRF markets, AgIndustries relies on UBM Global Trade, Inc.'s *Port Import Export Reporting Service* (PIERS) electronic database as the primary basis for estimating U.S. CRF imports and exports by product type. Drawing on bills of lading and vessel manifests from every leading U.S. port, the PIERS database contains information on individual water-borne shipments of all types of fertilizers to and from the United States.

Although the PIERS data are detailed, a considerable amount of analysis is required to determine the specific products that are being imported and exported, given that the information that PIERS copies directly from vessel manifests is often incomplete and/or misspelled. Furthermore, manifest cargo descriptions are often nonspecific (e.g., “fertilizer” or “fertilizer, nonhazardous”).

For the 2012 Monitoring Service, relying on our experience in working with the PIERS database and our knowledge of CRF products, manufacturers, and production locations, AgIndustries will select the appropriate records from the PIERS database, analyze these data in order to fill in blanks, and identify products by trade name and/or product type. This analysis will entail a certain amount of conjecture when information is incomplete, but given our extensive knowledge of the field, AgIndustries is confident that we can provide subscribers with valuable clarification of uncertainties in the PIERS data.

Deliverables and Schedule

Subscribers to the **U.S. Controlled-Release Fertilizer Imports and Exports Monitoring Service** for 2012 will receive monthly reports, each consisting of two Microsoft Excel spreadsheet files—one for imports and one for exports. In each file, the individual shipment data will be sorted and subtotaled by product type and/or by specific CRF product. The spreadsheet format will allow subscribers to re-sort the shipment records according to their particular interests or requirements.

AgIndustries will also provide four quarterly summary reports and a final annual summary report. The quarterly summary reports will summarize and compare CRF imports and exports by product in the respective quarters for 2011 and 2012. The final annual report will summarize and compare CRF imports and exports by product in calendar years 2011 and 2012, and will also include annotations indicating significant departures from trends since January 2011 (e.g., declines or spikes in shipments; marked variations in imports in regard to national origins, in tonnages shipped from specific countries, or in destinations for products of U.S. manufacturers). The quarterly and annual summary reports will consist primarily of Excel spreadsheets and charts. Annotations will be provided in a Microsoft Word document. Delivery of all reports will be by e-mail. The delivery schedule we anticipate is shown on the following page.

Deliverables and Schedule (Continued)

Report(s)	Expected Delivery Date
January, February, March	July 2012
Q1 Summary	Late July 2012
April, May	August 2012
June	September
Q2 Summary	Late September 2012
July	October 2012
August	November 2012
September	December 2012
Q3 Summary	Late December 2012
October	January 2013
November	February 2013
December	March 2013
Q4 Summary	Late March 2013
Annual Summary for 2012	April 2013

2011 Summary Report

Subscribers to the 2011 Summary report will receive two Microsoft Excel spreadsheet files—one for import shipments from January 1-December 31, and the other for export shipments from January 1-December 31. Summary and analysis of the 2011 imports and exports data will be provided in a Microsoft Word document and Excel tables and charts. The 2011 summary report will be delivered in July 2012.

Contractual Terms

Subscription Fees

The fee to subscribe to the **U.S. Controlled-Release Fertilizer Imports and Exports Monitoring Service** for calendar year 2012 is US\$4,500. The fee to subscribe to the 2011 U.S. Controlled-Release Fertilizer Imports and Exports Summary report is US\$2,000.

The fee to subscribe to both the 2012 Monitoring Service and the 2011 Summary report is US\$5,500, representing a discount of US\$1,000 (more than 15%) off the total fee.

Contractual Terms (Continued)

Proprietary Handling

All of the electronic files provided to clients of the Service are for the sole and confidential use of the subscribing companies and their majority-owned subsidiaries. Therefore, each subscriber agrees to take reasonable precautions to protect the confidentiality of the reports. Subscribing companies owned by other companies are not entitled to provide the reports to owners with less than a majority share, nor are joint venture companies or industry or trade associations entitled to subscribe on behalf of their individual owners or members.

About AgIndustries

AgIndustries, founded in 1998, is a California-based independent consulting firm specializing in market, competitive, and strategic analyses for the crop protection and specialty fertilizer industries. Its founder and Managing Director, Sarah P. Landels, was previously a Senior Consultant at SRI International and its subsidiary SRI Consulting (SRIC). During her more than 30 years as a consultant, she has undertaken a wide range of projects related to crop protection and specialty and CRF technologies and products, suppliers, markets, and the competitive environment for client companies worldwide. She has designed and led numerous multiclient studies covering U.S. specialty crop, professional turf, and ornamentals markets for pesticides and CRFs.

AgIndustries offers comprehensive and detailed marketing research studies and industry analyses on a shared-cost multiclient basis, as well as customized and proprietary consulting services for individual client firms. In May 2012, AgIndustries published the report of its second multiclient marketing research study on *Enhanced-Efficiency Fertilizers* which covers CRFs, nitrogen stabilizers, and stabilized nitrogen fertilizers. As required for the efficient conduct of both multiclient projects and single-client consulting assignments, AgIndustries draws on a nationwide and international network of experienced independent consultants who have specific technology, industry, and/or regional market knowledge and expertise.

For Additional Information, please contact:

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Order Form

Fax to (209) 722-7358

To subscribe to the U.S. Controlled-Release Fertilizer Imports and Exports Monitoring Service for the 2012 calendar year and/or to the U.S. Controlled-Release Fertilizer Imports and Exports Summary Report for 2011, please fill out both sides of this form and mail or fax it to:

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Managing Director
AgIndustries Research & Consulting, Inc.
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Merced, CA 95340, USA

Facsimile (209) 722-7358

- ☐ We wish to subscribe to the **U.S. Controlled-Release Fertilizer Imports and Exports Monitoring Service** for 2012 and agree to the contractual terms outlined in this brochure. We understand that the cost is US\$4,500.
- ☐ We wish to subscribe to the **U.S. Controlled-Release Fertilizer Imports and Exports Summary Report for 2011** and agree to the contractual terms outlined in this brochure. We understand that the cost is US\$2,000.
- ☐ We wish to subscribe to **both** the Monitoring Service for 2012 and the Summary Report for 2011 and agree to the contractual terms outlined in this brochure. We understand that the total cost is US\$5,500.

Payment Options:

- ☐ Please send me an invoice.
- ☐ Please send me details on how to pay by bank wire transfer.

Monitoring Service reports and data files are for the sole and confidential use of subscribing companies and their majority-owned subsidiaries. As a subscriber, I agree to protect the confidential nature of the Service reports. Subscribers owned by other companies are not entitled to provide the reports to owners with less than a majority share, nor are joint venture companies or industry or trade associations entitled to subscribe on behalf of their individual owners or members.

Signature _____
Company _____ Date _____

Order Form (Concluded)

Signer's Name _____

Signer's Title _____

Division/Department _____

Company _____

Street Address _____

City/State _____ Zip or Mail Code _____

Country _____ E-mail _____

Telephone _____ Facsimile_____

Special Invoicing Instructions _____

Special Mailing Instructions _____
