



National Fertilizer Industry

Current Situation & Future Development

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Industry's Milestones

	Description	Start Prod.	Product	Capacity Ton/Year	Remarks
1959	PT Pusri established in Palembang				
	PUSRI II Plant	1974	Urea	552,000	
	PUSRI III & IV Plant	1976 / 77	Urea	570,000	
	PUSRI IB Plant (Replacement of Pusri-I)	1993	Urea	570,000	
1972	PT Petrokimia Gresik established in Gresik				
	ZA I Plant	1972	Am. Sulphate	200,000	
	ZA II / III Plant	1984 / 86	Am. Sulphate	250,000/200,000	
	SP-36 I / II Plant	1979 / 83	Phosphate	(2x) 500,000	
	Urea Plant	1995	Urea	462,000	
	Phonska (NPK) Plant	1999	Comp. Fert.	300,000	
1975	PT Pupuk Kujang established in Cikampek	1979	Urea	586,000	
	Kujang 1B Plant	2005	Urea	570,000	Start-up, Agt 05.
1979	PT Pusri appointed as sole distributor for all Fertilizer (National Fertilizer Distribution Facility Project)				
1977	PT Pupuk Kaltim established in Bontang				
	Kaltim 1 Plant	1984	Urea	700,000	
	Kaltim 2 / 3 Plant	1985 / 89	Urea	(2x) 570,000	
	Popka plant	1999	Urea (Granule)	570,000	
	Kaltim 4 Plant	2002	Urea (Granule)	570,000	
1979	Asean Aceh Fertilizer established in Lhokseumawe	1983	Urea	630,000	Liquidated 2006
1982	PT PIM established in Lhokseumawe	1984	Urea	600,000	
	PIM-2 Plant	2005	Urea (Granule)	570,000	
1997	PT Pusri assigned as Holding Company of PIM, PKI, PKC, PKG, Rekind, & ME (PP 28/1997 & PP 34/1998)				
2003	Pusri's Sole Distributor Appointment dismissed by MoIT Decree No. 70/2003.				
2004	MoIT replaced Decree No. 70/2003 with Decree no. 356/2004 (defragmented distribution area for each producer).				

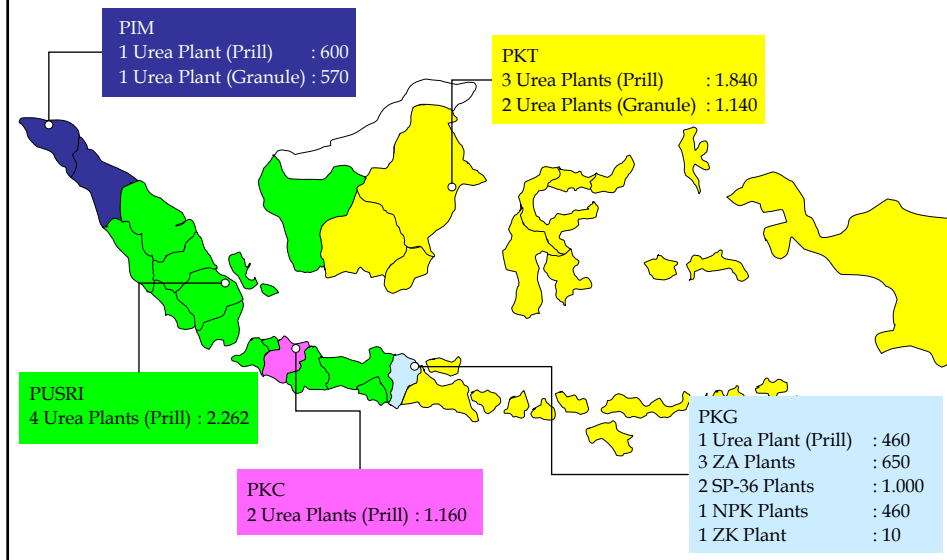


Industry's Most Recent Portrait

Company	Number of Plants & Capacity (ton/year)	Human Resource (man)
PT Pupuk Sriwidjaja (Persero) (PUSRI) 	<ul style="list-style-type: none"> • 4 Ammonia Plants : 1.490.000 • 4 Urea Plants : 2.262.000 	<ul style="list-style-type: none"> • High School or Lower : 2.117 • Diploma/Bachelor : 306/845 • Graduates : 58 • PhD's : 1 Total : 3.327
PT Petrokimia Gresik (PKG) 	<ul style="list-style-type: none"> • 1 Ammonia Plants : 445.000 • 1 Urea Plants : 460.000 • 3 ZA & NPK Plants : 650.000 & 460.000 • 2 SP-36 Plants : 1.000.000 • 1 ZK Plants : 10.000 	<ul style="list-style-type: none"> • High School or Lower : 2.834 • Diploma/Bachelor : 96/497 • Graduates : 77 Total : 3.504
PT Pupuk Kujang (PKC) 	<ul style="list-style-type: none"> • 2 Ammonia Plants : 713.000 • 2 Urea Plants : 1.160.000 	<ul style="list-style-type: none"> • High School or Lower : 753 • Diploma/Bachelor : 63/141 • Graduates : 49 Total : 1.006
PT Pupuk Kalimantan Timur (PKT) 	<ul style="list-style-type: none"> • 4 Ammonia Plants : 1.650.000 • 5 Urea Plants : 2.980.000 	<ul style="list-style-type: none"> • High School or Lower : 1.799 • Diploma/Bachelor : 142/400 • Graduates & PhD's : 67 Total : 2.408
PT Pupuk Iskandar Muda (PIM) 	<ul style="list-style-type: none"> • 2 Ammonia Plants : 726.000 • 2 Urea Plants <ul style="list-style-type: none"> - Granule : 570.000 - Prill : 600.000 	<ul style="list-style-type: none"> • High School or Lower : 849 • Diploma/Bachelor : 71/140 • Graduates : 24 Total : 1.084

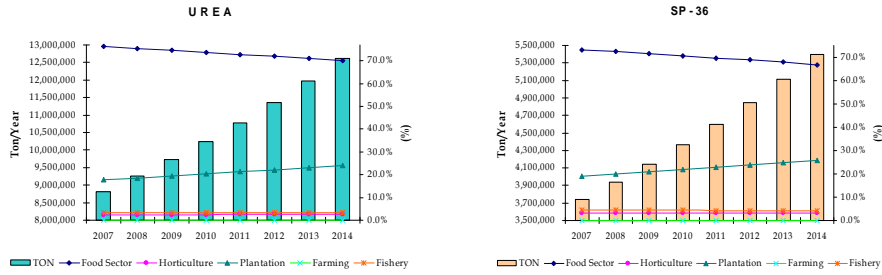


Plants Location, Capacity, & Designated Distr. Area (000 ton)

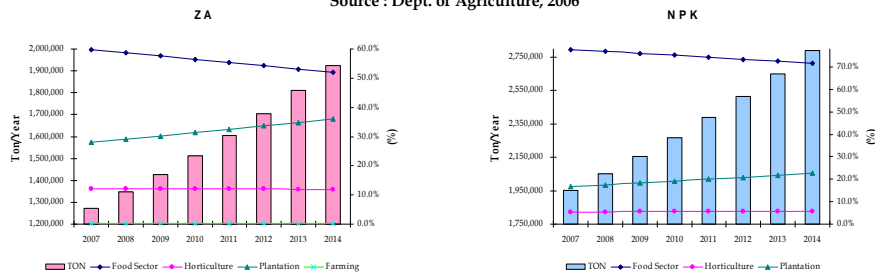




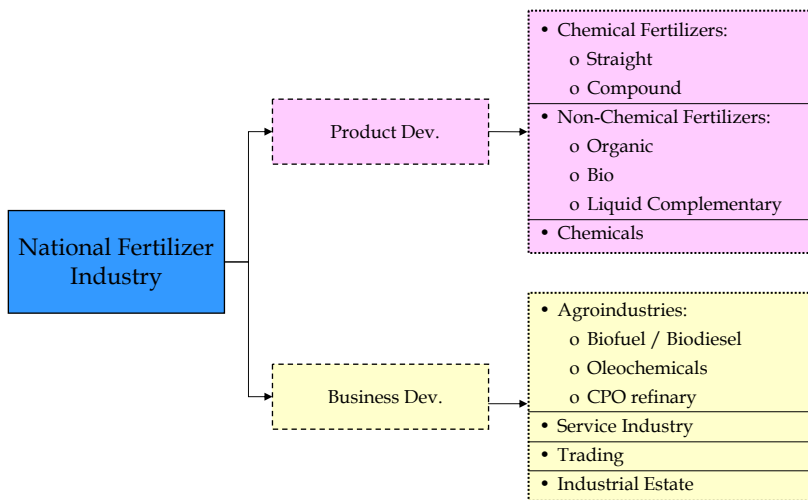
National Consumption Forecast



Source : Dept. of Agriculture, 2006



Future Development





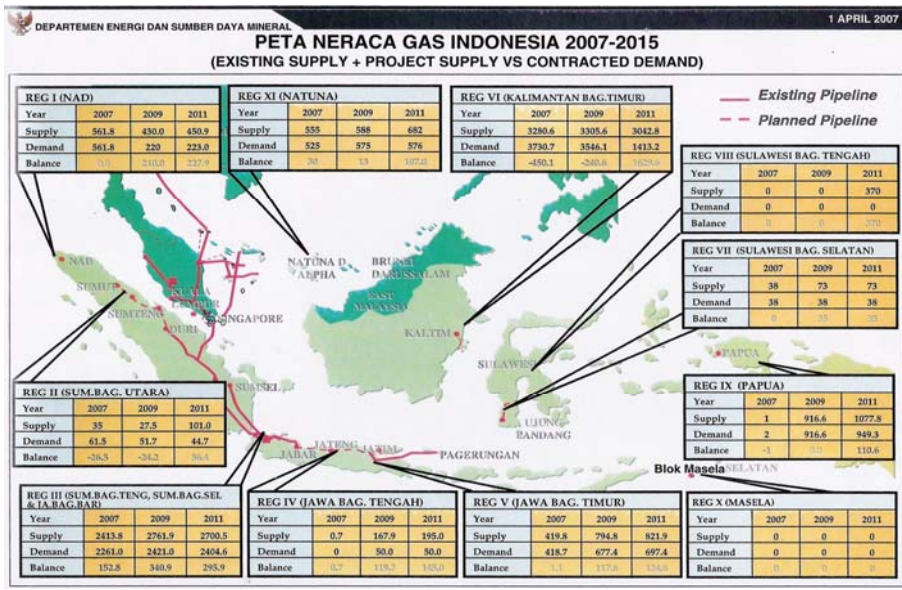
Challenges (Odd Situation)

Natural Gas: Proved reserves	end 2004 TCF	Share of total	LNG Exporter	Market Share
1 Russian Federation	1.694,40	26,7%	Indonesia	18,82%
2 Iran	970,75	15,3%	Malaysia	15,55%
3 Qatar	910,14	14,4%	Algeria	14,47%
4 Saudi Arabia	238,42	3,8%	Qatar	13,52%
5 United Arab Emirates	213,92	3,4%	Trinidad & Tobago	7,86%
6 USA	186,85	2,9%	Nigeria	7,08%
7 Nigeria	176,39	2,8%	Australia	6,84%
8 Algeria	160,44	2,5%	Brunei	5,34%
9 Venezuela	148,93	2,4%	Oman	5,07%
10 Iraq	111,90	1,8%	UAE	4,15%
11 Kazakhstan	105,90	1,7%	USA	0,94%
12 Turkmenistan	102,37	1,6%	Libya	0,35%
13 Indonesia	90,26	1,4%	Total	100,00%
14 Malaysia	86,98	1,4%		
15 Australia	86,92	1,4%		

Source : BP, energy outlook 2005



Challenges (Gas Balance)





Pecking Order

