

China Fertilizer Industry Outlook to 2017 - Strategic Consolidation to Drive the Industry Growth

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Abstracts

The industry research publication titled 'China Fertilizer Industry Outlook to 2017 – Strategic Consolidation to Drive the Industry Growth' presents a comprehensive analysis of market size by volume of fertilizers in China. The report entails the market share analysis and company profiles of major players in the fertilizer industry. The future analysis and segmentation by functionality and distribution channel have also been discussed in each of the sub-segment.

China is the world's most populous country, thus ensuring food supply is the most important challenge for the agriculture industry. Over the years, the country has managed to feed around 21.0% of the population with just about 9.0% of the world's arable land. Hence the application of chemical fertilizers plays a crucial role in ensuring adequate supply of food. The chemical fertilizer industry in China has grown at a moderate growth rate of 2.0% during 2006-2012 with nitrogen fertilizer market as the chief constituting market with a share of 62.5% in 2012 while phosphate and potash fertilizers contributed only 26.4% and 11.2% share in 2012. However, it is the phosphate based fertilizers that have elevated the growth of the chemical fertilizer market in the country during 2006-2012. The consumption of this market has grown from ~ thousand nutrient tons in 2006 to ~ thousand nutrient tons in 2012. The market for potassium fertilizers on the other hand has grown at a CAGR of 1.7% during 2006-2012, reaching a size of ~ thousand tons nutrients in 2012. The fertilizer industry of China is highly fragmented with majority of the firms contributing minute shares. Hubei Yihua Group had the highest production and share in the China fertilizer market which accounted for ~% share with a greater production of urea and other nitrogen fertilizers. Sinofert contributed the second largest share of ~% mainly due to production of potash fertilizers as the firm is the largest player in the potash fertilizer market.

The long term growth potential of the industry remains optimistic of fertilizer market in China as the grain production in China is expected to reach around 50.0 billion kilograms by the year 2020. Additionally, government support to agriculture industry in China would act as another growth promoting factor to fertilizer industry in China. However, the emerging segment in the coming years would be the organic fertilizers with the government of China planning additional farm subsidies, elimination of certain land taxes, land reform initiatives to promote organically grown products.

In the coming five years from 2013-2017, fertilizer demand would continue to grow as a result of increased food demand, lesser arable land and lower crop yields. The consumption of fertilizers in the country would reach ~ thousand tons nutrient in 2017 growing at a CAGR of 5.7% during 2012-2017.

KEY TOPICS COVERED IN THE REPORT

The market size of the China fertilizer market in terms of volume in the last years (2006 - 2012)

China fertilizer market segmentation by nutrients (nitrogen, phosphate, potash)

China fertilizer market segmentation by crop usage (cereals, oil seeds and others)

China nitrogen fertilizer, phosphate fertilizer and potash market size in terms of volume in years 2006-2012.

China nitrogen fertilizer, phosphate fertilizer and potash fertilizer segmentation by products and crop usage.

China zinc micronutrient fertilizer market size in terms of volume

Trends and Developments and Government regulations in the fertilizer market in China

Competitive landscape players operating in fertilizer market of China (Hubei Yihua Group, Kingenta, Anhui Liuguo Chemical Company Ltd, Sinofert Holding Company Ltd, Chemical Blue Company Ltd and others)

Future projections and macro economic factors of China fertilizer industry

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