

Vietnam Fertilizer Industry Outlook to 2017 - Government Initiatives to Enhance NPK Complex Fertilizer Growth

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Abstracts

The industry research publication titled 'Vietnam Fertilizer Industry Outlook to 2017 – Government Initiatives to Enhance NPK Complex Fertilizer Growth' presents a comprehensive analysis of market size by volume of fertilizers in Vietnam. 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.

Vietnam is an agrarian economy which is set apart with its small land base and a large population base. Faced with the problem of high population, food security is a major reason of concern for the government of the country. The fertilizer industry plays a crucial role in fulfilling the food needs of the population. The overall consumption of fertilizers has showcased a growth of 3.4% during 2006-2012 growing from ~ thousand tons nutrients in 2006 to ~ thousand tons nutrients in 2012. The imports played a significant role in the fertilizer industry of the country growing at a CAGR of 1.6% during 2006-2011 as a substantial amount of fertilizers are imported in the country. In terms of nutrients nitrogen fertilizers occupied the highest share of ~% in 2012. The consumption of second and the third largest segment namely phosphate and potash fertilizers reached ~ thousand tons nutrients and ~ thousand tons nutrients respectively in 2012. The government has started to support greater consumption phosphate and potash fertilizers with their share reaching ~% and 19.5% respectively in 2012. The domestic fertilizer supply of nitrogen and phosphate fertilizers in Vietnam is concentrated in the hands of two giants namely the Petrovietnam group (PVN) and Vietnam national chemical group (Vinachem). In the nitrogen fertilizer segment, Petrovietnam had a share of ~% while Vietnam National chemical group contributed ~% of the share in 2012. The most widely used nitrogen fertilizers include products such as urea and

ammonium phosphate, phosphate fertilizers such as fused magnesium phosphate and superphosphate and complex fertilizers such as NPK. The fertilizer sector of Vietnam is closely monitored and tightly regulated by the government policies. Subsidization of raw materials is one of key important factors driving this market. For instance, Cau Mau fertilizer plant and DPM benefit from the low natural gas price which is available to them at as much as 40.0% lower price as compared to the price at which natural gas is provided to the industrial users. All these factors have significantly driven the consumption of fertilizers in the country.

The fertilizer market of Vietnam is estimated to reach about ~ thousand tons nutrients in 2017 growing at a CAGR of 4.3% during 2012-2017. The primary industry of the country would continue to play a crucial role in the development of economy of Vietnam with the GDP from agriculture, fishing and forestry expected to reach USD 123,371.9 million in 2017. Hence, the agriculture industry would continue to be one of the main areas of focus of the Vietnamese government thereby driving the demand for fertilizers in the country. In the coming years, growth in the fertilizer industry of Vietnam would be driven by potash fertilizers particularly in the NPK segment.

KEY TOPICS COVERED IN THE REPORT

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

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

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

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

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

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

Competitive landscape players operating in fertilizer market of Vietnam (Vietnam National Chemical Group, Petro Vietnam Fertilizer and Chemical Group, Petro

Vietnam cau Mau Fertilizer Company and others)

Future projections and macro economic factors of Vietnam fertilizer industry

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