

China Fertilizer Market Review & Outlook 2006/2007

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Abstracts

Background

China maintained a rapid economic growth in 2006 under the national macro-control policy, the first year of the 11th Five-Year Period (2006~2010) of the national economic development. A series of policies for economic development, including objectives, key points of growth and directions of structural readjustment, have been worked out.

The 11th Five-Year Plan for the Chinese Economic And Social Development, promulgated in March, 2006, requires that per unit GDP energy consumption and pollution discharge be reduced by 20% and 10% in five years against the backdrop of an expected annual 7.5% GDP growth. This poses a new challenge to the fertilizer industry because it is one of the industries with high energy consumption and high pollution discharge. The policy is expected to bring about a new round of technical innovation, distribution of production and product-mix readjustment in the fertilizer industry. How will the new round of restructuring be carried out?

The 11th Five-Year Plan for National Agricultural & Rural Economic Development, promulgated in Aug., 2006, sets up a goal of annual 0.65% increase in comprehensive grain productive capacity in five years under the condition of annual 0.18% decrease in planted grain acreage. Then how will the fertilizer industry step up fertilizer supply, improve its product-mix, improve fertilizing technology and raise fertilizer utilization to ensure the accomplishment of grain production goals?

The 11th Five-Year Plan for the Fertilizer Industry, promulgated in Oct., 2006, puts forward a fertilizer productive capacity of 63.5 million MT and a production of 60 million MT a year by 2010 in order to guarantee fertilizer supply. The specific goals of nitrogen, phosphorus and potassium production are 42 million MT, 15 million MT and 3 million MT respectively. Domestic fertilizer self-sufficiency should reach 90%, that is, basic self-

sufficiency of nitrogen and phosphorus supply and 30% of potassium supply. How will the fertilizer industry readjust its distribution of production and product-mix and what steps will it take in technical innovation to attain the industry's development goals?

The conflict between the government's policy to practice macro-control and the policy of increasing farmers' income and the conflict between fertilizer price growth and government's control remained unsettled in 2006. Farmers' and fertilizer producers' complaints led to a government decision to lift fertilizer price control, withdraw preference policies for fertilizer producers and give direct cash subsidy to farmers from 2007 on. But fertilizer production cost keeps increasing on account of the reform of coal, power and natural gas price toward market economy. Owing to this, there was a tendency of declining profit margin in the fertilizer industry in late 2006. Therefore, how the government reforms its policies will have great impact on fertilizer production and fertilizer market trend in 2007.

On the basis of thorough review and analysis of government's fertilizer policies and market trend in 2006, taking into account of national economic move and overall policy reform, BOABC will make an in-depth analysis of the problems facing the fertilizer market in 2007 and draw reasonable conclusions, so as to provide a reference to people concerned about China's fertilizer market.

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