

Investment Research Report on China's Urea Industry in 2011-2020

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Abstracts

Background

Since 2010, urea industry has shown complex and volatile situation. On the one hand, policy environment became much severer, many preferential policies were cancelled in China. The supply of raw materials such as coal and natural gas has been in tight, urea output saw rare decreases year on year for a long time, lots of enterprises shut down and suffered losses, at the same time, investment fell down greatly in urea industry, price fluctuation was aggravated further.

On the other hand, China will see growing population, rapid economic growth and improving household consumption level in next ten years, which brings about great pressure on production increase of grain and other farm produces. However, under the circumstance that it is hard to increase agricultural acreage effectively and agricultural labor are reducing rapidly, applying more fertilizer is one of principal means to increase production. As one of the most important fertilizers, urea has a great potential to see consumption growth. Its major consumption way will shift to indirect fertilizer (NPK and BB) from direct fertilizer; the proportion of industrial consumption (artificial board and melamine) of urea will increase year by year.

Under the influence of above favorable and unfavorable factors, urea industry is moving from the fast developing growth stage to mature stage, industrial integration has become the mainstream for the development of urea industry. Though overall investment scale is shrinking, large enterprises in the industry are still expanding investment to build new manufacturing equipments or carrying out large scale acquisition.

As urea plays a core role in fertilizer industry, the fluctuation of urea industry will bring about profound influence on whole fertilizer industry, grain industry and the trend of whole agricultural industry. The report makes forward-looking analysis on the development trend of urea industry in 2011-2020 based on the information and data from the State Statistics Bureau, the General Administration of Customs, CNCIC, MOA, nitrogen fertilizer organization and BOABC. The report mainly includes following questions:

1. How the integration and layout of urea industry will change in China?
2. Variation trend of the demand scale and demand structure of urea in China.
3. How about the supply of raw materials of urea in China?
4. Competitiveness analysis of urea enterprises.
5. Variation trend of the circulation field and logistics of urea in China
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