

# Special Research Report on China's Phosphate Fertilizer Industry

<https://marketpublishers.com/r/S424BBBF039EN.html>

Date: July 2012

Pages: 90

Price: US\$ 6,000.00 (Single User License)

ID: S424BBBF039EN

## Abstracts

### Abstract

this report analyzes the historical trend of phosphate fertilizer industry and thus conducts an prospective analysis of the development trend of China's phosphate fertilizer industry in 2012-2015, focusing on the industry policy, supply-demand relation, raw material supply, industry profit as well as the changes in its growth, logistics, and sales network, with the purpose of providing data service and reference for industry insiders and investors.

### Research Background

Since 2008, China's phosphate fertilizer market has undergone violent volatility in terms of price trend, raw material supply, export and profit, and there is an increasingly obvious trend of industrial integration in the phosphate fertilizer market. After 2012, major factors that limited the development of phosphate fertilizer industry include the tight macro-economy, surplus in supply, higher cost and restricted export. On the other hand, industry access policy for the high-analysis compound phosphate fertilizer is about to be issued. When the industry expansion is basically suspended, the integration based on resource and guided by technology within the industry is about to be on progress.

Due to the importance of phosphate fertilizer to agricultural production, in a long time in the future, the development of phosphate fertilizer industry will continue to play important role in the overall agricultural field. The development of phosphate fertilizer industry in the future 3-5 years will be the focus of concern of corresponding practitioners and investors.

Based on the data and information from National Bureau of Statistics, General Administration of Customs, China National Chemical Information Center, as well as each industry associations of the fertilizer industry, this report analyzes the historical trend of phosphate fertilizer industry and thus conducts an prospective analysis of the development trend of China's phosphate fertilizer industry in 2012-2015, focusing on the industry policy, supply-demand relation, raw material supply, industry profit as well as the changes in its growth, logistics, and sales network, with the purpose of providing data service and reference for industry insiders and investors.

The phosphate fertilizer products involved in this report include single phosphate fertilizer (calcium superphosphate, triple superphosphate, calcium-magnesium phosphate, etc.) and compound phosphate fertilizer (diammonium phosphate (DAP), mono-ammonium phosphate (MAP) and NPK fertilizer, etc.).

## Contents

### RESEARCH BACKGROUND

### REPORT CONTENT

## **I ANALYSIS OF CHINA'S PHOSPHATE FERTILIZER INDUSTRY POLICY ENVIRONMENT**

- 1.1 China's Phosphate Fertilizer Industry Planning and Investment Policy
  - 1.1.1 China's Phosphate Fertilizer Industry Planning
  - 1.1.2 Phosphate Fertilizer Industry Investment Policy
  - 1.1.3 Phosphate Fertilizer Industry Access Policy
- 1.2 China's Sulfur and Phosphate Resources Policy
  - 1.2.1 Phosphate Resource Policy
  - 1.2.2 Sulfur Resource Policy
- 1.3 China's Phosphate Fertilizer Import & Export Policy
  - 1.3.1 Import Quota and VAT Policy
  - 1.3.2 Export Duty Policy
- 1.4 China's Phosphate Fertilizer Price Supervision Policy
- 1.5 China's Phosphate Fertilizer Industry Taxation and Subsidy Policy
  - 1.5.1 Preferential Policy for Phosphate Fertilizer VAT
  - 1.5.2 Subsidy Policy for Phosphate Fertilizer Industry
  - 1.5.3 Other Preferential Policy for Phosphate Fertilizer Industry
- 1.6 Analysis of China's Phosphate Fertilizer Transportation Policy
- 1.7 Restriction of China's Environmental Protection Policy on Phosphate
- 1.8 Outlook of Phosphate Fertilizer Industry Policy in 2012-2015

## **II ANALYSIS AND ESTIMATION OF CHINA'S PHOSPHATE FERTILIZER MARKET DEMAND AND SUPPLY**

- 2.1 Analysis of China's Phosphate Fertilizer Demand Growth Potential
    - 2.1.1 Analysis of China's Agricultural Phosphate Fertilizer Demand Growth Potential
      - 2.1.1.1 Major Factors Affecting China's Agricultural Phosphate Fertilizer Demand
- Figure 2.1, China's Total Plant Area of Crop
- 2.1.1.2 Impact of Agricultural Products Profit Changes on Phosphate Fertilizer Consumption
- Figure 2.2, Returns from Major Crops in China
- Figure 2.3 China P-Fertilizer Consumption on Agriculture

2.1.1.3 Impact of Agricultural Subsidy on Phosphate Fertilizer Consumption	
2.1.2 Agricultural Demand of Major Phosphate Fertilizer Products	
2.1.2.1 Agricultural Demand of Calcium Superphosphate	
Figure2.4, China SSP Consumption, 1996-2015	
Figure2.5 SSP Cost of Major Crops	
2.1.2.2 Agricultural Demand of Diammonium Phosphate	
Figure2.6 China DAP Consumption, 1992-2015	
Figure2.7 DAP Cost of Major Crops	
2.1.2.3 Agricultural Demand of Mono-ammonium Phosphate (MAP)	
Figure2.8 China MAP Consumption, 2000-2015	
Figure2.9 MAP Cost of Major Crops	
2.1.2.4 Agricultural Demand of Compound Fertilizer	
Figure2.10, China NPK Consumption, 1995-2015	
Figure2.11 NPK Cost of Major Crops (1)	
Figure2.12 NPK Cost of Major Crops (2)	
2.1.3 Outlook of China's Phosphate Fertilizer Export	
2.1.3.1 Estimation of International Phosphate Fertilizer Market Demand	
Figure2.13 International Price of DAP, 2002-2012	
Figure2.14 International Price of MAP, 2002-2012	
Figure2.15 International Price of NPK, 2006-2012	
2.1.3.2 Outlook of China's Phosphate Fertilizer Export	
Figure2.16, China P-Fertilizer Exports	
Figure2.17, China P-Fertilizer Exports by product	
2.1.4 Outlook of China's Phosphate Fertilizer Demand Growth Potential in 2012-2015	
Figure2.18, China P-Fertilizer Consumption, 1990-2015	
2.2 Analysis of the Supply Capacity of Phosphate Fertilizer Industry	
2.2.1 Analysis of Phosphate Fertilizer Production Capacity Growth Potential	
Figure2.19, China P-Fertilizer Production, 1990-2015	
2.2.2 Estimation of Phosphate Fertilizer Production Distribution Changes	
2.2.3 Outlook of Phosphate Fertilizer Import	
Figure2.20, China P-Fertilizer Imports	
2.2.4 Outlook of Phosphate Fertilizer Supply Capacity Growth Potential	
2.3 Estimation of Phosphate Fertilizer Supply-Demand in 2012-2015	
Table2.1, balance sheet of P-Fertilizer in China	

### **III ANALYSIS OF MAJOR RAW MATERIAL AND FUEL SUPPLY IN CHINA'S PHOSPHATE FERTILIZER INDUSTRY**

#### **3.1 Analysis of Raw Material Supply in China's Phosphate Fertilizer Industry**

### 3.1.1 Analysis of Phosphate Rock Supply to Phosphate Fertilizer Industry

#### 3.1.1.1 Estimation of Phosphate Rock Supply Prospect

Figure3.1, China phosphate rock Production

#### 3.1.1.2 Regional Distribution of Phosphate Rock and Transportation Condition Assessment

### 3.1.2 Analysis of Sulfur Supply to Phosphate Fertilizer Industry

#### 3.1.2.1 Estimation of Phosphate Fertilizer Sulfur Supply Prospect

Figure3.2, China Sulphur Capacity and Production, 2000-2015

#### 3.1.2.2 Analysis of China's Sulfur Import Prospect

Figure3.3, China's Sulfur Import Volume and Import Price, 1996-2011

#### 3.1.2.3 Analysis of China's Sulfur Production Capacity Growth Potential

### 3.1.3 Analysis of Other Raw Material Supply to China's Phosphate Fertilizer Industry

## 3.2 China's Power Supply and Other Fuel Supply Condition

## 3.3 Outlook of Raw Material Supply and Fuel Supply to China's Phosphate Fertilizer Industry in 2012-2015

## **IV ANALYSIS OF COST AND PROFIT IN CHINA'S PHOSPHATE FERTILIZER INDUSTRY**

### 4.1 Analysis of China's Phosphate Fertilizer Production Cost

#### 4.1.1 Analysis of China's Calcium Superphosphate Production Cost Changes in 2009-2012

Table4.1, Production Cost of SSP

#### 4.1.2 Analysis of China's Diammonium Phosphate Production Cost Changes in 2009-2012 (DAP)

Figure4.1 Production Cost & Profit of DAP

Table4.2, Production Cost of DAP

#### 4.1.3 Analysis of China's Mono-ammonium Phosphate Production Cost Changes in 2009-2012 (MAP)

Figure4.2 Production Cost & Profit of MAP

Table4.3, Production Cost of MAP

#### 4.1.4 Analysis of China's Compound Fertilizer Production Cost Changes in 2009-2012

Table4.4, Production Cost of NPK

### 4.2 Analysis of China's Phosphate Fertilizer Industry Profit Margin

#### 4.2.1 Analysis of China's Single Phosphate Fertilizer Industry Profit Margin

Figure4.3, Profit Margin of Single Phosphate Fertilizer Manufacture

#### 4.2.2 Analysis of China's Compound Phosphate Fertilizer Industry Profit Margin

Figure4.4, Profit Margin of Compound Phosphate Fertilizer Manufacture

### 4.3 Analysis of China's Phosphate Fertilizer Industry Competitiveness

- 4.3.1 Analysis of China's Phosphate Fertilizer Industry Profitability
- Table 4.5 The Cost & Expense of P-Fertilizer Industry 2003-2011
- Table 4.6 ROE of P-Fertilizer Industry, 2003-2011
- Table 4.7 Percentage of Loss-incurring Enterprises of P-Fertilizer Industry, 2003-2011
- 4.3.2 Analysis of China's Phosphate Fertilizer Industry Development Capability
- Table 4.8 The Development Ability of P-Fertilizer Industry in China 2003-2011
- 4.3.3 Analysis of China's Phosphate Fertilizer Industry Anti-Risk Capability
- 4.4 Analysis of the Competitiveness of China's Compound Phosphate Fertilizer Enterprises in Different Regions
- 4.5 Analysis of the Competitiveness of China's Compound Phosphate Fertilizer Urea Enterprises of Different Scale
- Table 4.9 China's P-Fertilizer Manufacture Concentration Ratio
- 4.6 Comparative Analysis of the Competitiveness of China's Compound Phosphate Fertilizer Enterprises and Single Phosphate Fertilizer Enterprises
- 4.7 Comprehensive Evaluation of China's Phosphate Fertilizer Industry Competitiveness and Its Development Trend in 2012-2015

## **V ANALYSIS OF CHINA'S PHOSPHATE FERTILIZER INDUSTRY LOGISTICS AND SALES NETWORK**

- 5.1 Regional Distribution of China's Major Phosphate Fertilizer Production Enterprises
- 5.2 Assessment of China's Phosphate Fertilizer Transportation
  - 5.2.1 Transportation of Phosphate Fertilizer by Railway
  - 5.2.2 Transportation of Phosphate Fertilizer by Highway
- 5.3 China's Phosphate Fertilizer Industry Sales Network Building
- 5.4 Comprehensive Evaluation and Outlook of China's Phosphate Fertilizer Industry Logistics and Sales Network
  - 5.4.1 China's Phosphate Fertilizer Logistics Development Trend and Estimation in 2012-2015
  - 5.4.2 China's Phosphate Fertilizer Sales Network Development Trend and Estimation in 2012-2015

## **VI ANALYSIS OF PHOSPHATE FERTILIZER MARKET BY REGION**

- 6.1 Northeast China (Heilongjiang, Jilin and Liaoning)
  - 6.1.1 Analysis of Supply Capacity in 2009-2012
  - Table 6.1, P-fertilizer Production of Northeast China
  - 6.1.2 Analysis of Demand in 2009-2012
  - Table 6.2, P-fertilizer Demand of Northeast China

### 6.1.3 Price Trend in 2009-2012

Figure6.1 P-Fertilizer Price in Northeast China

### 6.1.4 Development Trend in 2012-2015

## 6.2 North China (Hebei, Shandong and Shanxi)

### 6.2.1 Analysis of Supply Capacity in 2009-2012

Table6.3, P-fertilizer Production of North China

### 6.2.2 Analysis of Demand in 2009-2012

Table6.4, P-fertilizer Demand of North China

### 6.2.3 Price Trend in 2009-2012

Figure6.2 P-Fertilizer Price in North China

### 6.2.4 Development Trend in 2012-2015

## 6.3 Central China (Henan, Hubei and Hunan)

### 6.3.1 Analysis of Supply Capacity in 2009-2012

Table6.5, P-fertilizer Production of Central China

### 6.3.2 Analysis of Demand in 2009-2012

Table6.6, P-fertilizer Demand of Central China

### 6.3.3 Price Trend in 2009-2012

Figure6.3 P-Fertilizer Price in Central China

### 6.3.4 Development Trend in 2012-2015

## 6.4 East China (Anhui, Jiangsu, Jiangxi and Zhejiang)

### 6.4.1 Analysis of Supply Capacity in 2009-2012

Table6.7, P-fertilizer Production of East China

### 6.4.2 Analysis of Demand in 2009-2012

Table6.8, P-fertilizer Demand of East China

### 6.4.3 Price Trend in 2009-2012

Figure6.4 P-Fertilizer Price in East China

### 6.4.4 Development Trend in 2012-2015

## 6.5 South China (Guangdong, Guangxi and Fujian)

### 6.5.1 Analysis of Supply Capacity in 2009-2012

Table6.9, P-fertilizer Production of South China

### 6.5.2 Analysis of Demand in 2009-2012

Table6.10, P-fertilizer Demand of South China

### 6.5.3 Price Trend in 2009-2012

Figure6.5 P-Fertilizer Price in South China

### 6.5.4 Development Trend in 2012-2015

## 6.6 Southwest China (Sichuan, Guizhou and Yunnan)

### 6.6.1 Analysis of Supply Capacity in 2009-2012

Table6.11, P-fertilizer Production of Southwest China

### 6.6.2 Analysis of Demand in 2009-2012

Table6.12, P-fertilizer Demand of Southwest China

6.6.3 Price Trend in 2009-2012

Figure6.6 P-Fertilizer Price in Southwest China

6.6.4 Development Trend in 2012-2015

6.7 Northwest China (Shaanxi, Gansu, Ningxia and Xinjiang)

6.7.1 Analysis of Supply Capacity in 2009-2012

Table6.13, P-fertilizer Production of Northwest China

6.7.2 Analysis of Demand in 2009-2012

Table6.14, P-fertilizer Demand of Northwest China

6.7.3 Price Trend in 2009-2012

Figure6.7 P-Fertilizer Price in Northwest China

6.7.4 Development Trend in 2012-2015

## **VII ANALYSIS OF KEY ENTERPRISES**

7.1 Yuntianhua Group Co., Ltd.

7.1.1 Company Profile

7.1.2 Phosphate Fertilizer Production Capacity and Output in 2009-2012

Table7.1, P-fertilizer Production of Yuntianhua Group Co.,Ltd.

7.1.3 Analysis of Enterprises Profitability and Operation Capability

Table7.2 The Economic Indicators of Yunnan Yuntianhua Co., Ltd

7.1.4 Outlook of Enterprises Development Trend

7.2 Luxi Chemical Group Co., Ltd.

7.2.1 Company Profile

7.2.2 Phosphate Fertilizer Production Capacity and Output in 2009-2012

Table7.3 P-fertilizer Production of Shandong Luxi Chemical Co.,Ltd.

7.2.3 Analysis of Enterprises Profitability and Operation Capability

Table7.4 The Economic Indicators of Shandong Luxi Chemical Co.,Ltd

7.2.4 Outlook of Enterprises Development Trend

7.3 Hubei Yihua Chemical Industry Co., Ltd.

7.3.1 Company Profile

7.3.2 Phosphate Fertilizer Production Capacity and Output in 2009-2012

Table7.5, P-fertilizer Production of Hubei Yihua Chemical Co., Ltd.

7.3.3 Analysis of Enterprises Profitability and Operation Capability

Table7.6 The Economic Indicators of Hubei Yihua Chemical Industry Co., Ltd.

7.3.4 Outlook of Enterprises Development Trend

7.4 Anhui Liuguo Chemical Industry Stock Co., Ltd.

7.4.1 Company Profile

7.4.2 Phosphate Fertilizer Production Capacity and Output in 2009-2012

Table7.7, P-fertilizer Production of Anhui Liuguo Chemical Co., Ltd.

7.4.3 Analysis of Enterprises Profitability and Operation Capability

Table7.8 The Economic Indicators of Anhui Liuguo Chemical Co., Ltd.

7.4.4 Outlook of Enterprises Development Trend

7.5 Wengfu (Group) Co., Ltd.

7.5.1 Company Profile

7.5.2 Phosphate Fertilizer Production Capacity and Output in 2009-2012

Table7.9, P-fertilizer Production of Wengfu Group

7.5.3 Analysis of Enterprises Profitability and Operation Capability

Table7.10 The Economic Indicators of Wengfu Group

7.5.4 Outlook of Enterprises Development Trend

## **APPENDIX**

Policy (2011-2012)

Investment & Construction

Imports & Exports

Table1 China's NPK Imports by Country Original, 2007-2011

Table2, China's NPK Exports by Destination Country, 2007-2011

Table3, NPK Imports by Customs, 2007-2011

Table4, China's NPK Exports by Customs, 2007-2011

Table5, NPK Imports by Provinces, 2007-2011

Table6, China's DAP Imports by Country Original, 2007-2011

Table44, China's DAP Exports by Country Destination, 2007-2011

Table7, DAP Imports by Customs, 2007-2011

Table8, China's DAP Exports by Customs, 2007-2011

Table9, China's Import by Major Chemical Fertilizer Related Products, 2007-2011

Table10, China's Sulfur Import by Country Original, 2007-2011

Table11, China's Sulfur Import by Customs, 2007-2011

Table12, China's Exports by Major Chemical Fertilizer Related Products, 2007-2011

Table13, China Phosphorite Exports by Destination Country, 2007-2011

Table14, China Phosphorite Exports by Customs, 2007-2011

## I would like to order

Product name: Special Research Report on China's Phosphate Fertilizer Industry

Product link: <https://marketpublishers.com/r/S424BBBF039EN.html>

Price: US\$ 6,000.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/S424BBBF039EN.html>

To pay by Wire Transfer, please, fill in your contact details in the form below:

First name:  
Last name:  
Email:  
Company:  
Address:  
City:  
Zip code:  
Country:  
Tel:  
Fax:  
Your message:

**\*\*All fields are required**

Customer signature \_\_\_\_\_

Please, note that by ordering from marketpublishers.com you are agreeing to our Terms & Conditions at <https://marketpublishers.com/docs/terms.html>

To place an order via fax simply print this form, fill in the information below and fax the completed form to +44 20 7900 3970