

# Chemical Fertilizer Industry Overview in China, 2011-2020

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## Abstracts

### Description

Chemical fertilizers are chemical products with at least one essential nutrient element for growing crops. The one with only one indicated element of nutrients is known as single fertilizers such as nitrogenous fertilizers, phosphoric fertilizers, potash fertilizers, constant minor element fertilizers as well as microelement fertilizers. The one with at least two indicated elements of nitrogen, phosphorus and potassium is known as compound or mixed fertilizers. The upstream of the fertilizer industry includes natural gas, coals, petroleum, sylvine and rock phosphates.

According to CRI, China mainly manufactures nitrogenous fertilizers with about 70% of the total chemical fertilizer output, of which about 60% are urea.

China is a leading manufacturer and consumer of chemical fertilizers with an output volume of 76.2736 million tons in 2015, ranking the first in the production capacity, output volume and consumption of nitrogenous and phosphoric fertilizers with a large export volume in the world. Meanwhile, the output volume of potash fertilizers ranks the fourth with a rapidly increasing self-support degree.

Many preferential policies are issued by Chinese government for chemical fertilizer enterprises to guarantee the food security and maintain the stability of the market, including implementing the price preference in electricity, natural gas and transportation, returning the value added tax of urea, exempting that of heavy calcium carbonates, monoammonium phosphates and diammonium orthophosphates as well as ensuring the supply of coals, electricity, oil and gas for production.

According to CRI research, chemical fertilizer manufacturers reached over 1,000 in number up to the end of 2015 while the product homogeneity level was high. The total sales revenue of top 10 enterprises in this industry accounts for less than 50% of the overall market. Major concerns of consumers towards chemical fertilizers are prices, brands and use experiences. Therefore, key factors for the competitiveness of chemical fertilizer enterprises are better reputation and lower prices.

Problems such as overcapacity and overuse are confronted with the chemical fertilizer industry, which Chinese government issued a series of policies and regulations to curb. Chinese government regulates the rising prices of chemical fertilizers as major costs in agricultural production through macro-control measures. The production costs are expected to increase for the progressively weakening bargaining ability of chemical fertilizer manufacturers towards coals and natural gas as well as the depletion of high grade phosphate ore resources. Meanwhile, large-scale enterprises lower prices to expand the sales volume in mergers and acquisitions with their scale advantages, which leads to the dilemma of certain small and medium sized enterprises. It is estimated that the market concentration rate of the chemical fertilizer industry will increase in China in the next few years.

The import volume of grains exceeded 120 million tons with an increase of 17.0% YOY, among which that of soybeans was 81.69 million tons with an increase of 14.4% in 2015. The first three substitutes for feeding corns except soybeans are barley, sorghum and cassava with an annual import volume of 10.7 million tons, 10.69 million tons and 9.37 million tons respectively. The annual import volume of grains exceeds domestic output volume by 10%, which leads to a serious food security problem in China. Therefore, Chinese government is expected to implement policies conducive to the development of the chemical fertilizer industry in the next few years.

Through this report, the readers can acquire the following information:

Definition and Classification of Chemical Fertilizers

Research Methods of the Report

Analysis on Supply and Demand in Chemical Fertilizer Industry in China

Analysis on Export of Chemical Fertilizers in China

Competition in Chemical Fertilizer Market in China

Analysis on Top5 Manufacturers in Chemical Fertilizer Industry in China

Development Opportunities and Driving Forces Faced by Chemical Fertilizer Industry in China

Risks and Challenges in the Development of Chemical Fertilizer Industry in China

Price Trend of Major Raw Materials and Products of Chemical Fertilizers in China, 2013-2015

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