

Investigation Report of China's Chemical Fertilizer Industry in Financial Crisis, 2009

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Abstracts

In 2008, the total yields of Chinese chemical fertilizers were 58.6755 million tons, increasing 1.4%. The total yields of Nitrogen Fertilizer were 43.3118 million tons, rising 2.7% in 2007 and the total yields of potash fertilizer were 2.7748 million tons, increased by 3.4% in 2007.

In 2008, the domestic application rates of Nitrogen, phosphate and potash fertilizers were 1:0.33:0.22. The production structure and application structure were seriously desperate, surplus in Nitrogen fertilizer and shortage in potash fertilizer. The adjustment of Chinese agricultural structure helped the growth of using fertilizers and the change of demand structure. At present, Chinese agriculture structure adjusts towards decreasing grain-sown area and increasing economic grain- sown area, such as (vegetables and fruit trees etc). Usually, economic grains need 1.2 to 2.0 times fertilizers than normal grains. Therefore, fertilizers per unit and the total demands of fertilizers increase. Meanwhile, the adjustment of Chinese agricultural planting structure will add the demands for phosphorus potassium, compound fertilizers and specialty fertilizers.

From the aspect of yield capacity in Chinese chemical fertilizer industry, nitrogen fertilizers, phosphoric fertilizers and pesticides can meet the needs and obviously surplus besides the exports of potash fertilizer. In 2008, China totally exported chemical fertilizers 9027 million tons, a YOY decline of 30.7%, valued 4.32 billion USD, increased by 16.6%. In the same year, China imported chemical fertilizers 6.185 million tons, declining 47%. The net export volumes of chemical fertilizers were 3.085 million tons in a year, realizing the net country of chemical fertilizers since 2007. The main export destinations of chemical fertilizers were Southeast Asia, India and America. In 2008, the respective export volumes to the three countries were 2.976 million tons, 2.082 million tons and 0.624 million tons, accounting for 61.3% of the total volumes. The main export

type of chemical fertilizers was carbamide. In 2008, the total export volumes of Chinese carbamide were 4.36 million tons, accounting for 47% of the total volumes.

In the first half of 2008, the price of Chinese chemical fertilizer increased sharply in the process of international increase of resource prices. However, the prices of crude oil and sulfur declined because of international financial crisis. Subsequently, the price of chemical decreased. The price of diammonium phosphate and monoammonium phosphate reduced from 5000 Yuan (710 USD) per ton and 4000 Yuan (570 USD) per ton to 3000 Yuan (430 USD) per ton and 2000 Yuan (286 USD) per ton respectively. The big fluctuations in price seriously influenced Chinese chemical fertilizer industry.

At the moment, the problems, such as difficult selling, high price for raw materials, high costs, large storage and difficulties of capital turnover, exist in Chinese chemical fertilizer industry. By the end of 2008, the carbamide storage volumes reached 2.35 million tons, rising by 160%. The diammonium phosphate storage volumes reached 1.25 million tons, increasing 230%. By the end of 2008, the number of carbamide manufactures closed down passed forty and diammonium phosphate manufacturers closed was over 100. Less than 50% of phosphate fertilizer manufacturers started their productions.

It is predicted that the yield capacity of Chinese carbamide and diammonium phosphate are 61 million tons and 13 million tons respectively, with a surplus yield capacity of 10 million tons and 6 million tons respectively from present run.

The author of this report paid attention to Chinese chemical fertilizer industry and the manufacturers for long time and cite abundant second-hand information.

Readers can obtain more following information:

- Production and consumption of Chinese chemical fertilizer industry
- Development of sub-sectors in Chinese chemical fertilizer industry
- Imports and exports of Chinese chemical fertilizer industry
- Trends of market demand changes in Chinese chemical fertilizer industry
- Price trends of Chinese chemical fertilizer industry
- Factors affecting the development of Chinese chemical fertilizer industry
- Competitions of Chinese chemical fertilizer industry
- Important manufacturers and their operations of Chinese chemical fertilizer industry
- Influences of international financial crisis on Chinese chemical fertilizer industry
- Development trends of Chinese chemical fertilizer industry

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