

Research Report on Chinese Chemical Fertilizer Industry, 2008-2009

<https://marketpublishers.com/r/R2451531EF8EN.html>

Date: September 2009

Pages: 40

Price: US\$ 1,800.00 (Single User License)

ID: R2451531EF8EN

Abstracts

Chinese chemical fertilizer industry consists of the manufacturing of nitrogen fertilizer, phosphate fertilizer, potash fertilizer and compound fertilizer.

In 2009 H1, production of Chinese chemical fertilizers totaled 32.504 million tons, rising by 9.50% YOY. Productions of Shandong, Hubei, Henan, Sichuan and Hunan ranked among the Top 5, whose aggregate production accounted for 45.86% of that in China. Inner Mongolia, Hubei, Hunan, Anhui and Guizhou achieved the highest YOY growth rates.

In 2009 H1, production of Chinese nitrogen fertilizers reached 24.216 million tons. Productions of Shandong, Henan, Hubei, Shanxi and Sichuan ranked among the Top 5, whose aggregate production took up 48.26% of that in China.

In 2009 H1, production of Chinese phosphate fertilizers reached 6.733 million tons. Productions of Hubei, Yunnan, Shandong, Guizhou and Anhui ranked among the Top 5, whose total production accounted for 69.25% of that in China.

In 2009 H1, Chinese potash fertilizers totaled 1.549 million tons. Productions of Qinghai, Xinjiang, Henan, Shandong and Inner Mongolia ranked among the Top 5, whose aggregate production took up 95.26% of that in China.

From January to May of 2009, sales revenue of Chinese chemical fertilizer industry totaled RMB 175.059 billion, growing by 0.74% YOY. The aggregate profit reached RMB 6.931 billion, reducing by RMB 7.711 billion YOY. Return on sales (ROS) was 3.96%, falling by 4.15% YOY. Loss of unprofitable enterprises reached RMB 3.891 billion, increasing by 362.63% YOY. The growth rate rose by 319.38% YOY.

The price of Chinese chemical fertilizers began to decline since the middle of March 2009. The decline accelerated in middle and late May. Prices of many chemical fertilizer products are lower than those during the hardest period of the financial crisis, hitting the lowest point in the two years. Since May, prices of urea, ammonium hydrogen carbonate, compound fertilizer, potash fertilizer, monoammonium phosphate, diammonium phosphate and ammonium chloride continued to decrease. This was mainly due to the excess supply.

In 2009 H1, fixed asset investment in Chinese chemical fertilizer industry remained high. Fixed asset investments on nitrogen fertilizer, phosphate fertilizer, potash fertilizer and compound fertilizer rose by 11.2% YOY, 73.7% YOY, 46.9% YOY and 67.4% YOY respectively. Investments on newly-commenced projects of nitrogen fertilizer, phosphate fertilizer, potash fertilizer and compound fertilizer increased by 2.3% YOY, 41.8% YOY, 26.7% YOY and 72.7% YOY respectively.

According to the market in 2009 H1, it is estimated that productivity of Chinese chemical fertilizers will maintain increase in 2009 H2 but the imbalance of supply and demand will exist. The productivity of nitrogen fertilizer and phosphate fertilizer will be higher than the production; the production will be higher than the demand. Moreover, contradiction between supply and demand of potash (caused by limited domestic resources) will be released. It is predicted that the overcapacity of Chinese nitrogen fertilizer and phosphate fertilizer will exceed 5 million tons and 2.5 million tons respectively. The supply of potash fertilizer will exceed the demand, that is, Chinese production and storage can meet the domestic demands.

Through this report, readers can acquire more information:

- Operation of Chinese chemical fertilizer manufacturing industry, 2008-2009 H1
- Production of Chinese chemical fertilizers, 2008-2009 H1
- Import and export of Chinese chemical fertilizers, 2008-2009 H1
- Main regions of Chinese chemical fertilizer industry, 2008-2009
- Price trend of Chinese fertilizer, 2008-2009
- Policies of Chinese chemical fertilizer industry, 2008-2009
- Main events in Chinese chemical fertilizer industry, 2008-2009
- Prediction on the development of Chinese chemical fertilizer industry, 2009-2010

Following persons are recommended to buy this report:

- Chemical fertilizer manufacturers
- Chemical fertilizer traders
- Relevant enterprises in the chemical fertilizer industrial chain
- Investors concerning Chinese chemical fertilizer industry
- Research institutions concerning Chinese chemical fertilizer industry
- Others concerning Chinese chemical fertilizer industry

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