

# Research Report on Chinese Compound Fertilizer Industry, 2010-2011

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## Abstracts

Compound fertilizer contains at least two elements of nitrogen, phosphorus and potassium. Compound fertilizer with two elements is called binary compound fertilizer while that with three elements is called ternary compound fertilizer.

Presently, Chinese farmers have got used to applying N-P-K (nitrogen, phosphorus and potassium) fertilizers and microelement fertilizers instead of straight fertilizers. This significantly raises the scale of Chinese compound fertilizer market. In 2009, the scale was about CNY 200 billion.

By the end of 2009, there were over 4,500 compound fertilizer producers in China with the aggregate production capacity of over 200 million tons. In 2009, the production of Chinese compound fertilizers totaled over 50 million tons. Chinese compound fertilizer production mainly concentrates in Shandong, Jiangsu, Hubei and Sichuan, etc.

Compared with those formulations of soil testing and formulated fertilization programs, Chinese current fertilizer formulations only possess the conformity degree of less than 3%. Most compound fertilizer producers in China make their formulations based on raw material prices and economic effectiveness instead of soil and crop demands. This results in excessive fertilizer formulations. The simple design and low cost of formations lead to the blind expansion of Chinese compound fertilizer production capacity. Though the production capacity is already under severe surplus, it is still being expanded. In 2009, the investment in Chinese compound fertilizer manufacture industry totaled CNY 23.60 billion, 39% increase over 2008; the number of construction projects reached 589, rising by 28% YOY; the number of newly-started projects amounted to 464, growing by 31% YOY; the number of completed projects was 377, going up by 48% YOY.

Since the end of 2008, the global financial crisis broke out, which has also influenced Chinese compound fertilizer industry. The profits of this industry hit the record low. In 2010, the influence of the financial crisis is weakened and the global economy is under recovery. However, Chinese compound fertilizer industry still stays in the adjustment stage, difficult to achieve rapid development in the short run.

In recent years, with the development of Chinese agricultural specialization, farmers are placing higher requirements on compound fertilizer for the cultivation of high-end cash crops. Nitrogen fertilizers are quite popular with consumers. In fact, most imported ternary compound fertilizers are applied in these high-end cash crops.

Despite the severe overcapacity in Chinese compound fertilizer industry, large quantities of ternary compound fertilizers are being imported every year. On one hand, these imported fertilizers can supplement the deficiency of Chinese potash fertilizers; on the other hand, imported compound fertilizers dominate Chinese high-end market.

It is forecast that Chinese ternary compound fertilizer will sustain rapid development in the coming years. Compared with straight fertilizers, compound fertilizers can better satisfy the growth demands of crops; with the development of Chinese agricultural specialization and scale, especially in economically-developed areas, the demand for high-efficiency, specialized and functional ternary compound fertilizers will see prominent growth. Therefore, ternary compound fertilizer will become the mainstream in Chinese compound fertilizer market.

**Through this report, readers can acquire more information:**

- Supply of Chinese compound fertilizer industry
- Demand of Chinese compound fertilizer industry
- Development Environment of Chinese compound fertilizer industry
- Competition in Chinese compound fertilizer industry
- Import and export of Chinese compound fertilizer industry
- Operation of major compound fertilizer producers in China
- Contacts of major compound fertilizer producers in China
- Development trend of Chinese compound fertilizer industry
- Investment opportunities in Chinese compound fertilizer industry

**Following persons are recommended to buy this report:**

- Fertilizer producers

- Fertilizer import and export enterprises
- Agricultural enterprises
- Research Institutes concerning Chinese fertilizer industry
- Investors concerning Chinese fertilizer industry
- Others concerning Chinese fertilizer industry

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