

# Vietnam Chemicals Comprehensive Report Q2/2016

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## Abstracts

Chemical industry plays an important role in economic development as it provides materials input for a number of essential industries, serving manufacturing and consumption. In Vietnam, under Decision 207/2005/QD-TTg the chemical industry is showcased as one of the key industries and prioritized according to the country's socioeconomic development strategy. All domestic and external resources will focus on putting into place a comprehensive chemical industry, covering main domains such as fertilizer, common and special-use rubber, base chemicals (including both organic and inorganic chemicals), petro-chemistry, pure chemicals, pharmaceutical chemistry, and consumer chemicals to meet domestic demand and the requirements of regional and world economic integration. As calculated by Vietnam Industry Research and Consultant, Fertilizer and Nitrogen accounts for the highest proportion (30%) in the industry by revenue, followed by the group of Detergent. The group of Synthetic Fibers contributes little to the structure of chemical industry by revenue.

This is a comprehensive research of chemical industry in Vietnam which witnessed high growth rate of 19.25% from 2010-2014, and is expected to grow substantially afterwards. Chemicals ranked 11th among the top imported items in the country with a turnover of 1.94 billion US dollars and has just started to develop and met only 15-20% of demand meanwhile consumption in many areas every year are so high. Gaps in the market are also canvassed in detail, breaking the market into key components. As discussed in the research, one of the biggest weaknesses of Vietnam chemical industry is the ability to supply input materials, thus, the majority of input materials has to be imported with China as the biggest import market, accounting for 29.8% of the 988 million USD total import turnover. Another looming problem in Vietnam is the inferior technology machinery systems which are largely at average low level in comparison with other countries in the region, resulted in the low in productivity and added value. The report also enables direct comparison to be made between existing companies in the industry and provides a clear understanding of their positions. In detail, in 2014,

Petro Vietnam Fertilizer and Chemicals Corporation (DPM) has achieved in overall highest ranks in terms of gross profit margin (25%), followed by Petro Vietnam Ca Mau Fertilizer JSC (DCM); however, as in a perception of a shareholder, the research may appeals you with 38% Return of Equity (ROE) of Binh Dien Fertilizer JSC (BFC).

This report provides a comprehensive review about the global and Vietnam chemical industry based on specific and trustworthy data, particularly regarding:

Overall scenario of the global, regional, domestic economies, with America, China, and Germany described

8 Product Segments: Fertilizer and Nitrogen, Detergent, Plastics and Printing Ink, Synthetic Rubber and Polymer, Plant Protection Chemical, Basic Chemical, Synthetic Fibers and Other. Detailed analysis is conducted about production, consumption, import, export, raw material, technology of each segment

Profiles, structure, and financial analysis of leading producers and major suppliers, such as Petro Vietnam Ca Mau Fertilizer JSC (PVCFC), Petro Vietnam Fertilizer and Chemicals Corporation (PVFCCo), Lam Thao Superphosphate Fertilizer and Chemicals JSC (LAFCHEMCO), Binh Dien Fertilizer JSC, etc.

Updated data about prices, cost, indicators, etc. from 2008-2014

Analysis and forecast of global and domestic markets.

## COMPANIES MENTION

PetroVietnam Ca Mau Fertilizer JSC (DCM)

Petrovietnam Fertilizer and Chemicals Corporation (DPM)

Lam Thao Superphosphate Fertilizer and Chemicals JSC (LAS)

Southern Basic Chemicals JSC

LIX Detergent JSC (LIX)

Dry Cell & Storage Battery Joint Stock Company (PAC)

Saigon Plan Protection JSC (SPC)

Duc Giang Chemical and Detergent JSC(DGC)

Vietnam Fumigation Groups (VFG)

Binh Dien Fertilizer JSC (BFC)

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