

# Vietnam Fertilizer Comprehensive Report Q2.2017

<https://marketpublishers.com/r/VA67EDC422FEN.html>

Date: May 2017

Pages: 108

Price: US\$ 2,495.00 (Single User License)

ID: VA67EDC422FEN

## Abstracts

Fertilizer market continued to encounter oversupply in the period 2014-2015, nutrient supply by component is estimated to increase 4.03% while demand went up just 2.04%. The oversupply within the fertilizer industry and other exogenous factors affecting the global supply from 2014 until now are the lack of natural gas supply, the increase in volatility associated to trade measures and the sharp decline in oil prices.

Fertilizer prices decreased over years, mainly caused by the oversupply and the drop in prices of raw materials.

In Vietnam, players in the fertilizer industry are classified by business forms, namely Manufacturing Enterprises (produce mainly Urea, Phosphate, NPK and DAP), Import and Export Enterprises (import 100% of Kali and SA) and Trading Enterprises.

Average supply always exceeds 148% compared with demand. Domestic fertilizer production focused on single fertilizers. NPK and DAP are the only mixed fertilizers produced but the quality standard is still not satisfied yet, especially DAP. NPK accounts for over 40% of total production volume, followed by Urea, Phosphate and other mixed fertilizers. Meanwhile, Potash and SA are nearly impossible to produce domestically, therefore 100% of which has to be imported.

Fertilizer consumption tends to drop over years due to the effects of agricultural products' export price, the decrease in arable land and the negative impact of weather. Fertilizer import fluctuated continuously through years due to the impacts of domestic supply sources as well as the import tax policies of Vietnam and major import markets.

Export has continuously dropped since 2012, caused by the competition with Chinese fertilizers in Korea, Cambodia, etc. and the effect of El Nino on the countries in the region. Although following the global price trend, the increase and decrease rates of

domestic price are always lower than those of the world. Presently, the technology in Vietnam is very various, ranging from old-fashioned to modern ones. In which, NPK is the easieast fertilizer to produce, therefore its production technology is the most various.

Fertilizer Industry is in saturation state, products of domestic companies have an intense competition with imported ones. Meanwhile, fertilizer demand tends to drop, leading to a downward pressure on prices in the period 2016 – 2020f.

## Contents

Executive summary

### **1. BUSINESS ENVIRONMENT**

#### 1.1. Macroeconomic situation

Figure 1. GDP growth, 2011 – 2016e

Figure 2. CPI fluctuations by month, 1/2014 - 3/2017

Figure 3. VND/CNY exchange rate, 1/2016 – 3/2017

Figure 4. VND/USD exchange rate, 3/2015 - 3/2017

Figure 5. Export and import turnover by quarter, 2015 - Q1/2017

#### 1.2. Legal Barriers – Regulations on manufacturing, trading and use of fertilizer

#### 1.3. Trade Agreements

Figure 6. Vietnam Integration Process from 1995 until now

Table 1. Tax schedule of Vietnam – EAEU Free Trade Agreement

### **2. INDUSTRY PERFORMANCE**

#### 2.1. Global Fertilizer Market

##### 2.1.1. Supply-Demand

Figure 7. Fertilizer Demand by Nutrients and Nutrients Supply, 2012 – 2015e

##### 2.1.2. Import-Export

Figure 8. Fertilizer import, 2012 - 2016e

Figure 9. Export structure by volume, 2016e

Figure 10. Import structure by volume, 2016e

##### 2.1.3. Price Movement

Figure 11. Price movement of main fertilizers, 1/2012 – 3/2017

##### 2.1.4. Fertilizer Production and Consumption in typical countries

#### 2.2. Vietnam Fertilizer Market

##### 2.2.1. Industry Background

##### 2.2.2. Definition and Classification

Figure 12. Structure of major fertilizers, 2014

##### 2.2.3. Scale and Feature

Figure 13. Revenue growth rate by year, 2010 – 2015

Figure 14. Market share by revenue, 2015

##### 2.2.4. Major Activities

##### 2.2.5. Inputs

Figure 15. Coal Consumption by industry

- Figure 16. Coal reserve by area
- Figure 17. Coal supply and demand forecast, 2015-2030
- Figure 18. Ore reserve exploration, 2014
- Figure 19. Ore demand forecast for fertilizer production, 2015-2030
- Figure 20. Natural Gas Consumption By Sectors
- 2.2.6. Production Technology
- Table 2. NPK production technology
- 2.2.7. Supply-Demand
- Figure 21. Supply - Demand, 2012 – Q1/2017e
- Figure 22. Production and consumption of domestic enterprises,

## **2012 – Q1/2017E**

- Figure 23. Domestic Production, 2012 – Q1/2017e
- Table 3. Production capacity of large domestic enterprises, 9/2016
- Figure 24. Fertilizers demand and consumption, 2010 –2016e
- 2.2.8. Import-Export
- Figure 25. Fertilizer Import, 2012 – Q1/2017e
- Figure 26. Fertilizer import by type, 2012 – Q1/2017e
- Figure 27. Fertilizers import, 2012 - Q1/2017e
- Figure 28. Fertilizers import structure by type, Q1/2017
- Figure 29. Structure of import volume by countries, Q1/2016 – Q1/2017
- Figure 30. Fertilizer export, 2012 - Q1/2017e
- Figure 31. Fertilizers export by country, Q1/2017e
- Figure 32. Fertilizers export by country, Q1/2016 - Q1/2017
- 2.2.9. Inventories
- Figure 33. Inventories, 2010 – 2016e
- 2.2.10. Price Movement
- Figure 34. Fertilizer Price movement, 2014 - Q1/2017
- 2.2.11. Transportation and Distribution
- Figure 35. Major sea ports in Vietnam, 2015
- 2.3. Industry Risks
- Figure 36. Worldwide coal and oil price movement, 2011 – 2016
- Figure 37. Salt – marsh, Q2/2016
- Figure 38. Crop Structure, 2014
- Figure 39. Area of paddy fields over years 2010-2014
- Figure 40. Fertilizer demand by plant
- Figure 41. Agricultural export, 2015 - 2016
- Figure 42. Rice planting area by seasons, 2016

Figure 43. Rice planting area by regions, 2012 - 2016

Figure 44. Rice output by seasons, 2012 - 2016

## 2.4. Planning and Forecast

2.4.1. Planning

2.4.2. Global forecast

Figure 45. Forecast world demand for fertilizer nutrients - world supply of nutrients, 2015 – 2019e

2.4.3. Domestic forecast

Figure 46. Supply – Demand Forecast, 2016f - 2020f

## 3. ENTERPRISE ANALYSIS

### 3.1. Top 10 Enterprises

Table 4. Top 10 enterprises with largest revenues in 2015 (Group of listed enterprises)

### 3.2. Business Performance Indicator Group

Figure 47. Net revenues, 2015 – 2016

Figure 48. Gross profit margin, 2015 - 2016

Figure 49. Self-financing rate, 2015 - 2016

Figure 50. Selling expenses, 2015 - 2016

Figure 51. G&A expenses, 2015 - 2016

### 3.3. Financial Indicator Group

Figure 52. Fixed asset ratio, 2015 - 2016

Figure 53. Inventory turnover, 2015 - 2016

Figure 54. Average collection period, 2015 - 2016

Figure 55. Profit Ratio, 2015 - 2016

### 3.4. Payment Indicator Group

Figure 56. Payment Indicators, 2015 - 2016

## I would like to order

Product name: Vietnam Fertilizer Comprehensive Report Q2.2017

Product link: <https://marketpublishers.com/r/VA67EDC422FEN.html>

Price: US\$ 2,495.00 (Single User License / Electronic Delivery)

If you want to order Corporate License or Hard Copy, please, contact our Customer Service:

[info@marketpublishers.com](mailto:info@marketpublishers.com)

## Payment

To pay by Credit Card (Visa, MasterCard, American Express, PayPal), please, click button on product page <https://marketpublishers.com/r/VA67EDC422FEN.html>