

Vietnam Fertilizer Standard Report Q4.2016

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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, 2010 – 9 months/2016

Figure 2. CPI fluctuations, 2014 – 9/2016

Figure 3. VND/CNY exchange rate, 1/2016 – 9/2016

Figure 4. VND/USD exchange rate, 3/2015 – 9/2016

Figure 5. Foreign Exchange Reserve, 2010 - 2014

Figure 6. Vietnam's export and import turnover, Q1/2014 – Q3/2015

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

1.2. Legal Barriers – Regulations on Import and Export tax

1.3. Trade Agreements

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 export, 2010 - 2015e

Figure 9. Fertilizer import, 2010 - 2015e

Figure 10. Export structure by volume, 2014 – 2015e

Figure 11. Import structure by volume, 2014 – 2015e

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 - 2014

Figure 14. Market share by revenue

Figure 15. Structure of Rice Area by Crop

Figure 16. Paddy Field Area

Figure 17. Rice Production By Crop

2.2.4. Major Activities

2.2.5. Supply-Demand

Figure 18. Supply - Demand, 2010 – 9 months/2016e

Figure 19. Production and consumption of domestic enterprises, 2010 – 9 months/2016e

Figure 20. Domestic Production, 2010 – 9 months/2016e

Table 1. Production capacity of large domestic enterprises, 9/2016

Figure 21. Fertilizers demand and consumption, 2010 – 9 months/2016e

2.2.6. Import-Export

Figure 22. Structure of import volume by countries, 2014 – 2015

Figure 23. Fertilizer import, 9 months/2015 – 9 months/2016

Figure 24. Fertilizers import structure by country, 9 months/2015

Figure 25. Fertilizers import structure by country, 9 months/2016

Figure 26. Fertilizer export, 2010 – 9 months/2016e

Figure 27. Structure of export volume by country, 2014 - 2015

Figure 28. Fertilizers export by country, 9 months/2015 – 9 months/2016

2.2.7. Inventories

Figure 29. Inventories, 2010 – 2015e

2.3. Planning

3. ENTERPRISE ANALYSIS

3.1. Top 10 Enterprises

Table 2. Top 10 enterprises with largest revenues in 2015 (Group of listed enterprises)

3.2. Business Performance Indicator Group

Figure 30. Net revenues, 2014 – 2015

Figure 31. EBITDA, 2015

Figure 32. Financial Cost, 2014 – 2015

Figure 33. Sales Cost, 2014 – 2015

Figure 34. Enterprise Management Cost, 2014 – 2015

3.3. Financial Indicator Group

Figure 35. Total Assets, 2014 – 2015

Figure 36. Inventory turnover, 2015

Figure 37. Receivables turnover, 2015

Figure 38. Profitability indicators, 2015

3.4. Cash Flow Indicator Group

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