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Fertilizers in China

Industry Study with Forecasts for **2015 & 2020**

Study #2870 | June 2012 | \$5400 | 175 pages

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Demand for fertilizers in China will be supported by a growth in the amount of sown areas, the rise in income levels for rural farmers, and government subsidies to encourage additional use.

Demand to grow 3.3% per annum through 2015

Demand for fertilizers in China is forecast to increase 3.3 percent per annum through 2015 to 262 million metric tons. Sales of fertilizers will be supported by healthy expansion of agricultural activities as the amount of sown areas continues to grow and rural income levels rise. Farmers will continue to register steadily increasing incomes, the result of growing crop prices and government subsidies designed to supplement their revenues and reduce their material costs. Subsidies aimed directly at cutting the cost of fertilizers will encourage additional use. In addition, rising crop prices have encouraged farmers to invest in fertilizers to further boost crop yields. Advances will also be driven by increases in the hectareage of sown land dedicated to growing cash crops. However, increasing demand for organic food and improved understanding of the correct application of fertilizers will prevent demand from rising at a faster pace.

In value terms, fertilizer demand is expected to grow 6.0 percent per year to 548 billion yuan, outpacing gains in volume terms. Faster value growth will be driven by strong demand for higher-value multi-nutrient fertilizers. In addition, advances will be supported by continued growth in fertilizer prices as the cost of natural gas, oil, coal, and other raw materials continues to increase.

Fertilizer nutrients to rise 4.4% yearly through 2015

Demand for fertilizer nutrients in China is projected to grow 4.4 percent annually

Fertilizer Demand in China (262 million metric tons, 2015)

Single-Nutrient
73%

Multi-Nutrient
27%



through 2015 to 98.1 million metric tons. Nutrient demand will be stimulated by increasing use of higher nutrient level products as income levels grow in rural areas in China. In addition, government efforts to promote multi-nutrient fertilizers will also support gains in fertilizer nutrient demand. Accounting for more than three-fourths of total fertilizer demand in 2010, single-nutrient fertilizers will remain the larger product type through 2015, despite a relatively low growth rate of 2.1 percent per year. Sales of single-nutrient fertilizers will continue to be supported by their relatively low prices. Multi-nutrient fertilizer demand will post a strong annual growth rate of 7.3 percent through 2015, fortified by government efforts to promote their utilization.

Central-South, Central-East regions to remain largest

The size, growth and composition of fertilizer demand in the six regions that make up China vary considerably. The Central-South and Central-East will remain the two largest regional fertilizer markets. Due to the comparatively high income levels in the Central-South and Central-East -- which enable residents to afford more expensive food items -- demand for cash crops such as fruits and vegetables will rise in these regions, which in turn will fuel demand for fertilizer. Sales in the Northeast and Northwest regions will outpace the average through 2015, benefiting from the Great Western Development Strategy, the Northeast Revitalization Policy, and increasing income levels for farmers.

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Sample Text, Table & Chart

SINGLE-NUTRIENT FERTILIZERS

Phosphate Fertilizer Supply & Demand

Phosphate fertilizer demand is less steady than that for other fertilizers, as phosphate is removed from the soil at a slower rate than nitrogen and thus does not require yearly replenishment. Single-nutrient phosphate fertilizer demand is expected to grow at a slower rate than nitrogen phosphate fertilizer demand, which will grow at a faster rate than nitrogen phosphate fertilizer demand. Single-nutrient phosphate fertilizer demand will grow at a slower rate than nitrogen phosphate fertilizer demand, which will grow at a faster rate than nitrogen phosphate fertilizer demand. Single-nutrient phosphate fertilizer demand will grow at a slower rate than nitrogen phosphate fertilizer demand, which will grow at a faster rate than nitrogen phosphate fertilizer demand.

SAMPLE TEXT

Phosphate fertilizers are highly immobile in soils due to their ability to form slowly soluble compounds with a number of common soil elements, and therefore are quickly fixed. Thus, only about 20 percent of the applied phosphate is utilized by planted crops in the first year of fertilization. The remaining phosphate is mixed into the soil by subsequent crops. The overapplication of phosphate fertilizer creates a “bank” of reserves in the soil which may be drawn upon in subsequent years if prices are not favorable for farmers.

Demand for phosphate fertilizers contracted in 2009 due to a slowdown in the global economy, dampening farmers’ desire to purchase fertilizers such as phosphate. The price of phosphate fertilizer will continue to grow through 2015 as the government enacts policies to set a benchmark price. In addition, growth in phosphorus demand for support rises in phosphate fertilizer prices.

Leading phosphate fertilizer suppliers in China include Kailin, Hubei Newyangfeng Fertilizer, Hubei Yihua, Luxi Chemical, and others.

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TABLE V-6

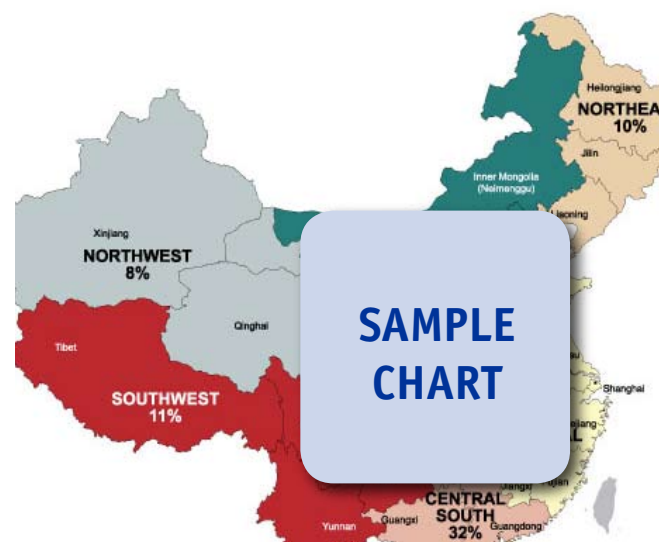
NITROGEN-PHOSPHATE FERTILIZER NUTRIENT DEMAND IN CHINA BY CROP (000 metric tons -- nutrient content)

Item	2000	2005	2010	2015	2020
Total Sown Area (mil hectares) m tons NP nutrient/000 hectares					
Nitrogen-Phosphate Nutrient Demand					
Vegetables					
Wheat					
Rice					
Corn					
Fruits					
Soybeans					
Other	475	695	965	1270	1510

SAMPLE TABLE

CHART VII-1

FERTILIZER DEMAND IN CHINA BY REGION, 2010 (222.5 million metric tons)

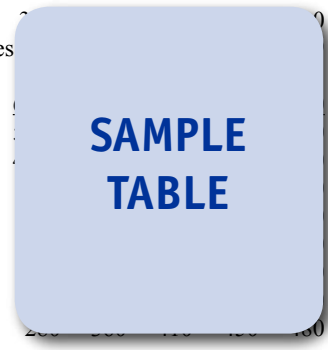


SAMPLE CHART

Sample Profile, Table & Forecast

TABLE VI-3
RICE MARKET FOR FERTILIZER NUTRIENTS IN CHINA
 (000 metric tons -- nutrient content)

Item	2000	2005	2010	2015	2020
Sown Area in Rice (mil hectares)					
m tons fertilizer nutrient/000 hectares					
Fertilizer Nutrient Demand					
Single-Nutrient:					
Nitrogen					
Phosphate					
Potash					
Multi-Nutrient:					
Nitrogen-Phosphate-Potash					
Nitrogen-Phosphate					
Other					



COMPANY PROFILES

Yunnan Yuntianhua Company Limited
 Shuifu
 Zhaotong, Yunnan 657800
 China
 86-87-90
 http://w

Sales: ¥
 Employ

Key Pro
 Internation

SAMPLE PROFILE

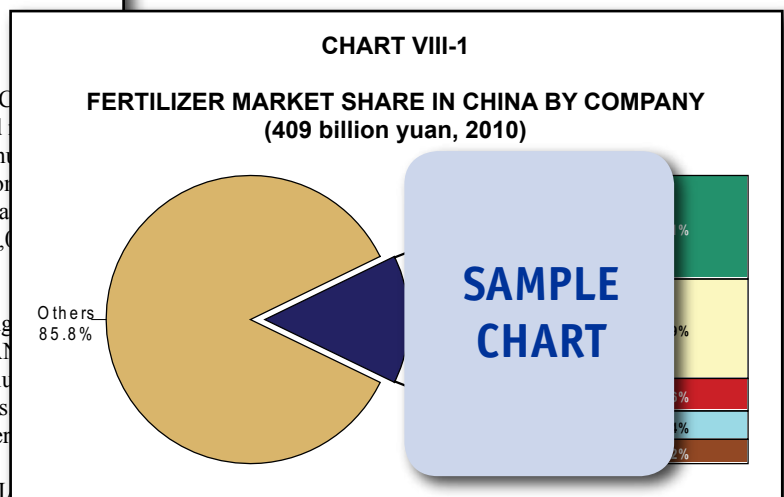
Yunnan Yuntianhua, the second largest fertilizer supplier in China in 2010, accounted for 4.9 percent of domestic sales, with related revenues of ¥20.1 billion. Yunnan Yuntianhua is engaged in the manufacture and distribution of fertilizers and organic chemicals. The Company also has fiber glass and commercial trade businesses. Yunnan Yuntianhua operates from a site in Yunnan that encompasses 126,000 square meters of space.

The Company is part of the Chinese fertilizer industry through the production and marketing of fertilizers under the JINSHAJIANG brand name. Yunnan Yuntianhua's JINSHAJIANG fertilizers include urea types, which are available in standard and granulate varieties. The Company also makes JINSHAJIANG ammonium nitrate fertilizer.

Furthermore, Yunnan Yuntianhua makes and sells JINSHAJIANG compound fertilizers through its Zhaotong Tianhe Company Limited subsidiary. Zhaotong Tianhe's compound fertilizers include sulfur-

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OTHER STUDIES

Home & Garden Pesticides

US demand for home and garden pesticides is projected to increase 3.2 percent per year to \$2.3 billion in 2016. Insecticides and fungicides will be the fastest growing types. Household applications will outpace lawn and garden uses, promoted by increased awareness of pest-borne diseases and by continued problems with aggressive insects. This study analyzes the \$2 billion US home and garden pesticide industry, with forecasts for 2016 and 2021 by product, application and raw material. The study also evaluates company market share and profiles industry players.

#2947 October 2012 \$4900

World Agricultural Pesticides

World demand for formulated agricultural pesticides is forecast grow 3.8 percent annually through 2016 to \$59 billion. The fastest growth is expected in developing countries of Eastern Europe, South America, and Asia. Product demand will benefit from more value-added pesticide formulations with multiple active ingredients. This study analyzes the \$49 billion world agricultural pesticide industry, with forecasts for 2016 and 2021 by product, market, world region and for 43 countries. The study also evaluates company market share and profiles industry participants.

#2902 August 2012 \$6200

World Agricultural Equipment

World demand for agricultural equipment is expected to increase 6.8 percent per year through 2016 to \$175 billion. The Asia/Pacific region -- led by China and India -- will be the fastest growing market, followed by Central and South America. Plowing and cultivating machinery will be the fastest growing product type. This study analyzes the \$126 billion world agricultural equipment industry, with forecasts for 2016 and 2021 by type, world region and for 20 major countries. The study also evaluates company market share and profiles industry participants.

#2892 June 2012 \$6100

Pesticides

US demand for formulated pesticide products is forecast to increase 2.6 percent per year to \$12.1 billion in 2016. Gains will be driven in part by rising demand for new formulations used in multiple settings. Herbicides will remain the largest product segment and show the strongest growth. The agricultural market will remain dominant and grow the fastest. This study analyzes the \$10.7 billion US pesticides industry, with forecasts for 2016 and 2021 by product and market. The study also evaluates company market share and profiles industry competitors.

#2877 April 2012 \$4800

Agricultural Pesticides in China

Demand for formulated pesticides in the agricultural market in China is forecast to increase 5.3 percent per annum to 2.3 million metric tons in 2015. Insecticides will remain the dominant product type while fungicides will grow the fastest. This study analyzes the 1.8 million metric ton agricultural pesticides industry in China, with forecasts for 2015 and 2020 for formulated pesticides and pesticide active ingredients by type, class, crop and geographic region. The study also evaluates company market share and profiles industry participants.

#2850 April 2012 \$5400

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