

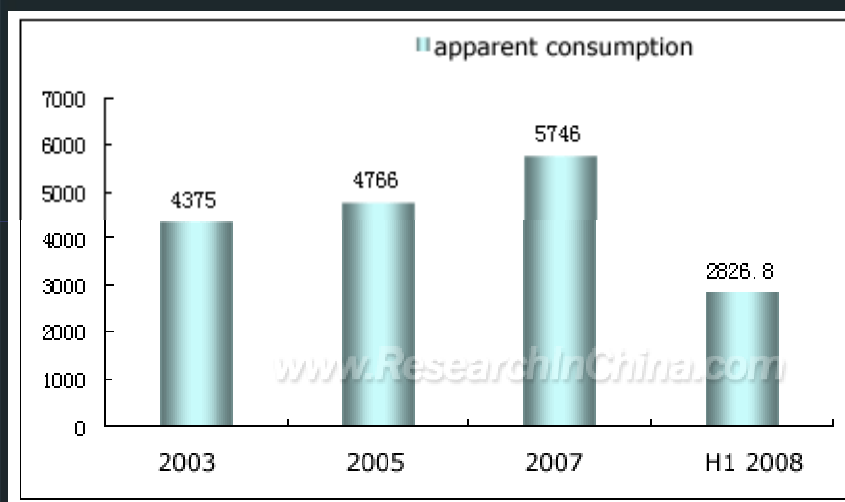
## China Fertilizer Market Report, 2008



Fertilizer, as one of the fundamental materials for the development of Chinese national economy, its output value accounts for 20% of the chemical industry. In the first half of 2008, along with the sharp price raise of the energy and raw materials both at home and abroad, the fertilizer price also increased sharply. The fertilizer output reached over 30 million tons in china, up 5.9% compared to the same period in 2007; moreover, the apparent consumption amounted to more than 28 million tons with a growth rate above 5%.

## China's Fertilizer Apparent Consumption, 2003-H1

**2008**  
(Unit: 10,000 tons)



Source: ResearchInChina

In addition to the potassium fertilizer, China is a net exporter of urea and phosphate, however, since the implementation of the special export tariff, the Fertilizer production has been certainly affected and the fertilizer export has been greatly reduced.

Starting from Sep. 1<sup>st</sup> 2008, 150% extra export tariff was levied on the urea, which would not only restrain the urea export in H2 2008, but also might reduce the prospective production capacity during 2009-2011.

### China's Policy of Export Tariff on Urea, 2005-2008

Year	Export Tariff
2005	Jan.-May, CNY260 per ton; Jun.-Oct., 30%; Nov.-Dec. 15%.
2006	Jan.-Sep. 30%; Oct.-Dec. 15%.
2007	Jan.-Sep. 30%; Oct.-Dec. 15%.
Apr. 18 <sup>th</sup> 2008	Apr.20 <sup>th</sup> -Sep. 30 <sup>th</sup> , extra 100%
May 19 <sup>th</sup> 2008	May 20 <sup>th</sup> -Dec. 31 <sup>th</sup> , extra 100%
Sep. 1 <sup>st</sup> 2008	Sep. 1 <sup>th</sup> -Dec. 31 <sup>th</sup> , extra 150%

Source: ResearchInChina

Based on the authoritative statistics from the State Information Center and the National Bureau of Statistics of China, this report makes an in-depth analysis of the status quo, the development trend and related policies of China's fertilizer industry. In addition, it also analyzes the development of some key fertilizer manufacturers and predicts the future development of the fertilizer industry.

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