

China Fertilizer and Pesticide Industry Statistics, 2009-2010

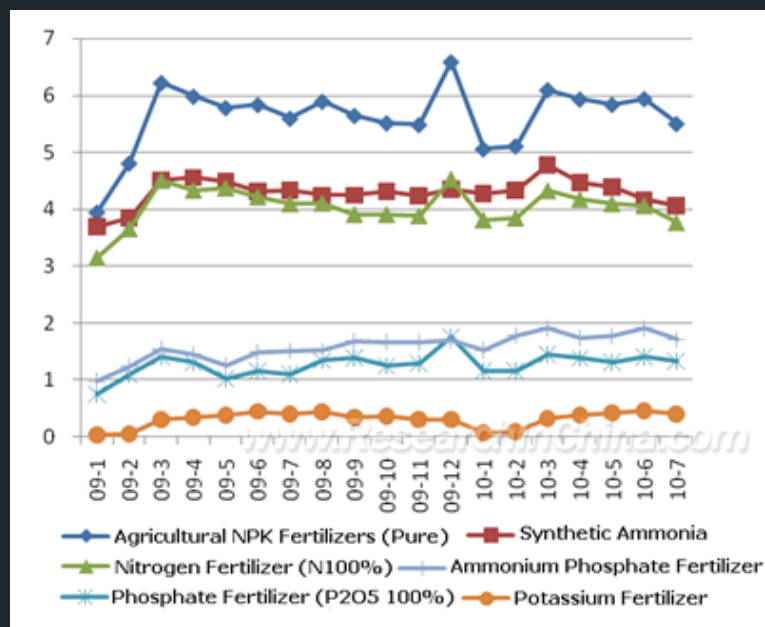


Fertilizer and pesticide are significant basic substances of agricultural production and closely related to the development of agriculture. Supported by domestic market demand and national policy, China's fertilizer and pesticide industry has developed rapidly in recent years, making China the world's major producer and exporter of fertilizer and pesticide.

In the first seven months of 2010, China's output of agricultural NPK fertilizers (pure) amounted to 39,472 kilotons, increased by 3.4% compared with the same period of 2009; of which, the output of nitrogen fertilizer (N100%) was 28,084 kilotons, down 0.92% from the same period of the prior year, and the output of phosphate fertilizer (P₂O₅ 100%) and potassium fertilizer (K₂O 100%) reached 9,216 kilotons and 2,172 kilotons, up 16.8% and 7.6% respectively over the same period of the previous year. The relative overcapacity of bulk fertilizer like nitrogen fertilizer and phosphate fertilizer in China brings along the large export volume of the products, while potassium fertilizer products are in comparatively short supply and China usually has to import a lot.

Take potassium chloride as an example. The import volume and value of potassium chloride in 2009 reached 1,980 kilotons and US\$1.18 billion respectively, approximately accounting for 49.1% and 59.6% of the total import volume and value of mineral and chemical fertilizers throughout the year respectively. In 2010H1, the import trend of potassium chloride was roughly the same as that of mineral fertilizers.

Output of Major Fertilizer Products in China, Jan.2009-Jul.2010 (Unit: 1000 Kt)



Source: National Bureau of Statistics of China; ResearchInChina

In the first seven months of 2010, the output of Chinese raw chemical pesticide, insecticide, and herbicide turned out to be 1,600 kilotons, 502 kilotons and 627 kilotons, up 8.3%, 0.3% and 36.3% year on year respectively; while the output of bactericide arrived at 102 kilotons, down 32.4% year on year. Currently, Chinese pesticides have been exported to over 150 countries and regions, basically covering the worldwide pesticide market, however, the exported products are mainly raw chemical pesticides with relatively low prices. In 2010, the international demand rises along with the gradually recovered global economy; together with the national abolishment of export tax rebates, China's export value and price of pesticide have increased to certain extent compared with the same period of 2009. In 2010Q2, the exported pesticide of China was 142 kilotons, down 1.3% from the same period of 2009, but the export value was US\$420 million, up 5.3% year on year, and the average export price hit US\$2958/ton, up 7.3% from the same period of 2009.

Owing to the rigid demand for fertilizer and pesticide as well as the investors' affirmation towards the fertilizer and pesticide industry outlook, the operation of Chinese fertilizer and pesticide industry took a favorable turn in 2010H1. During this period, the gross margin of China's fertilizer and chemical pesticide manufacturing reached 13.1% and 14.5%, respectively, of which, fertilizer experienced a YoY increase of 2.4 percentage points, while chemical pesticide manufacturing saw a slight decrease of 0.9 percentage point; the respective sales volume of agricultural NPK fertilizers and raw chemical pesticide (active principle 100%) was 32,653 kilotons and 1,267 kilotons, up 5.8% and 18.6% year on year respectively; the output/sales ratio hit 97.1% and 96.9%, respectively; and the inventory advanced by respective 10.7% and 21.5% from the beginning of the year.

This report presents a detailed description of the development trend of China's fertilizer and pesticide industry with more than 150 charts.

The data in this report will be updated quarterly.

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