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.
Table of Contents

I Overview of China Fertilizer Industry

1. Output & Sales Volume
  1.1 Output
  1.2 Output Distribution
  1.3 Sales Volume and Inventory

2. Export & Import
  2.1 Export
    2.1.1 Export Volume
    2.1.2 Export Value
    2.1.3 Average Export Price
  2.2 Import
    2.2.1 Import Volume
    2.2.2 Import Value
    2.2.3 Average Import Price

3. Major Financial Indices of Fertilizer and Its Sub-industries
  3.1 Fertilizer
  3.2 Nitrogen Fertilizer
  3.3 Phosphate Fertilizer
  3.4 Potassium Fertilizer
  3.5 Compound Fertilizer
  3.6 Organic Fertilizer
  3.7 Other Fertilizers

II Overview of China Pesticide Industry

4. Output & Sales Volume
  4.1 Output
  4.2 Output Distribution
  4.3 Sales Volume and Inventory

5. Export & Import

6. Major Financial Indices of Pesticide and Its Sub-industries
  6.1 Pesticide
  6.2 Chemical Pesticide
  6.3 Biochemical Pesticide and Microbial Pesticide
Selected Charts

- Common Fertilizer Categories and Commodity Names
- Output of Agricultural NPK Fertilizers (Pure), Jan.2009 - Jul.2010
- Output of Nitrogen Fertilizer (N100%), Jan.2009 - Jul.2010
- Output of Phosphate Fertilizer (P2O5 100%), Jan.2009 - Jul.2010
- Output of Potassium Fertilizer, Jan. 2009 - Jul.2010
- Output of Synthetic Ammonia, Jan.2009 – Jul.2010
- Output Distribution of Agricultural NPK Fertilizers (by Province), 2008
- Total Sales Volume of Agricultural NPK Fertilizers (Pure), 2009Q1-2010Q2
- Total Output/Sales Ratio of Agricultural NPK Fertilizers (Pure), 2009Q1-2010Q2
- Total Inventory Growth of Agricultural NPK Fertilizers (Pure) Compared with the Beginning of the Year, 2009Q1-2010Q2
- Export Volume of Carbamide, Jan.2009 – May 2010
- Average Export Price of Mineral Fertilizer and Fertilizer, Jan.2009 – May 2010
- Import Volume of Potassium Chloride, Jan.2009 – Jul.2010
• Import Volume of Potassium Sulfate, Jan.2009 – Jul.2010
• Import Value of Carbamide, Jan.2009 – Jun.2010
• Import Value of Potassium Chloride, Jan.2009 – Jun.2010
• Import Value of Potassium Sulfate, Jan.2009 – Jun.2010
• Average Import Price of Mineral Fertilizer and Fertilizer, Jan.2009 – Jun.2010
• Average Import Price of Carbamide, Jan.2009 – Jun.2010
• Average Import Price of Diammonium Phosphate, Jan.2009 – Jun.2010
• Average Import Price of Potassium Chloride, Jan.2009 – Jun.2010
• Average Import Price of Potassium Sulfate, Jan.2009 – Jun.2010
• Enterprise Quantity of Fertilizer Manufacturing, 2009Q1-2010Q2
• Main business Revenue of Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Profit of Fertilizer Manufacturing, 2009Q1-2010Q2
• Main Business Cost of Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Assets of Fertilizer Manufacturing, 2009Q1-2010Q2
• Revenue Per Capita of Fertilizer Manufacturing, 2009Q1-2010Q2
• Average Number of Employees of Fertilizer Manufacturing, 2009Q1-2010Q2
• Quantity of Loss-making Enterprises of Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Loss of Loss-making Enterprises of Fertilizer Manufacturing, 2009Q1-2010Q2
• Gross Margin of Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Industrial Sales of Fertilizer Manufacturing, 2009Q1-2010Q2
• New Product Output Value of Fertilizer Manufacturing, 2009Q1-2010Q2
• Enterprise Quantity of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Main Business Revenue of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Profit of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Main Business Cost of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Assets of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Revenue Per Capita of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Average Employees of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Gross Margin of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Industrial Sales of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• New Product Output Value of Nitrogen Fertilizer Manufacturing, 2009Q1-2010Q2
• Enterprise Quantity of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Main Business Revenue of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Profit of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Main Business Cost of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Assets of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Revenue Per Capita of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Average Number of Employees of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Gross Margin of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Industrial Sales of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• New Product Output Value of Phosphate Fertilizer Manufacturing, 2009Q1-2010Q2
• Enterprise Quantity of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
• Main Business Revenue of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Profit of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
• Main Business Cost of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
• Total Assets of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
• Revenue Per Capita of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
- Average Number of Employees of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
- Gross Margin of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
- Total Industrial Sales of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
- New Product Output Value of Potassium Fertilizer Manufacturing, 2009Q1-2010Q2
- Enterprise Quantity of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Main Business Revenue of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Total Profit of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Main Business Cost of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Total Assets of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Revenue Per Capita of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Average Number of Employees of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Gross Margin of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Total Industrial Sales of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- New Product Output Value of Compound Fertilizer Manufacturing, 2009Q1-2010Q2
- Enterprise Quantity of Organic Fertilizer & Microbial Fertilizer Manufacturing, 2009Q1-2010Q2
- Main Business Revenue of Organic Fertilizer & Microbial Fertilizer Manufacturing, 2009Q1-2010Q2
- Total Profit of Organic Fertilizer & Microbial Fertilizer Manufacturing, 2009Q1-2010Q2
- Main Business Cost of Organic Fertilizer & Microbial Fertilizer Manufacturing, 2009Q1-2010Q2
- Gross Margin of Organic Fertilizer & Microbial Fertilizer Manufacturing, 2009Q1-2010Q2
- Total Industrial Sales of Organic Fertilizer & Microbial Fertilizer Manufacturing, 2009Q1-2010Q2
- New Product Output Value of Organic Fertilizer & Microbial Fertilizer Manufacturing, 2009Q1-2010Q2
- Total Assets of Pesticide Manufacturing, 2009Q1-2010Q2
- Main Business Revenue of Pesticide Manufacturing, 2009Q1-2010Q2
- Total Profit of Pesticide Manufacturing, 2009Q1-2010Q2
- Main Business Cost of Pesticide Manufacturing, 2009Q2-2010Q2
- Sales Profit Margin of Pesticide Manufacturing, 2009Q1-2010Q2
- Revenue Per Capita of Pesticide Manufacturing, 2009Q1-2010Q2
- Average Number of Employees of Pesticide Manufacturing, 2009Q1-2010Q2
- Quantity of Loss-making Enterprises of Pesticide Manufacturing, 2009Q1-2010Q2
- Total Loss of Loss-making Enterprises of Pesticide Manufacturing, 2009Q1-2010Q2
- Gross Margin of Pesticide Manufacturing, 2009Q1-2010Q2
- Total Industrial Sales of Pesticide Manufacturing, 2009Q1-2010Q2
- New Product Output Value of Pesticide Manufacturing, 2009Q1-2010Q2
- Enterprise Quantity of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Main Business Revenue of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Main Business Cost of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Total Assets of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Revenue Per Capita of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Average Number of Employees of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Gross Margin of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Total Industrial Sales of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Export Delivery Value of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- New Product Output Value of Chemical Pesticide Manufacturing, 2009Q1-2010Q2
- Enterprise Quantity of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
- Main Business Revenue of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
• Total Profit of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
• Main Business Cost of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
• Total Assets of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
• Average Number of Employees of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
• Gross Margin of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
• Total Industrial Sales of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
• New Product Output Value of Biochemical Pesticide and Microbial Pesticide Manufacturing, 2009Q1-2010Q2
# How to Buy

<table>
<thead>
<tr>
<th>Product details</th>
<th>How to Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single user</td>
<td>By email: <a href="mailto:report@researchinchina.com">report@researchinchina.com</a></td>
</tr>
<tr>
<td></td>
<td>By fax: 86-10-82601570</td>
</tr>
<tr>
<td></td>
<td>By online: <a href="http://www.researchinchina.com">www.researchinchina.com</a></td>
</tr>
<tr>
<td>Enterprise-wide</td>
<td>By email: <a href="mailto:report@researchinchina.com">report@researchinchina.com</a></td>
</tr>
<tr>
<td></td>
<td>By fax: 86-10-82601570</td>
</tr>
<tr>
<td></td>
<td>By online: <a href="http://www.researchinchina.com">www.researchinchina.com</a></td>
</tr>
<tr>
<td>Publication date: Sep. 2010</td>
<td></td>
</tr>
</tbody>
</table>

For more information, call our office in Beijing, China:
Tel: 86-10-82600828
Website: www.researchinchina.com