



艾凯咨询
ICAN Consulting

2009-2012年中国复合肥行业市场研究与投资前景分析报告

一、调研说明

《2009-2012年中国复合肥行业市场研究与投资前景分析报告》是艾凯咨询集团经过数月的周密调研，结合国家统计局，行业协会，工商，税务海关等相关数据，由行业内知名专家撰写而成。报告意于成为从事本行业人士经营及投资提供参考的重要依据。

报告主要可分为四大部分，首先，报告对本行业的特征及国内外市场环境进行描述；其次，是本行业的上下游产业链，市场供需状况及竞争格局从宏观到细致的详尽剖析，接着报告中列出数家该行业的重点企业，分析相关经营数据；最后，对该行业未来的发展前景，投资风险给出指导建议。相信该份报告对您把握市场脉搏，知悉竞争对手，进行战略投资具有重要帮助。

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二、摘要、目录、图表

In recent years, the production technology of China's complex fertilizer developed quickly, more than 2,000 complex fertilizer manufacturers using agglomerating granulation process were established successively, the production capacity of most of which is 20,000 to 100,000 tons/year. Among them, 50 of the manufacturers have the production capacity of 100,000 tons/year. The largest one has 300,000 tons/year. Most of them produce medium and low concentration complex fertilizer. 50 of the manufacturers use a slurry method and have the capacity of 50,000 to 200,000 tons/year. But few of them adopt a melt granulation method. The devices which have been constructed and put into operation, are under construction and will be constructed are increasing day by day. According to the statistics of Beijing Huajing Viewpoint Information Consultants Co., Ltd., over 20 manufacturers which have started to produce with a melt prilling method are Batian Ecotypic Engineering Co., Ltd. in Shenzhen, Guangdong, Jinglong Fengli Chemical Co., Ltd. at Ningjin County, Xingtai City, Hebei, Stanley Fertilizer Stock Co., Ltd. in Linyi, Shandong, Shanxi Fengxi Fertilizer Yndustry (Group) Ltd. in Liyuan, and so on. Most of them have a production capacity of 100,000 to 300,000 tons/year, and the largest one has 800,000 tons/year. Over 10 manufacturers which are under construction and planned to be constructed are Hunan Yueyang Chemical Co., Ltd., Sichuan Kaiyuan Chemical Co., Ltd., and Guizhou Chemical Fertilizer Plant Co., Ltd. and so on. According to incomplete statistics, the total production capacity of urea-based complex fertilizer by the melt prilling method of manufacturers having started to produce, under construction and planned to be constructed is nearly 5,000,000 tons.

Along with the expanding of China's urea production capacity, the amount of urea used for processing and producing urea-based complex fertilizer trends up year by year. Since the technology for producing urea-based complex fertilizer of China has basically matured. More than half of the small nitrogenous fertilizer enterprises and several large nitrogenous fertilizer enterprises can produce the urea-based complex fertilizer. By the end of 2005, excluding China Petrochemical Corporation and China National Petroleum Corporation, the total yield of urea-based complex fertilizer produced by China's nitrogenous fertilizer manufacturers had reached over 4,000,000 tons, accounting for over 12% of the total yearly yield of 32,000,000 tons of complex fertilizer. The cost pressure and the price are still high and the sale confronts difficulty as to the complex fertilizer industry in the second half of 2008. The challenges and opportunities coexist as to the complex fertilizer enterprises; the price is still high and the

cost pressure will be transferred to downstream enterprises. It is predicted that the price of the complex fertilizer will still be high in the second half of 2008: firstly, the cost pressure of the complex fertilizer in the second half of 2008 will be higher than that in the first half year; parts of the complex fertilizer of the first half year is the low cost products of the last year, thus the price of the complex fertilizer of the first half year didn't really transfer the cost pressure of the upstream enterprises. Along with the continuous rising of recent periods, the adjustment of the current prices of various raw materials of the complex fertilizer has basically finished and the high prices have become foregone conclusion. The complex fertilizer of the second half of 2008 will face higher cost than the first half year; secondly, the hot-selling product in the second half year is mainly the phosphate and complex fertilizer; compared with the price of phosphate fertilizer, the parity advantage of the complex fertilizer is relatively obvious. Although the consumption of the complex fertilizer of this year falls generally, the complex fertilizer still accounts for parts of the original phosphate fertilizer for its price advantage and the demand increases relatively, which raises the price; thirdly, many small complex fertilizer enterprises are currently at the state of shut down due to the cost pressure; some enterprises with stronger strength reduce the production amount or produce according to sales; therefore, the supply decreases relatively, which raises the price. In addition, through investigation, under the pressures of production capacity, sales and so on, most of the complex fertilizer enterprises sustained some parts of the pressure of cost rising in the first half year. With the continuous rising of the cost in the second half year, the enterprises have reached the edge of non-profit; therefore, according to the profit-chasing principle of the enterprises, the cost pressure will naturally be transferred to the downstream. At present, the market has started to show the trend to transfer the cost pressure to the downstream and the trend will be obviously enhanced in the second half year.

The report describes the operation environment of China's complex fertilizer industry in details and intensively studies and predicts the development of its downstream industries and the long term and short term trend of the change of the demand on the complex fertilizer. Aiming at the opportunities and threats confronted by the industry presently, the report advances the investment for the development of the complex fertilizer industry by us and the strategic advices. With precise content, detailed data and intuitionistic graphs, the report helps the complex fertilizer enterprises to hold the development pulse of the industry exactly and establish the competition tactics and investment strategies correctly. Our major sources are from authoritative professional research institutions such as National Bureau of Statistics of China, State Information Center, China Customs and China Chemical Industry Association and the field researches of our center. The report includes the data resources and expert resources of several

authoritative institutions, extracts precise and real valuable information from many data, combine the environment that the industry is under and studies and analyzes in multiple angles, such as from theory to practice, from macro to micro; therefore, we try to reach the state of prospective conclusion and points of view and the uniformity of practicality and feasibility. This report is elaborately produced by expert group for one year after the market research and data collection of our center. It is one of the decision-making bases to enterprises of the complex fertilizer industry, relevant investment companies and governmental departments to hold the development trend of the industry exactly, to anticipate industry competition, to avoid the risk of operating and investment and to establish right competition and investment strategies and has an important reference value!

【 目 录 】

CHAPTER 1 GENERAL INTRODUCTION OF COMPLEX FERTILIZER	12
SECTION 1 OVERVIEW OF COMPLEX FERTILIZER	12
SECTION 2 CHARACTERISTICS AND DIFFERENCES OF COMPLEX FERTILIZER AND COMPOUND FERTILIZER	12
SECTION 3 APPLICATIONS OF COMPLEX FERTILIZER	14
SECTION 4 CHOOSE AND PURCHASE OF COMPLEX FERTILIZER	15
CHAPTER 3 ANALYSIS ON GLOBAL COMPLEX FERTILIZER MARKET DEVELOPMENT SITUATION IN 2008	22
SECTION 1 ANALYSIS ON TECHNICAL STANDARD AND SYSTEM OF GLOBAL COMPLEX FERTILIZER IN 2008	22
TAKING CHINA AS AN EXAMPLE, APPROVED ON JULY 26, 2001 BY GENERAL ADMINISTRATION OF QUALITY SUPERVISION, INSPECTION AND QUARANTINE OF THE PEOPLE'S REPUBLIC OF CHINA AND EFFECTIVE ON JANUARY 1, 2002	22
I. APPLICATION STANDARDS	22
III. PACKAGE, MARK, TRANSPORTATION AND STORAGE	24
SECTION 2 ANALYSIS ON PRODUCTION MODE OF GLOBAL COMPLEX FERTILIZER IN 2008	24
SECTION 3 ANALYSIS ON CHARACTERS OF COMPLEX FERTILIZER OF EUROPEAN AND AMERICAN DEVELOPED COUNTRIES IN 2008	24

I. HIGHER DEGREE OF COMPOUND OF FERTILIZER NUTRIENTS	24
II. HIGHER PROPORTION OF BLENDING FERTILIZERS IN COMPOUND FERTILIZER	25
III. ESTABLISHMENT OF PRODUCTION, SALES AND USAGE OF AGRICULTURE FERTILIZER SERVICE SYSTEM	25
SECTION 5 ANALYSIS ON DEVELOPMENT TREND OF GLOBAL COMPLEX FERTILIZER DURING 2009-2012	26
CHAPTER 4 ANALYSIS ON DEVELOPMENT OF COMPLEX FERTILIZER INDUSTRY IN MAIN COUNTRIES IN 2008	27
SECTION 1 USA	27
SECTION 2 EUROPE	28
SECTION 3 RUSSIA	28
V. SUGGESTIONS ON THE COUNTERMEASURES OF RESOURCE GUARANTEE OF THE DEVELOPMENT OF FERTILIZER INDUSTRY	29
CHAPTER 7 ANALYSIS ON THE DEVELOPMENT PATTERN OF CHINA ' S COMPLEX FERTILIZER INDUSTRY IN 2008	31
SECTION 1 ANALYSIS ON THE DEVELOPMENT CHARACTERISTICS OF CHINA ' S COMPLEX FERTILIZER INDUSTRY IN 2008	31
I. DEVELOPMENT CHARACTERISTICS OF CHINA ' S COMPLEX FERTILIZER MARKET	31
II. MARKET CHARACTERISTICS OF CHINA ' S HIGH EFFICIENT COMPLEX FERTILIZER	32
SECTION 2 ANALYSIS ON THE MARKET DEVELOPMENT OF CHINA ' S COMPOUND FERTILIZER IN 2008	33
I. ANALYSIS ON THE MARKET DEVELOPMENT SIZE OF 2008 CHINA ' S COMPLEX FERTILIZER	33
II. ANALYSIS ON THE OUTPUT OF CHINA ' S COMPLEX FERTILIZER IN 2008	34
III. ANALYSIS ON THE DEMAND STRUCTURE OF CHINA ' S COMPLEX FERTILIZERS IN 2008	35
VI. ANALYSIS ON THE DEVELOPMENT TECHNIQUE OF CHINA ' S COMPLEX FERTILIZERS IN 2008	36
SECTION 3 ANALYSIS ON THE MARKET PRICE OF CHINA ' S COMPLEX FERTILIZER IN 2008	36
SECTION 4 ANALYSIS ON KEY FACTORS AFFECTING THE DEMAND OF CHINA ' S	

COMPLEX FERTILIZERS IN 2008	37
I. THE ADJUSTMENT OF AGRICULTURAL PLANTING STRUCTURE	37
II. THE AMOUNT OF IMPORTED AND EXPORTED AGRICULTURAL PRODUCTS	37
III. RETURNING LAND FOR FARMING TO FORESTRY OR GRASSLAND IN WESTERN PROVINCES	37
VI. CONSUMPTION PREFERENCE OF FARMERS	38
V. THE IMPROVEMENT OF TECHNOLOGY	40
SECTION 5 ANALYSIS ON THE DEVELOPMENT OF FERTILIZERS IN PART OF CHINA IN 2008	40
I. HUBEI REGION	40
II. SHANDONG REGION	41
III. JIANGSU REGION	41
VI. OTHER REGIONS	42
SECTION 6 ANALYSIS ON MAIN PROBLEMS IN THE DEVELOPMENT OF CHINA ' S COMPLEX FERTILIZER INDUSTRY IN 2008	42
I. NEGATIVE FACTORS HIGHLIGHT INTENSIVELY AND THE CRISIS OF CHINA ' S COMPLEX FERTILIZER INDUSTRY IS WORSENERD	42
II. PROBLEMS THAT THE DEVELOPMENT OF CHINA ' COMPOUND FERTILIZER INDUSTRY FACES	43
CHAPTER 8 IMPORT AND EXPORT OF CHINA ' S COMPLEX FERTILIZER IN 2008	44
SECTION 1 IMPORT AND EXPORT OF CHINA ' S COMPLEX FERTILIZER INDUSTRY IN 2008	44
I. IMPORT OF 2008 CHINA ' S COMPLEX FERTILIZER	44
II. EXPORT OF 2008 CHINA ' S COMPLEX FERTILIZER	45
SECTION 2 IMPORT AND EXPORT PRICE CHANGES OF CHINA ' S COMPLEX FERTILIZER INDUSTRY IN 2008	46
I. AVERAGE IMPORT PRICE	46
II. AVERAGE EXPORT PRICE	47
SECTION 3 IMPORT AND EXPORT AREA OF CHINA ' S COMPLEX FERTILIZER INDUSTRY IN 2008	48
I. IMPORT AND EXPORT AREA OF 2008 CHINA ' S COMPLEX FERTILIZER	48
II. IMPORT ORIGIN OF 2008 CHINA ' S COMPLEX FERTILIZER	48

CHAPTER 9 SEGMENT MARKET OF CHINA ' S COMPLEX FERTILIZER IN 2008	49
SECTION 1 DEVELOPMENT OF CHINA ' S NITRO-COMPLEX FERTILIZER IN 2008	49
I. PRODUCTION AND MARKET OF CHINA ' S NITRO-COMPLEX FERTILIZER	49
II. PRODUCTION TECHNOLOGY DEVELOPMENT OF CHINA ' S NITRO-COMPLEX FERTILIZER	50
SECTION 2 DEVELOPMENT OF CHINA ' S UREA-BASED COMPLEX FERTILIZER IN 2008	50
I. MARKET ANALYSIS OF CHINA ' S UREA-BASED COMPLEX FERTILIZER	50
II. ANALYSIS ON PRODUCTION TECHNOLOGY DEVELOPMENT OF CHINA ' S UREA-BASED COMPLEX FERTILIZER	51
SECTION 3 DEVELOPMENT OF CHINA ' S SULPHUR-BASED COMPLEX FERTILIZER IN 2008	52
I. ANALYSIS ON PRODUCTION AND MARKET SITUATION OF CHINA ' S SULPHUR-BASED COMPLEX FERTILIZER	52
II. LARGEST SULPHUR-BASED COMPLEX FERTILIZER PRODUCTION BASE OF CHINA CONSTRUCTED BY JINCHANG	53
SECTION 4 ANALYSIS ON DEVELOPMENT OF OTHERS COMPLEX FERTILIZER IN 2008	53
I. ANALYSIS ON DEVELOPMENT OF HIGH-NITROGEN COMPLEX FERTILIZER	53
II. ANALYSIS ON DEVELOPMENT OF WEEDING COMPLEX FERTILIZER	54
CHAPTER 10 DEVELOPMENT OF CHINA ' S COMPLEX FERTILIZER ENTERPRISES IN 2008	54
SECTION 1 DEVELOPMENT OF 2008 CHINA ' S COMPLEX FERTILIZER ENTERPRISES IN 2008	54
I. COMPLEX FERTILIZER ENTERPRISES GO TOWARDS THE EDGE OF LOSS IN 2008	54
II. TOWER COMPLEX FERTILIZER ENTERPRISES MINGLED HOPE AND FEAR	55
SECTION 2 DEVELOPMENT AND SITUATION OF CHINESE COMPLEX FERTILIZER ENTERPRISES IN 2008	57
I. TRANSFORMATION OF COMPLEX FERTILIZER ENTERPRISES IN TIME IN 2008	57
II. CO-EXISTENCE OF OPPORTUNITY AND CHALLENGE IN CHINESE COMPLEX FERTILIZER ENTERPRISES IN THE SECOND HALF YEAR OF 2008	57
SECTION 3 PROBLEMS OF CHINESE COMPLEX FERTILIZER ENTERPRISES IN 2008	58
SECTION 4 DEVELOPMENT STRATEGY OF CHINESE COMPLEX FERTILIZER ENTERPRISES IN 2008	58
I. TO CREATE VALUE BY CONTINUOUSLY DEVELOPING NEW PRODUCTS	58

II. TO BUILD REASONABLE PRODUCT STRUCTURE	59
III. TO ESTABLISH INDUSTRIAL CHAIN ADVANTAGE	59
CHAPTER 11 MAIN PRODUCTION TECHNOLOGY OF CHINESE COMPLEX FERTILIZER IN 2008	60
SECTION 1 PRODUCTION METHOD OF CHINESE COMPREHENSIVE PARTICLE COMPOUND FERTILIZER IN 2008	60
I. SLURRY METHOD	60
II. SOLID AGGLOMERATING GRANULATION PROCESS	61
III. PARTIAL SLURRY METHOD	62
IV. MELTING PROCESS	62
V. BLENDING PROCESS	62
VI. SQUEEZING PROCESS	63
SECTION 2 PRODUCTION TECHNOLOGY OF CHINESE COMPLEX FERTILIZER IN 2008	63
SECTION 3 MAIN PROBLEMS IN THE PRODUCTION OF CHINESE COMPLEX FERTILIZER IN 2008	65
I. IMPORTED LARGE AND MEDIUM-SIZED PRODUCTION EQUIPMENT FOR AMMONIUM PHOSPHATE AND COMPLEX FERTILIZER BY ADOPTING SLURRY METHOD	65
II. PRINCIPLE PROBLEMS IN PRODUCTION OF ENTERPRISES ENGAGING IN THE SECONDARY PROCESSING OF FERTILIZER	66
III. PRODUCTION TECHNOLOGY AND TECHNOLOGICAL TRANSFORMATION OF CARBAMIDE-BASED COMPLEX FERTILIZER	69
CHAPTER 12 ANALYSIS ON THE COMPETITION OF CHINA COMPLEX FERTILIZER INDUSTRY IN 2008	70
SECTION 1 ANALYSIS ON THE COMPETITIVE POSTURE OF CHINA COMPLEX FERTILIZER INDUSTRY IN 2008	70
SECTION 2 SWOT ANALYSIS ON CHINA FERTILIZER INDUSTRY IN 2008	71
SECTION 3 ANALYSIS ON THE COMPETITIVE STRATEGY SELECTION OF CHINA ' S COMPLEX FERTILIZER ENTERPRISES IN 2008	74
I. OVERALL COST LEADERSHIP STRATEGY	74
II. DIFFERENTIATION STRATEGY	75
III. FOCUS STRATEGY	75
CHAPTER 13 ANALYSIS ON THE DEVELOPMENT STRATEGIES OF KEY ENTERPRISES OF	

CHINA ' S COMPLEX FERTILIZER INDUSTRY IN 2008	76
SECTION 1 SHANDONG LUBEI ENTERPRISE GROUP GENERAL COMPANY	76
I. ENTERPRISE INTRODUCTION	76
II. KEY ECONOMIC INDEXES AND PROFITABILITY	76
III. ENTERPRISE ASSET-LIABILITY INDEX	77
VI. STRUCTURE OF ENTERPRISE COSTS AND EXPENSES	78
V. ANALYSIS ON ENTERPRISE COMPETITIVENESS	79
SECTION 2 LUXI CHEMICAL	79
I. ENTERPRISE INTRODUCTION	79
II. KEY ECONOMIC INDEXES AND PROFITABILITY	79
III. ENTERPRISE ASSET-LIABILITY INDEX	80
VI. STRUCTURE OF ENTERPRISE COSTS AND EXPENSES	81
V. ANALYSIS ON ENTERPRISE COMPETITIVENESS	82
SECTION 3 HECHI CHEMICAL	82
I. ENTERPRISE INTRODUCTION	82
II. KEY ECONOMIC INDEXES AND PROFITABILITY	82
III. ENTERPRISE ASSET-LIABILITY INDEX	83
VI. STRUCTURE OF ENTERPRISE COSTS AND EXPENSES	84
V. ANALYSIS ON ENTERPRISE COMPETENCE	84
SECTION 4 HUBEI YIHUA CHEMICAL INDUSTRY CO., LTD.	85
I. ENTERPRISE INTRODUCTION	85
II. KEY ECONOMIC INDEXES AND PROFITABILITY	85
III. ENTERPRISE ASSET-LIABILITY INDEX	86
VI. STRUCTURE OF ENTERPRISE COSTS AND EXPENSES	87
V. ANALYSIS ON ENTERPRISE COMPETITIVENESS	87
SECTION 5 BATIAN COMPANY	87
I. ENTERPRISE INTRODUCTION	88
II. KEY ECONOMIC INDEXES AND PROFITABILITY	88
III. ENTERPRISE ASSET-LIABILITY INDEX	89
VI. STRUCTURE OF ENTERPRISE COSTS AND EXPENSES	90
V. ANALYSIS ON ENTERPRISE COMPETITIVENESS	90
SECTION 6 SHANGDONG HUAFENG-STANLEY FERTILIZER STOCK CO., LTD.	90

I. ENTERPRISE INTRODUCTION	90
II. KEY ECONOMIC INDEXES AND PROFITABILITY	90
III. ENTERPRISE ASSET-LIABILITY INDEX	91
VI. STRUCTURE OF ENTERPRISE COSTS AND EXPENSES	92
V. ANALYSIS ON ENTERPRISE COMPETITIVENESS	93
SECTION 7 SINO-ARAB CHEMICAL FERTILIZERS COMPANY LIMITED (SACF)	93
I. ENTERPRISE INTRODUCTION	93
II. KEY ECONOMIC INDEXES AND PROFITABILITY	94
III. ENTERPRISE ASSET-LIABILITY INDEX	94
VI. STRUCTURE OF ENTERPRISE COSTS AND EXPENSES	95
V. ANALYSIS ON ENTERPRISE COMPETITIVENESS	95
CHAPTER 14 ANALYSIS ON DEVELOPMENT TREND OF CHINA ' S COMPLEX FERTILIZER FROM 2009 TO 2012	97
SECTION 1 ANALYSIS ON ACTIVITIES OF CHINA ' S COMPLEX FERTILIZER INDUSTRY FROM 2009 TO 2012	97
I. LONG-EFFECT COMPLEX FERTILIZER HAS A BRIGHT DEVELOPMENT PROSPECT	97
II. WEEDING COMPLEX FERTILIZER HAS A PROMISING APPLICATION PROSPECT	98
III. HIGH-NITROGEN COMPLEX FERTILIZER HAS A BROAD MARKET PROSPECT	99
VI. UREA-BASED COMPLEX FERTILIZER HAS A BROAD DEVELOPMENT PROSPECT	100
SECTION 2 ANALYSIS ON DEVELOPMENT TREND OF CHINA ' S COMPOUND FERTILIZER INDUSTRY FROM 2009 TO 2012	101
I. ANALYSIS ON THE INDUSTRIAL RATIONALIZATION	101
II. ANALYSIS ON EMPLOYMENT SPURRED BY THE INDUSTRY	102
III. ANALYSIS ON THE DEVELOPMENT DIRECTION OF THE INDUSTRY	102
SECTION 3 ANALYSIS ON MARKET SITUATION OF CHINA ' S COMPLEX FERTILIZER INDUSTRY FROM 2009 TO 2012	103
I. ANALYSIS ON DEMAND FORECAST OF CHINA ' S COMPLEX FERTILIZER FROM 2009 TO 2012	103
II. ANALYSIS ON SUPPLY FORECAST OF CHINA ' S COMPLEX FERTILIZER FROM 2009 TO 2012	103
III. ANALYSIS ON PRICE FORECAST OF CHINA ' S COMPLEX FERTILIZER FROM 2009 TO 2012	105

VI. ANALYSIS ON IMPORT AND EXPORT FORECAST OF CHINA ' S COMPLEX FERTILIZER FROM 2009 TO 2012	105
CHAPTER 15 ANALYSIS ON THE INVESTMENT PROSPECT AND POLICY OF CHINA ' S COMPOUND FERTILIZER INDUSTRY FROM 2009 TO 2012	106
SECTION 2 ANALYSIS ON THE INVESTMENT RISK OF CHINA ' S COMPOUND FERTILIZER INDUSTRY FROM 2009 TO 2012	107
I. MARKET RISK	107
II. RAW MATERIAL RISK	108
III. PRICE RISK	108
VI. POLICY AND SYSTEM RISK	109
V. COMPETITION RISK	109
SECTION 3 ANALYSIS ON THE DEVELOPMENT OF CHINA ' S SULFUR-BASED COMPOUND FERTILIZER INDUSTRY FROM 2009 TO 2012	110
SECTION 4 ANALYSIS ON THE CAUSES AND COUNTERMEASURES OF “ GETTING MILDEW ” OF CHINA ' S HIGH NITROGEN COMPOUND FERTILIZER	112
I. PHENOMENON OF “ GETTING MILDEW ” OF HIGH NITROGEN COMPOUND FERTILIZER	112
II. ANALYSIS ON THE COMPONENTS OF THE ACEROSE SUBSTANCE	112
III. ANALYSIS ON THE CAUSES OF THE PHENOMENON OF “ GETTING MILDEW ” OF HIGH NITROGEN COMPOUND FERTILIZER	112
VI. INFLUENCE OF THE SOLUBILITY OF THE SALTS ON THE PHENOMENON OF “ GETTING MILDEW ” OF HIGH NITROGEN COMPOUND FERTILIZER	113
V. MEASURES FOR PREVENTION OF THE “ GETTING MILDEW ” OF THE COMPOUND FERTILIZER	113
SECTION 5 ANALYSIS ON THE STRATEGIES FOR THE DEVELOPMENT OF CHINA ' S COMPOUND FERTILIZERS FROM 2009 TO 2012	114
SECTION 6 EXPERT SUGGESTIONS FROM HUAJING VIEWPOINT RESEARCH CENTER	116

Graph List

Graph 11 Statistics on NPK Output of 66 Key Enterprises in China in 2008 (physical quantity, ten thousand tons)	36
Graph 12 Import Volume of Complex Fertilizer of China from 2004 to June, 2008	47

- Graph 13 Export Volume of Complex Fertilizer of China from 2004 to the June of 2008 48
- Graph 14 Import Volume and Average Import Price of Complex Fertilizer of China in Every Month of the First Half Year of 2008 48
- Graph 15 Export Volume and Average Export Price of Complex Fertilizer of China in Every Month of the First Half Year of 2008 49
- Graph 16 Main Economic Indexes and Growths of Shandong Lubei Enterprise Group General Company in 2006-2007 79
- Graph 17 Main Profitability Indexes of Shandong Lubei Enterprise Group General Company in 2006-2007 79
- Graph 18 Financial Position Statement of Shandong Lubei Enterprise Group General Company in 2006-2007 80
- Graph 19 Asset-Liability Bearing Ability Indexes of Shandong Lubei Enterprise Group General Company in 2006-2007 80
- Graph 20 Cost and Expense Indexes of Shandong Lubei Enterprise Group General Company in 2006-2007 80
- Graph 21 Main Economic Indexes and Growths of Shandong Liaocheng Luxi Chemical Second Fertilizer Co., Ltd. in 2006-2007 82
- Graph 22 Main Profitability Indexes of Shandong Liaocheng Luxi Chemical Second Fertilizer Co., Ltd. in 2006-2007 82
- Graph 23 Financial Position Statement of Shandong Liaocheng Luxi Chemical Second Fertilizer Co., Ltd. in 2006-2007 82
- Graph 24 Asset-Liability Bearing Ability Indexes of Shandong Liaocheng Luxi Chemical Second Fertilizer Co., Ltd. in 2006-2007 83
- Graph 25 Cost and Expense Indexes of Shandong Liaocheng Luxi Chemical Second Fertilizer Co., Ltd. in 2006-2007 83
- Graph 26 Main Economic Indexes and Growths of Guangxi Hechi Chemical Industry Group Company in 2006-2007 85
- Graph 27 Main Profitability Indexes of Guangxi Hechi Chemical Industry Group Company in 2006-2007 85
- Graph 28 Financial Position Statement of Guangxi Hechi Chemical Industry Group Company in 2006-2007 85
- Graph 29 Asset-Liability Bearing Ability Indexes of Guangxi Hechi Chemical Industry Group Company

in 2006-2007 86

Graph 30 Cost and Expense Indexes of Guangxi Hechi Chemical Industry Group Company in 2006-2007 86

Graph 31 Economic Indexes and Growths of Hubei Yihua Group Co., Ltd. in 2006-2007 Main 87

Graph 32 Main Profitability Indexes of Hubei Yihua Group Co., Ltd. in 2006-2007 88

Graph 33 Financial Position Statement of Hubei Yihua Group Co., Ltd. in 2006-2007 88

Graph 34 Asset-Liability Bearing Ability Indexes of Hubei Yihua Group Co., Ltd. in 2006-2007 89

Graph 35 Cost and Expense Indexes of Hubei Yihua Group Co., Ltd. in 2006-2007 89

Graph 36 Main Economic Indexes and Growths of Xuzhou Batian Ecology Co., Ltd. in 2006-2007 90

Graph 37 Main Profitability Indexes of Xuzhou Batian Ecology Co., Ltd. in 2006-2007 90

Graph 38 Financial Position Statement of Xuzhou Batian Ecology Co., Ltd. in 2006-2007 91

Graph 39 Asset-Liability Bearing Ability Indexes of Xuzhou Batian Ecology Co., Ltd. in 2006-2007 91

Graph 40 Cost and Expense Indexes of Xuzhou Batian Ecology Co., Ltd. in 2006-2007 Unit: 1,000 yuan 92

Graph 41 Main Economic Indexes and Growths of Stanley Fertilizer Co., Ltd. in 2006-2007 93

Graph 42 Main Profitability Indexes of Stanley Fertilizer Co., Ltd. in 2006-2007 93

Graph 43 Financial Position Statement of Stanley Fertilizer Co., Ltd. in 2006-2007 93

Graph 44 Asset-Liability Bearing Ability Indexes of Stanley Fertilizer Co., Ltd. in 2006-2007 94

Graph 45 Cost and Expense Indexes of Stanley Fertilizer Co., Ltd. in 2006-2007 94

Graph 46 Main Economic Indexes and Growths of SACF in 2006-2007 96

Graph 47 Main Profitability Indexes of SACF in 2006-2007 96

Graph 48 Financial Position Statement of SACF in 2006-2007 96

Graph 49 Asset-Liability Bearing Ability Indexes of SACF in 2006-2007 97

Graph 50 Cost and Expense Indexes of SACF in 2006-2007 97

Graph 51 Output Statistics of 66 Key Complex Fertilizer Enterprises in China 105

Catalog chart: . . .

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三、研究方法

- 1、系统分析方法
- 2、比较分析方法
- 3、具体与抽象方法
- 4、分析与综合方法
- 5、归纳与演绎方法
- 6、定性分析与定量分析方法
- 7、预测研究方法

四、数据来源

对行业内相关的专家、厂商、渠道商、业务（销售）人员及客户进行访谈，获取最新的一手市场资料；

艾凯咨询集团长期监测采集的数据资料；

行业协会、国家统计局、海关总署、国家发改委、工商总局等政府部门和官方机构的数据与资料；

行业公开信息；

行业企业及上、下游企业的季报、年报和其它公开信息；

各类中英文期刊数据库、图书馆、科研院所、高等院校的文献资料；

行业资深专家公开发表的观点；

对行业的重要数据指标进行连续性对比，反映行业发展趋势；

中华人民共和国国家统计局 <http://www.stats.gov.cn>

中华人民共和国国家工商行政管理总局 <http://www.saic.gov.cn>

中华人民共和国海关总署 <http://www.customs.gov.cn>

中华人民共和国商务部 <http://www.mofcom.gov.cn>

中国证券监督管理委员会 <http://www.csrc.gov.cn>

中华人民共和国商务部 <http://www.mofcom.gov.cn>

世界贸易组织 <https://www.wto.org>

联合国统计司 <http://unstats.un.org>

联合国商品贸易统计数据库 <http://comtrade.un.org>

五、关于艾凯咨询网

艾凯咨询网（www.icandata.com）隶属艾凯咨询集团（北京华经艾凯企业咨询有限公司），艾凯咨询集团专注提供大中华区产业经济情报，为企业商业决策赋能，是领先的市场研究报告和竞争情报提供商

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研究力量

高素质的专业的研究分析团队，密切关注市场最新动向。在多个行业，拥有数名经验丰富的专业分析师。对于特定及专属领域，我们有国内外众多合作研究机构，同时我们聘请数名行业资深专家顾问，帮助客户分清市场现状和趋势，找准市场定位和切入机会，提出合适中肯的建议，帮助客户实现价值，与客户一同成长。

我们的优势

权威机构 艾凯咨询集团二十年深厚行业背景;
数量领先 囊括主流研究报告和权威合作伙伴;
服务齐全 促销、推荐指数、积分、网上支付等;
良好声誉 广泛知名度、满意度，众多新老客户。