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

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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!

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3、具体与抽象方法

4、分析与综合方法

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6、定性分析与定量分析方法

7、预测研究方法

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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

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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。

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