



艾凯咨询  
ICAN Consulting

# 预售：China Fertilizer Market Review

# 一、调研说明

《预售：China Fertilizer Market Review》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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报告价格：纸介版9000元 电子版9000元 纸介版+电子版9200元

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## 二、摘要、目录、图表

[ Description ]

China maintained a rapid economic growth in 2006 under the national macro-control policy, the first year of the 11th Five-Year Period (2006~2010) of the national economic development. A series of policies for economic development, including objectives, key points of growth and directions of structural readjustment, have been worked out.

The 11th Five-Year Plan for the Chinese Economic And Social Development, promulgated in March, 2006, requires that per unit GDP energy consumption and pollution discharge be reduced by 20% and 10% in five years against the backdrop of an expected annual 7.5% GDP growth. This poses a new challenge to the fertilizer industry because it is one of the industries with high energy consumption and high pollution discharge. The policy is expected to bring about a new round of technical innovation, distribution of production and product-mix readjustment in the fertilizer industry. How will the new round of restructuring be carried out?

The 11th Five-Year Plan for National Agricultural & Rural Economic Development, promulgated in Aug., 2006, sets up a goal of annual 0.65% increase in comprehensive grain productive capacity in five years under the condition of annual 0.18% decrease in planted grain acreage. Then how will the fertilizer industry step up fertilizer supply, improve its product-mix, improve fertilizing technology and raise fertilizer utilization to ensure the accomplishment of grain production goals?

The 11th Five-Year Plan for the Fertilizer Industry, promulgated in Oct., 2006, puts forward a fertilizer productive capacity of 63.5 million MT and a production of 60 million MT a year by 2010 in order to guarantee fertilizer supply. The specific goals of nitrogen, phosphorus and potassium production are 42 million MT, 15 million MT and 3 million MT respectively. Domestic fertilizer self-sufficiency should reach 90%, that is, basic self-sufficiency of nitrogen and phosphorus supply and 30% of potassium supply. How will the fertilizer industry readjust its distribution of production and product-mix and what steps will it take in technical innovation to attain the industry ' s development goals?

The conflict between the government ' s policy to practice macro-control and the policy of increasing farmers ' income and the conflict between fertilizer price growth and government ' s control remained unsettled in 2006. Farmers ' and fertilizer producers ' complaints led to a government decision to lift fertilizer price control, withdraw preference policies for fertilizer producers and give direct cash subsidy to farmers from 2007 on. But fertilizer production cost keeps increasing on account of the reform of coal, power and natural gas price toward market economy. Owing to this, there was a tendency of declining profit margin in the fertilizer industry in late 2006. Therefore, how the government reforms its policies will have great impact on fertilizer production and fertilizer market trend in 2007.

On the basis of thorough review and analysis of government ' s fertilizer policies and market trend in 2006, taking into account of national economic move and overall policy reform, BOABC will make an in-depth analysis of the problems facing the fertilizer market in 2007 and draw reasonable conclusions, so as to provide a reference to people concerned about China ' s fertilizer market.

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## 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>

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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>

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联合国商品贸易统计数据库 <http://comtrade.un.org>

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艾凯咨询网（[www.icandata.com](http://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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