

# **China Phosphorus Industry Market Report 2016**

**The Second Edition**

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## 1. Introduction

This report is written based on phosphorus industry chain through arrangement of phosphorus data from CCM's database, which mainly includes production, price and import & export data of major phosphorus products (phosphorus ore, phosphate fertilizer and yellow phosphorus) in China to tell you their market dynamics in the past three to five years, and bring you important reference information for your decision.

In recent years, phosphorus market is in poor situation at home and abroad. In 2013-Sept. 2016, China's price of phosphorus ore was on a downtrend on the whole. China's price of yellow phosphorus has been witnessing downtrend. Even the export volume of China's phosphorus ore has witnessed a downtrend during 2012-2015.

Nevertheless, China still produces lots of phosphorus ore and products as a large phosphorus supplier in the world.

To stimulate phosphorus downstream market demand, China has decreased the export tariff on phosphorus ore from 35% in 2015 to 20% in 2016. In 2015, foreign buyers did not need to pay more tariffs for importing phosphate fertilizers in China during China's booming season of phosphate fertilizers according to the *2015 Tariff Implementation Plan* issued by the Ministry of Finance of China. That is a driving factor for China's phosphorus products export.

How is China's phosphorus market going on currently? More detailed information of phosphorus market in China has been unfolded in the report as the following aspects,

- ✓ Reserves of phosphorus ore at home and abroad
- ✓ Output of phosphorus ore in China and some foreign countries, 2011-2015
- ✓ Price of phosphorus ore in China, 2011-Sept. 2016
- ✓ Export of phosphorus ore in China, 2012-Aug. 2016
- ✓ Output of phosphate fertilizers in China, 2011-2015
- ✓ Price of phosphate fertilizers in China, 2014-March 2016
- ✓ Export of phosphate fertilizers in China, 2012-Aug. 2016
- ✓ Capacity and output of yellow phosphorus in China, 2011-H1 2016
- ✓ Price of yellow phosphorus in China, 2011-Aug. 2016
- ✓ Export of yellow phosphorus, 2011-H1 2016
- ✓ Key phosphorus producers in China, 2015

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## 2. Approach for the report

The report is drafted by diverse methods and sources as follows:

✓ CCM database

Data in the report are mainly from CCM's database. The data in CCM's database were sourced from:

- Published articles from periodicals, magazines and journals, the third-party database
- Statistics from governments and international institutes
- Telephone interviews with domestic producers, joint ventures, service suppliers, government
- Third-party data providers
- Comments from industrial experts
- China Customs
- Professional database in other sources
- Information from the Internet

The data from various channels have been combined to make data as precise and scientific as possible. Throughout the process, a series of internal discussions took place in order to analyze the data and draw conclusions from it.

✓ Desk research

Desk research for this report is mainly to do cross check for the data in this report and determine the report content. The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, association seminars as well as information from the Internet. A lot of work has gone into compiling and analyzing the data and information obtained.

✓ Telephone interviews

To understand China's phosphorus market better, CCM did telephone interviews with manufacturers, data suppliers, researchers, associations and governments.

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### 3. Executive summary

In recent years, both China and the world's phosphorus ore output are on the increase though global phosphorus market is still in a poor situation generally. In 2011-2015, the global output of phosphorus ore has risen from XXXX million tonnes to XXXX million tonnes at a CAGR of XXXX. And the output of phosphorus ore in China has grown from XXXX tonnes in 2011 to XXXX tonnes in 2015, at a CAGR of XXXX.

Global phosphorus ore is mainly located in Morocco and Western Sahara, while China's phosphorus ore is mostly distributed in Yunnan, Guizhou, Sichuan, Hubei, Henan, Hunan, Guangdong and Hainan provinces, and Guangxi Zhuang Autonomous Region.

With abundant phosphorus resources, China not only offers a large amount of phosphorus ore to domestic phosphorus market, but also exports lots of phosphorus ore to other countries.

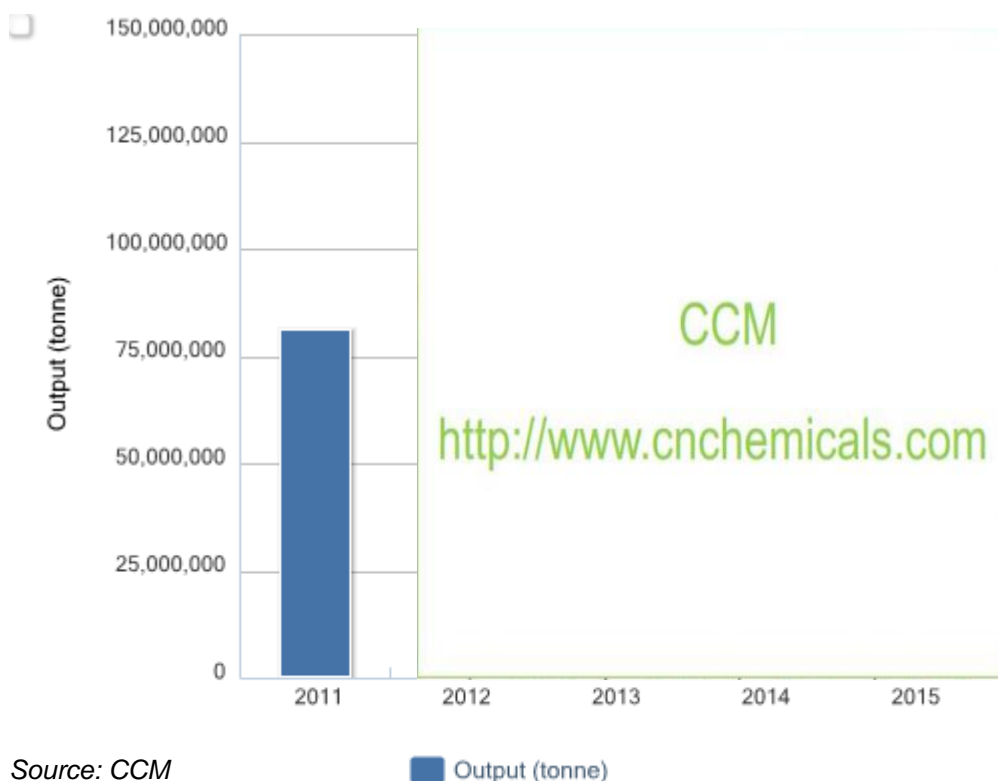
Currently, phosphorus market is weak and phosphorus products (including phosphate fertilizers and yellow phosphorus) are on the decline in ex-works price.

As a large phosphorus country, China has many phosphorus producers mainly distributed in Hubei, Yunnan, Guizhou provinces, etc. which are abundant in phosphorus ore reserves.

#### 4. What is in the report?

In recent years, China's output of phosphorus ore keeps increasing. It has grown from 81,223,000 tonnes in 2011 to 142,037,000 tonnes in 2015, at a CAGR of nearly 15%. Hubei, Guizhou, Yunnan and Sichuan provinces are large production regions of phosphorus ore in China by output currently. The total output of phosphorus ore in these four regions accounted for more than 97% of the national total in 2015.

Figure 1.2.2-1 Output of phosphorus ore in China, 2011-2015



Source: CCM

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Table 2.1-1 Top 15 phosphate fertilizer regions in China by output, 2015

No.	Region	Output, tonne
1	Hubei Province	XXXX
2	XXXX Province	XXXX
3	XXXX Province	XXXX
...	...	...
14	XXXX Province	XXXX
15	XXXX Province	XXXX

Source: CCM

...

Table 4-1 Distribution of phosphorus ore producers in China, 2015

No.	Region	Number of phosphorus ore producers
1	Hubei Province	XXXX
2	Yunnan Province	XXXX
3	Guizhou Province	XXXX
4	Sichuan Province	XXXX
5	Anhui Province	XXXX
6	Hunan Province	XXXX
7	Hebei Province	XXXX
8	Liaoning Province	XXXX
9	Jiangsu Province	XXXX
10	Fujian Province	XXXX
11	Henan Province	XXXX
12	Chongqing City	XXXX
13	Shaanxi Province	XXXX
<b>Total</b>		XXXX

Source: CCM

...

Table 4-5 List of major phosphate fertilizer producers in China, 2015

No.	Company	Abbreviation	Location
1	Yuntianhua Group Co., Ltd.	Yuntianhua	Yunnan Province
2	XXXX	XXXX	XXXX
3	XXXX	XXXX	XXXX
4	XXXX	XXXX	XXXX
5	XXXX	XXXX	XXXX
6	XXXX	XXXX	XXXX
7	XXXX	XXXX	XXXX
8	XXXX	XXXX	XXXX
9	XXXX	XXXX	XXXX
10	XXXX	XXXX	XXXX

Source: CCM

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