

Note: Key data/information in these pages is hidden, while it is not in the report.

1 Summary of global trade

1.1 Overview of the global trade

Globally, Kazakhstan, Vietnam, China and the US are the major exporters of yellow phosphorus, whose export volume accounts for about XX% of the world's total trade volume in 2011, while Germany, Japan, Poland, Brazil and India are the top import countries, sharing about XX% of the total import volume.

Because yellow phosphorus is not easy to be transported and stored, its flow is mainly limited between production countries and their neighboring countries. For example, Chinese yellow phosphorus mainly flows to Japan, while Kazakhstan's yellow phosphorus mainly flows to the EU countries. Besides, the main export origins have already changed from developed countries to developing countries, where the production cost of yellow phosphorus is much lower than that in the developed countries.

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Table 1.1-1 Export situation of yellow phosphorus by country, 2011

Country	Export volume, tonne	Ratio
Kazakhstan	XXX	XXX
Vietnam	XXX	XXX
China	XXX	XXX
The US	XXX	XXX
The Netherlands	XXX	XXX
Others	3,000	2.89%
Total	XXX	XXX

Source: CCM and UN comtrade

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2 Import & export analysis

2.1 Import analysis

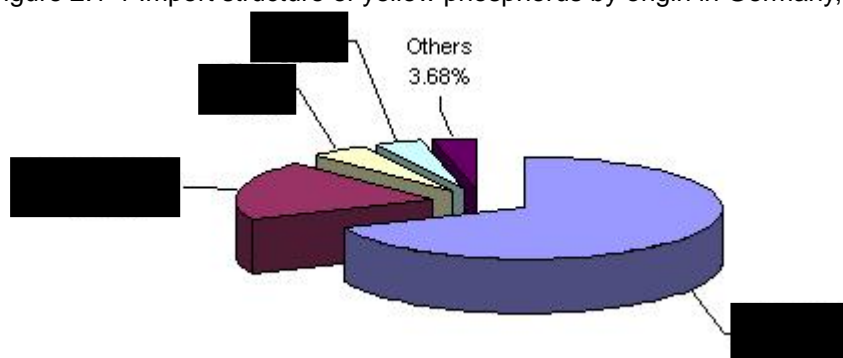
CCM International analyzes the importing countries which have import volume of yellow phosphorus more than XXX tonnes in 2011. Germany, XXX, XXX, XXX and XXX are included.

- Germany

With no domestic yellow phosphorus producers, Germany is the largest importer by volume, about XXX tonnes, in 2011. XXX and the XXX are its most important suppliers in 2011, with the

import volume of XXX tonnes and XXX tonnes respectively. The import volume from China decreased from XXX tonnes in 2008 to XXX tonnes in 2011, mainly because of the high yellow phosphorus price and the relatively long distance. Germany dismissed its one-to-one trading relationship with XXX and turned to XXX, making the unique yellow phosphorus producer in XXX, XXX, face bankruptcy. The market share of XXX phosphorus is going to increase in the coming years in Germany. The average import price of yellow phosphorus in Germany is USDXXX/t in 2011.

Figure 2.1-1 Import structure of yellow phosphorus by origin in Germany, 2011



Source: CCM and UN Comtrade

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3 Main influencing factors for global trade of yellow phosphorus

3.1 Policies and local development

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Table 3.1-1 Changes of export tariff and export rebate for yellow phosphorus in China, 2002-2012

Starting time	Export tariff	Export rebate
2002	0.00%	15.00%
2004	0.00%	8.00%
Jan. 2005	10.00%	0.00%
June 2005	20.00%	0.00%
May. 2008	XX%	0.00%
Dec. 2008	XX%	0.00%
Jan. 2009	XX%	0.00%
July 2009	XX%	0.00%

Note: The export tariff has kept XX% since July 2009.

Source: CCM

3.2 Logistics

As is known to all, yellow phosphorus is a kind of inflammable hazardous chemical product. So its transportation must be under extremely strict control and the methods about conveying yellow phosphorus are highly standardized. After dozens of years of evolution, there are two main packages for yellow phosphorus, drum and ISO tank.

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Table 3.2-1 Percentage of yellow phosphorus transported in drum, 2011

Main export country	Domestic transaction in drum	Export transaction in drum
China	XX%	XX%
Kazakhstan	XX%	XX%
The Netherlands	XX%	XX%
The US	XX%	XX%
Vietnam	XX%	XX%

Source: CCM