

Market Research on China Phosphorus Industry

The Fourth Edition

Nov. 2019

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1. Introduction

Market Research on China Phosphorus Industry, finished in November 2019, is CCM's fourth edition report on China's phosphorus industry. This intelligent report attaches importance to the following parts:

- Global phosphate rock reserves and output.
- China's phosphate rock reserves, output, price and exports.
- China's phosphate fertilizer output, price and exports.
- China's yellow phosphorus capacity, output, price and exports.

2. Approach for this report

This report is based on data collected with diverse methods, which are listed as follows:

Desk research

This includes access to published magazines, journals, government, industry and customs statistics, association seminars as well as information from the Internet. A lot of work has gone into the compilation and analysis of the obtained information. Data collected and compiled are variously sourced from:

- CCM's database
- Published articles from periodicals, magazines, journals, and third party database.
- Statistics from governments and international institutes
- Customs statistics
- Comments from industrial experts on various platforms
- Information from the Internet

Telephone interview targets

- Key producers
- Key traders
- Industrial associations
- Industrial experts

Data compilation and crosscheck

Data obtained from various sources have been combined and cross-checked to ensure that this report is as accurate and methodologically sound as possible.

3. Executive summary

Global output of phosphate rock was in an upward trend during 2012–2018, growing at a CAGR of XXX. As to China, its output of phosphate rock increased during 2012–2016, but it decreased by more than XXX year on year during 2017–2018 due to exploitation restriction to protect ecological environment. With the increasingly strict implementation of environmental protection policies in the Yangtze River Economic Belt in 2018, production of phosphate rock was restricted, yet market demand for the product rose, and so the price continued rising.

The phosphate rock reserves beyond China are mainly distributed in Morocco and Western Sahara. In China, the phosphate rock reserves are mainly distributed in Hubei, Yunnan, Guizhou, Hunan, and Sichuan provinces.

As a key phosphate fertilizer supplier in the world, China exported a large quantity of phosphate fertilizers every year. In 2018, China's export volume of MAP and DAP were about XXX tonnes and XXX tonnes respectively.

Ex-works price of MAP in China showed a downward trend with fluctuations during 2018–H1 2019 due to sluggish downstream demand and drops in raw materials' prices. From 2018–H1 2019, the price of DAP in China dropped slowly due to low downstream demand and oversupply of the product in the market.

Operating rate of yellow phosphorus producers is about XXX in 2018. And then it decreased in H1 2019 due to tightening environmental regulations and pollution control of yellow phosphorus production in Southwest China, where backward production capacity has been eliminated, which will greatly affect the output of yellow phosphorous in 2019.

The decline of yellow phosphorus exports from 2013 to H1 2019 affected the profit level of domestic yellow phosphorus related production producers, thus forcing some small-scale and backward equipment yellow phosphorus production producers to shut down. Ex-works price of yellow phosphorous in China followed a general downward trend during Jan. to Aug. 2018, because the downstream demand was sluggish. During Sept. to Nov. 2018, the price ticked up, mainly owing to increasing production cost.

4. What is in the report?

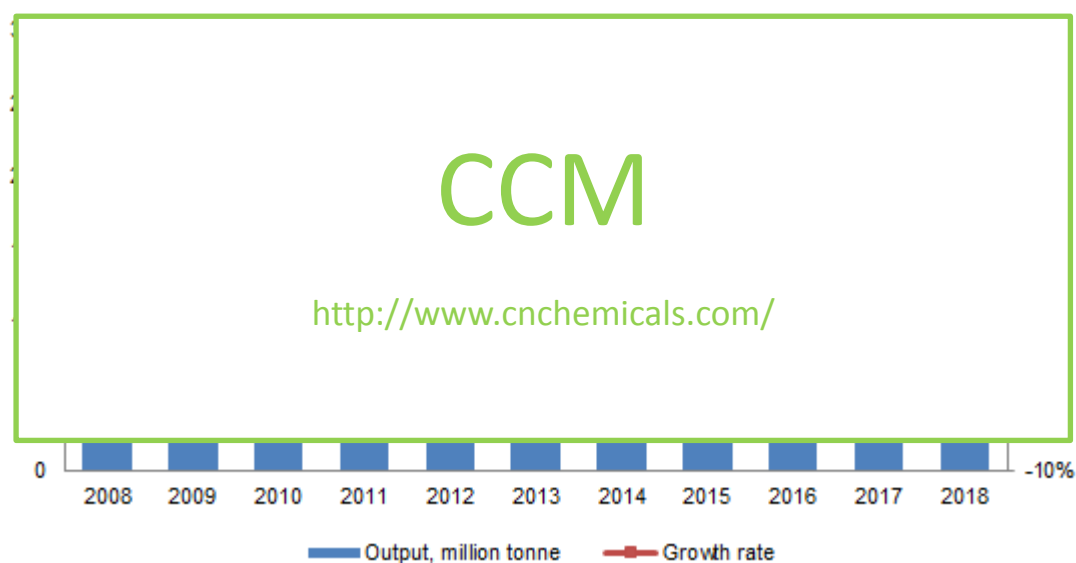
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1.1 Overview of global phosphate rock

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Figure 1.1-1 Global phosphate rock output, 2008–2018



Source: United States Geological Survey (USGS)

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1.2.1 Distribution of phosphate rock reserves, 2018

In 2018, the proven phosphate rock reserves in China were XXX million tonnes. Most of the phosphate rock reserves in China are distributed in Hubei, Yunnan, Guizhou, Hunan, and Sichuan provinces.

Figure 1.2.1-1 Distribution of phosphate rock reserves in China by region, 2018



Source: CCM

Table 1.2.1-1 Average P_2O_5 content of phosphate rock in China by region, 2018

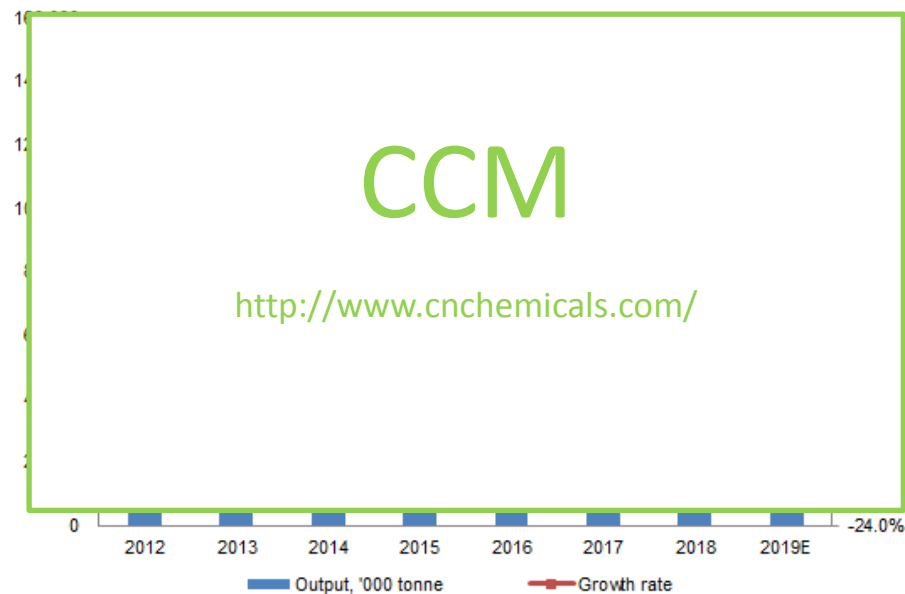
Region	Average P_2O_5 content
Hubei Province	XXX
Guizhou Province	XXX
Yunnan Province	XXX
Sichuan Province	XXX
Hunan Province	XXX

Source: CCM

1.2.2 Output of phosphate rock, 2012–2019E

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Figure 1.2.2-1 Output of phosphate rock in China, 2012–2019E



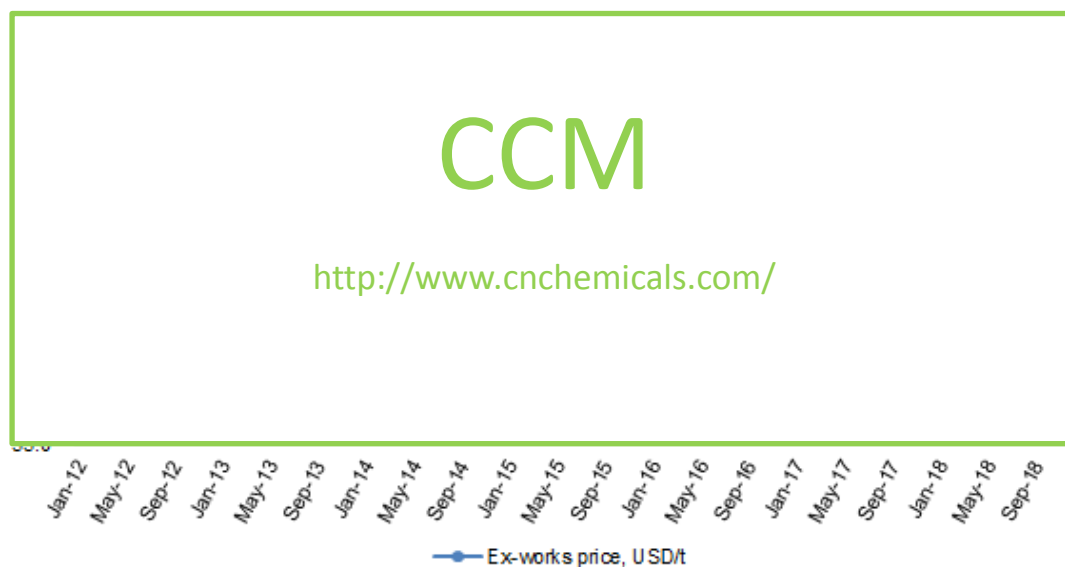
Source: NBS

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1.2.3 Price of phosphate rock, 2012–2018

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Figure 1.2.3-1 Monthly ex-works price of 30% phosphate rock in China, Jan. 2012–Dec. 2018



Source: CCM

2.3 Export analysis of phosphate fertilizers, 2012–2018

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Figure 2.3-2 Monthly exports of monoammonium phosphate (MAP) from China, Jan. 2016–Dec. 2018



Source: China Customs, CCM

Figure 2.3-3 Monthly exports of diammonium phosphate (DAP) from China, Jan. 2016–Dec. 2018



Source: China Customs, CCM

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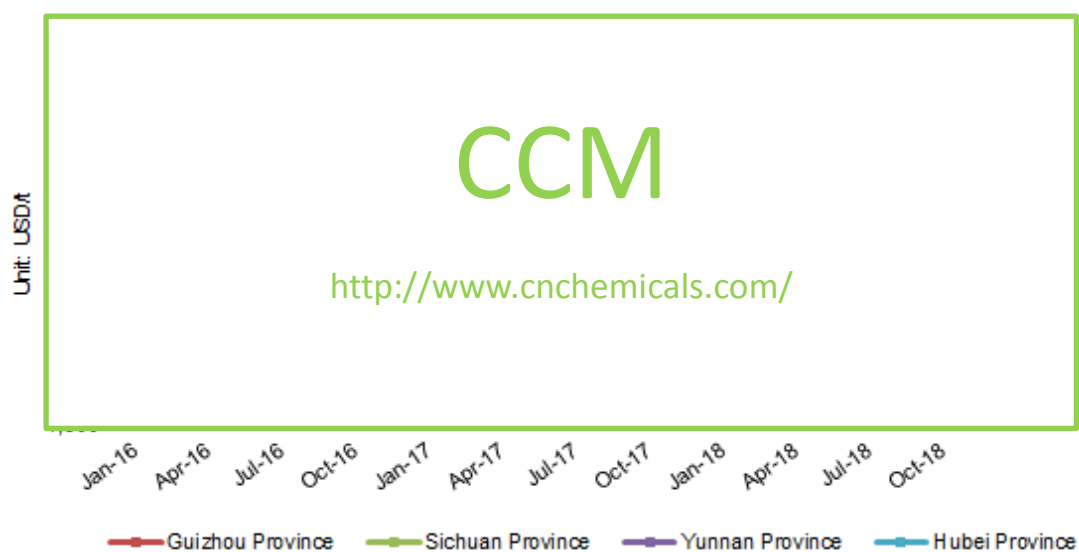
3 Yellow phosphorus in China

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3.1 Price of yellow phosphorus, 2012–2018

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Figure 3.2-2 Monthly ex-works price of yellow phosphorus in China by region, Jan. 2016–Dec. 2018



Source: CCM

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