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Forecast of Integrated Phosphorus Industry in China

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Abstracts

Background:

Global phosphorus resources are decreasing in quantity as well as in quality in recent years. As a large phosphorus country, China, who is blessed with abundant phosphorus resources, is also facing the risk of dying out phosphate rock. Then how long will China's phosphorus resources be available? When will the "Phosphorus Peak" arrive? What will China do to prepare for the up-coming phosphorus peak?

Currently, China's traditional phosphorus market is in intense competition, especially the phosphate fertilizer and yellow phosphorus sectors. The competition not only comes from the tightening supply of phosphate rock, but also the sluggish downstream market demand. That has put many phosphorus enterprises into an embarrassing situation. How can those enterprises stand out amid the intense market competition and what is going to happen in China's phosphorus industry after the peak? In order to answer these questions and offer insight into the Chinese phosphorus industry, CCM has cooperated withPhos4ever to conduct a comprehensive study on these topics. In which, CCM has collected insiders' and experts' views from phosphorus enterprises, official department, and academic institutes through telephone investigation, site visit and in-depth interview. Moreover, CCM has done deep research through import & export analysis, cost analysis, company research, downstream investigation, etc. to unfold the current situation of China's phosphorus industry. At the same time, based on comprehensive quality and quantity analysis, CCM has forecasted China's future phosphorus industry through PEST analysis.

Industrial affairs:

Throat-cutting competition in China's traditional phosphorus industry;

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Integration behaviors are commonly seen in China’s phosphorus industry;

China’s exploitation cost of phosphate rock is increasing;

Quality of phosphate rock in China is on the decline;

Export quota for phosphate rock in China is decreasing

Output of China’s phosphate fertilizers witnessed downtrend in 2013

China has reduced tariff for phosphate fertilizer export

Supply of yellow phosphorus is on the decline in recent years

China’s position:

China is the second largest phosphate rock country in the world, and the largest yellow phosphorus and fertilizer supplier in the world. China plays an important role in the global phosphorus industry.

Purpose of report:

Forecast the phosphorus peak in China’s phosphorus industry;

Forecast future trends and development in China’s phosphorus industry;

Forecast the technology development trend in China’s phosphorus industry;

Forecast on development trends of phosphorus downstream markets in China

Applicable user:

Miners and producers of phosphate rock

Downstream players of phosphate rock, including: yellow phosphorus producers, glyphosate producers, phosphate producers, fertilizer producers,

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phosphide producers, etc.

Academic institutes and association related to phosphorus industry

Traders of phosphate fertilizers

What to report:

Phosphate rock supply in China, including deposit, distribution, reserves, output, quality, etc.

Exploitation condition and cost of phosphate rock in China

Application of phosphate rock in China, such as different kinds of phosphate fertilizer (MAP, DAP, etc.), yellow phosphorus, phosphoric acids, phosphate and phosphides

Consumption volume and consumption pattern of phosphate rock in China

Forecast on consumption of phosphate rock in China

Technology trend of China’s phosphorus industry

Phosphorus recovery at home and abroad

Policies related to China’s phosphorus industry

Available time of phosphate rock in China (based on economic reserves, basic reserves and current proved reserves)

Prospect of China’s future phosphorus industry

Forecast on industry:

China will mainly focus on wet-process phosphoric acid technology, phosphorus recovery technology, exploitation and purification of middle-low grade phosphate rock.

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Among competitors in phosphorus industry, many enterprises will expand their industrial chain to upstream so as to obtain ample resources and energy to save cost, and to downstream by developing more kinds of high value-added phosphorus products.

Regarding the development of phosphorus downstream markets, thanks to the further industrial structure adjustments, it is estimated the growth rate of primary phosphorus chemical products will fall behind that of the fine phosphorus chemical products.

Value to client:

Know the available time of phosphate rock in China;

Find out which province/region has abundant and good quality phosphorus resources;

Obtain the exploitation cost information of phosphate rock in China;

Check how China’s enterprises are preparing for the phosphorus peak;

Obtain an overview of phosphorus downstream markets, such as fertilizer, yellow phosphorus and major phosphorus fine chemical products;

Foresee the cost of China’s phosphate rock in the future;

Know more about the Chinese government and local enterprises’ actions towards the increasing phosphate rock cost and declining quality;

Realize the investment opportunities in China’s phosphorus industry

Methodology:

Desk research

Site visit

Tel investigation

In-depth interview

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PEST analysis

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COMPANIES MENTIONED

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