

Market Research on China Phosphorus Industry

<https://marketpublishers.com/r/M2144C93228EN.html>

Date: January 2018

Pages: 28

Price: US\$ 3,024.00 (Single User License)

ID: M2144C93228EN

Abstracts

China has become one of the biggest phosphorus producers and exporters in the world after 20 years of fast expansion. A relatively complete industrial system for phosphorus industry has been established in China, flowing from mining of phosphate rock, to production of basic and fine phosphorus chemicals.

Phosphate rock is the major raw material in phosphorus industry. About 71% of the phosphate rock is used to produce phosphate fertilizers and the rest is used to produce yellow phosphorus or other chemicals.

Most of the China's phosphorus industry producers are located in Yunnan, Guizhou, Sichuan, Hubei, Jiangsu provinces.

The output of phosphate rock in China was increasing during 2011 to 2016 with average annual growth rate of 13.52%. However, most of China's phosphate rock output and reserves are Grade III phosphate rock. In 2016, the Grade I phosphate rock reserves in China accounted for less than 12% of the national total. The Chinese government was adjusting policies on phosphate rock mining in recent years, gradually closing the small and inefficient phosphate rock mines. The price of phosphate rock was on a downward trend since 2013.

The output of phosphate fertilizers in China was on an upward trend with fluctuations during 2011 to 2015, and reached the periodic peak of the last six years in 2015. However, the growth of phosphate fertilizer capacity and output has exceeded the growth of demand for phosphate fertilizers, which led to overcapacity and oversupply of phosphate fertilizers. The Chinese government encouraged phosphate fertilizer producers to reduce capacity in the recent two years, thus both the capacity and output of phosphate fertilizers had decreased in 2016 and would continue to decrease in the coming years.

The capacity of yellow phosphorus was on a downward trend from 2012 to 2016, in result of reducing the overcapacity of yellow phosphorus. Affecting by raw material prices and production restriction for environmental protection, yellow phosphorus price increased during Q4 2016 to Q4 2017.

This research aims to study China's phosphorus industry by product categories, which includes phosphate rock, phosphate fertilizers (primarily monoammonium phosphate (MAP) and diammonium phosphate (DAP)), and yellow phosphorus.

This report is based on data collected via diverse sources included access to published magazines, journals, government 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 obtained from various sources have been combined and cross-checked to ensure that this report is as accurate and methodologically sound as possible.

SCOPE OF THE REPORT

Region scope: China.

Time scope: 2011 to 2017, primarily 2016 to 2017.

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COMPANIES MENTIONED

Yuntianhua Group Co., Ltd.

Guizhou Kailin (Group) Co., Ltd.

Guizhou Wengfu Group Co., Ltd.

Hubei Yihua Group Co., Ltd.
Hubei Xingfa Chemicals Group Co., Ltd.

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