

Multinational Corporations in Phosphorus Chemical Industry

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Abstracts

In Europe and North America, some phosphorus chemical facilities with high production cost had been shut down. The major phosphorus chemical industry will concentrate in the US, China and Morocco. It's most likely that China may be the center of global phosphorus chemical industry, and the global phosphorus industry will be transferred to China. At the same time, foreign enterprises will gradually change their export model, and cooperate with their domestic phosphorus chemical enterprises. So competition of global phosphorus chemicals will mainly be among their domestic enterprises.

China plays an important role in the international phosphorus chemical industry. It ranks the second by phosphorus ore reserves, and produces about 80% of yellow phosphorus of the world total, and it is also an important phosphorus chemical market for the multinational corporations in phosphorus chemical industry. As the phosphorus resources in the world are limited, holding phosphorus resources has been a strategy for many large international companies. Many of them have come to China to cooperate with Chinese companies, or to found branch office for Chinese market or resources.

China has been the largest phosphate fertilizer producer and consumer. After years of developing and expanding, China has realized self-sufficiency in phosphorus fertilizer. The industrial concentration has increased much in recent years. There were about 1,000 kinds of phosphorus fertilizers in China in 2010. The output of top 5 accounts for 52% of the country's total. In addition, there has been more than 500 phosphorus chemical enterprises (excluding fertilizer ones) in China since 2010. However, most of them are of small business scale and of low value-added, thus leading to the waste of phosphorus resources. Though Chinese enterprises have resource advantages, technology is still the shortcoming for them on the whole.

For fine phosphorus chemicals, there is nearly no leading Chinese enterprises in international market. Many high-end fine phosphorus chemical products rely on import. And the leading enterprises mainly distributed in the US, the EU and Japan. Food grade, pharmaceutical grade and electronic grade phosphorus chemical products will still be the key projects for Chinese enterprises.

In this report, some giant international phosphorus chemical enterprises had been listed and introduced, thus gave a clear distribution of various phosphorus chemical enterprises.

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COMPANIES MENTIONED

Monsanto Company

OCP Group

Lanxess Energizing Chemistry

The Mosaic Company

Jiangsu Chengxing Phosph-Chemicals Co., Ltd.

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