

Global and China Potassium Reserves and Potash Fertilizer Industry Report, 2010 -2011

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Abstracts

Presently, the proved reserves of potassium in the world hit about 10 billion tons, but the distribution shows serious imbalance. Canada, Russia, Belarus and Brazil occupy more than 90% of the global potassium reserves, while China has only 2.2%.

Restricted by potassium resources, the global potash fertilizer market is also dominated by Potash Corp, Mosaic, Uralkali and Silvinit (the latter two were merged at the end of 2010). In 2010, the four manufacturers' output reached 23.876 million tons, accounting for 47.6% of the global total.

Potash Corp is the potash company boasting the largest capacity in the world and owns the mining right of 6 potassium deposits (5 in Saskatchewan and 1 in New Brunswick). In 2010, its potash fertilizer output achieved 8.078 million tons, representing 16.1% of the global total. Meanwhile, Potash Corp also actively made strategic investments in many countries, and now holds 32%, 28%, 14% and 22% shares respectively in SQM, APC, ICL and SINOVERT.

Known as the second biggest fertilizer maker in North America, Mosaic takes possession of the mining right of 3 potassium deposits in Canada and 2 potassium deposits in America. Its potash fertilizer capacity stands above 10 million tons, and its potash fertilizer output was 5.537 million tons in 2010.

Uralkali and Silvinit, two major potash fertilizer makers in Russia, respectively witnessed 5.061 million tons and 5.200 million tons of potash output in 2010, and were merged together at the end of 2010. Both of them have rich mineral resources, of which, Uralkali owns 3.44 billion tons, while Silvinit possesses 5.30 billion tons. In addition, ICL, APC and K+S are all the major potash giants of the world.

In recent years, the potash fertilizer output in China also experienced rapid growth, reaching 3.968 million tons in 2010, up 9.4% year-on-year, but the potash fertilizer consumption there has come to 9.151 million tons, with import dependence up to 56.6%.

The potash fertilizer industry in China aims at achieving “1:1:1 among Self-production, Import and Overseas”, and the national policy also encourages overseas potash resource development. However, amid the limited potash resource at home, unsatisfactory results of overseas resource development and constantly increasing downstream demand, China will still highly depend on import of potash fertilizer in the next few years.

Contents

1. OVERVIEW OF POTASH FERTILIZER INDUSTRY

- 1.1 Definition
- 1.2 Classification
- 1.3 Industry Chain

2. GLOBAL POTASSIUM RESERVES AND POTASH FERTILIZER

- 2.1 Potassium Reserves and Distribution
- 2.2 Supply & Demand
- 2.3 Price
- 2.4 Competitive Pattern
- 2.5 Market Dynamics

3. POTASSIUM RESERVES AND POTASH FERTILIZER IN CHINA

- 3.1 Distribution of Potassium Mineral Resources
- 3.2 Supply & Demand
 - 3.2.1 Output
 - 3.2.2 Consumption
- 3.3 Import & Export
 - 3.3.1 Import
 - 3.3.2 Export
- 3.4 Competitive Pattern
- 3.5 Development Prospect and Dynamics

4. GLOBAL POTASH FERTILIZER ENTERPRISES

- 4.1 Canada Potash Corp
 - 4.1.1 Profile
 - 4.1.2 Operation
 - 4.1.3 Strategy
- 4.2 Agrium
 - 4.2.1 Profile
 - 4.2.2 Operation
- 4.3 Mosaic
 - 4.3.1 Profile

- 4.3.2 Operation
- 4.3.3 Potash Fertilizer Business
- 4.4 Uralkali
 - 4.4.1 Profile
 - 4.4.2 Operation
 - 4.4.3 Comparison Between Uralkali and Silvinit
 - 4.4.4 Capacity Expansion Plan
- 4.5 Silvinit
 - 4.5.1 Profile
 - 4.5.2 Operation
 - 4.5.3 Ore Reserves
- 4.6 ICL
 - 4.6.1 Profile
 - 4.6.2 Operation
 - 4.6.3 Potash Fertilizer Business
 - 4.6.4 Strategy and Goals
- 4.7 K+S
 - 4.7.1 Profile
 - 4.7.2 Operation
 - 4.7.3 Potash Fertilizer Business
- 4.8 Arab Potash Company
 - 4.8.1 Profile
 - 4.8.2 Operation
 - 4.8.3 Projects

5. CHINESE POTASH FERTILIZER ENTERPRISES

- 5.1 Qinghai Salt Lake Industry Co., Ltd
 - 5.1.1 Profile
 - 5.1.2 Operation
 - 5.1.3 Dynamics
- 5.2 SDIC Xinjiang Luobupo Potash Co., Ltd
 - 5.2.1 Profile
 - 5.2.2 Operation
- 5.3 BinDi Salt

Selected Charts

SELECTED CHARTS

Potash Fertilizer Industry Chain

Distribution of Global Potassium Reserves by Country

Global distribution and reserves of potassium ores

Global Output of Potash Fertilizer (by KCL), 2002-2010

Distribution of Global Potash Fertilizer Output (by KCL), 2009

Forecast of Global Population and Arable Land Per Capita

Growth Rate of N, P, K Fertilizer Consumption Worldwide, 2011F

Monthly Average Price of Potash Fertilizer in Saskatchewan, May 2007-May 2011

Key Potash Fertilizer Producers Worldwide and Their Output (by KCL), 2010

Distribution of Potassium Resources in China

Output and YoY Growth of Potash Fertilizer in China (by KCL), 2003-2010

Distribution of Potash Fertilizer Output in China, 2010

Apparent Consumption of Potash Fertilizer in China, 2008-2010

Grain Output, Sown Acreage and YoY Growth in China, 2002-2009

Import Volume of Potassium Chloride in China, 2007-2010

Import Origins of Potassium Chloride in China (by Volume), 2010

Import Value and Unit Price of Potassium Chloride in China, 2007-2010

Export Volume, Value and Average Unit Price of Potash Fertilizer in China, 2008-2010

Export Destinations of Potassium Chloride of China (by Volume), 2010

Key Potash Fertilizer Producers in China and Their Output, 2010

Sales and Gross Profit of PCS's Potash, 2007-2010

Potash Output of PCS, 2004-2010

Potash Sales Volume of PCS, 2004-2010

Potash Sales Breakdown of PCS by Region, 2010

PCS's estimated recoverable ore (reserve tonnage) for each of potash mines

Projects Completed and in Progress of PCS

Potash Net Sales and Gross Profit of Agrium, 2008-2010

Potash Sales Volume and Selling Price of Agrium, 2010

Potash Net Sales Breakdown of Agrium by Region, 2010

Net Sales and Gross Profit of Mosaic, FY2008-FY2010

Net Sales Breakdown of Mosaic by Region, FY2010

Net Sales Breakdown of Mosaic by Product, FY2010

Potash Net Sales and Gross Profit of Mosaic, FY2008-FY2010

Potash Sales volume of Mosaic, FY2008-FY2010

Average selling price of MOP (FOB plant) of Mosaic, FY2008-FY2010

Mineral Reserves and Potash Products Output of Mosaic, FY2008-FY2010
Recoverable Potash Reserves and Potash Mineralization of Mosaic as of May 31, 2010
for each mines
Annualized Proven Peaking and Operational Capacity of Mosaic as of May 31, 2010 for
each mines
Revenues and Net Income of Uralkali, 2006-2010
Output and Sales Volume of Potassium Chloride of Uralkali, 2006-2010
Sales Volume of Potassium Chloride of Uralkali By Region, 2006-2010
Sales volume Breakdown of Uralkali by Region, 2010
Average Export and Domestic Potash Prices of Uralkali, 2006-2010
Comparison Between Uralkali and Silvinit
Revenue and Gross Profit of Silvinit, 2007-2010
Revenue Breakdown of Silvinit by Product , 2010
Potash Fertilizer Output of Silvinit, 2000-2010
Potassium Reserves of Silvinit as of Jan 2011
Revenue and Gross Profit of ICL, 2008-2010
Revenue Breakdown of ICL by business, 2010
Potash Fertilizer Revenue of ICL, 2008-2010
Gross Margin of Potash Fertilizer of ICL, 2008-2010
Potash Fertilizer Output, Sales Volume and Closing Stock of ICL, 2009-2010
Fertilizers Revenue Breakdown of ICL by Region, 2010
Revenue of K+S, 2006-2010
Revenue of K+S by Product, 2006-2010
Sales Volume Breakdown of Potassium and Magnesium Products of ICL by Region,
2010
Reserves and Potash Resources of K+S
Revenue and Gross Profit of APC, 2006-2010
Output and Sales Volume of Potash Fertilizer of APC, 2006-2010
APC Sales Volume by Region, 2006-2010
Sales Volume Breakdown of APC by Region, 2010
Operating Revenue and Net Income of Qinghai Salt Lake, 2007-2010
Potassium Chloride Output and Sales Volume of Qinghai Salt Lake, 2007-2010
Potassium Chloride Sales Revenue and Gross Margin of Qinghai Salt Lake, 2007-2010
Average Price of Potassium Chloride of Qinghai Salt Lake, 2007-2010
Operating Revenue and Net Income of SDIC Xinjiang Luobupo Potash, 2008-2010

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