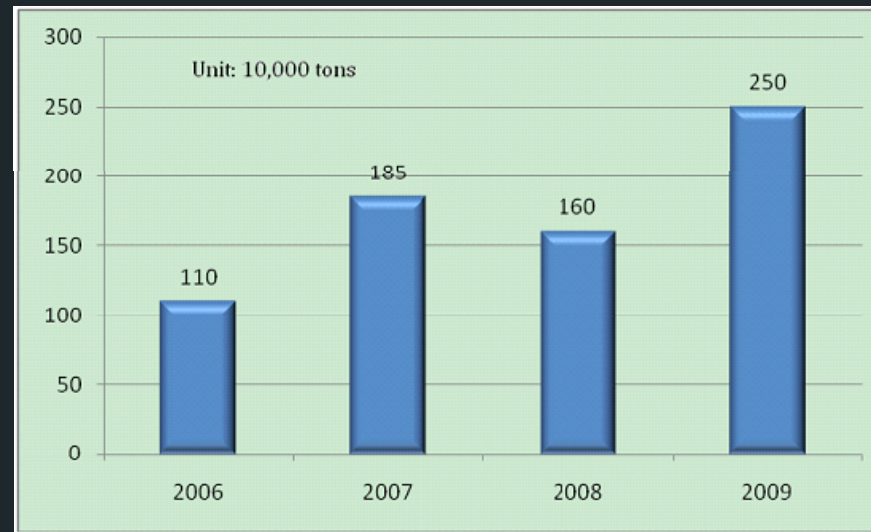


## China Sulfur Industry Report, 2009



Along with the development of energy industry, the global by-product sulfur output will continue to increase, and not be limited by market demand. At present, China sulfur is mainly produced from petroleum refining, natural gas processing and coal chemical processing, of which petrochemical industry generates the most by recycling, and enjoys strong growth.

### China Sulfur Output, 2006-2009

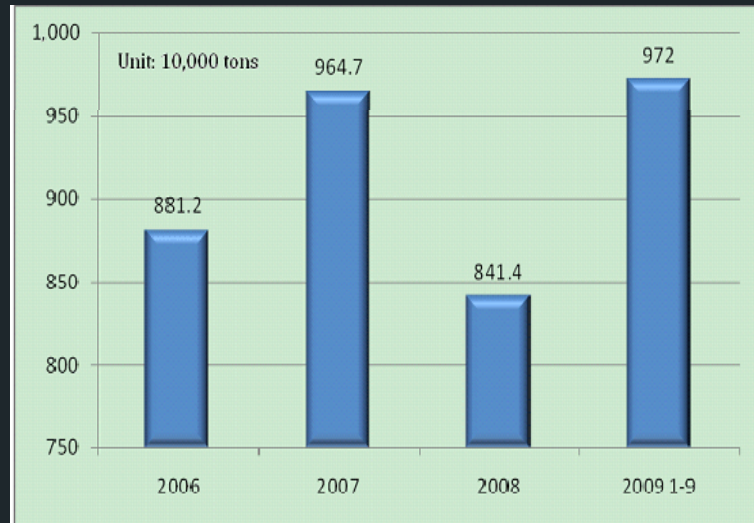


Source: China Petroleum & Petrochemical Equipment Industry Association, ResearchInChina

According to the statistics, China consumed about 10 million tons of sulfur in 2006, while its output was only 1-2 million tons; the consumption in 2007 was 10.85 million tons. Affected by the financial crisis in 2008, the consumption decreased sharply to 8.75 million tons. In 2009, its consumption restored, and reached 9 million tons in Jan.-Sep., more than that of full year of 2008. It is forecasted that the total consumption in 2010 will be about 13 million tons.

China's sulfur demand is mainly satisfied by import. In 2007, it imported sulfur of 9.647 million tons, up 9.6% yr-on-yr, and accounted for 90% of total consumption. In 2008, it imported 8.414 million tons, down 12.9% yr-on-yr affected by the financial crisis. With the economic recovery in 2009, the import increased greatly, and it imported 9.72 million tons in the first nine months alone, up 46.8% than the same period of 2008.

### China Sulfur Import, 2006-Jan.-Sep.2009



Source: China Customs, ResearchInChina

Viewed from the current sulfur and sulfuric acid supply situation in China, it still needs to rely on import. However, with the release of sulfur capacity in China since 2009, the import reliance will be changed after 2010.

Domestic-made sulfur is mainly sourced from subsidiaries of China Petroleum & Chemical Corporation and PetroChina Company Limited.

According to statistics, there were more than 40 sulfur producers in China petrochemical industry in 2006, and among which 8 had annual output of above 50,000 tons, the largest one—Maoming PetroChemical's output reached 150,000 tons.

In Oct. 2009, the new sulfur recycling facility of 100,000 tons/year, solvent regeneration facility of 500 tons/hour and sulfur packaging facility of Maoming Petrochemical were put into operation successfully. In the same month, its sulfur products passed national certification, which made Maoming Petrochemical the first enterprise that had food-grade sulfur production ability and qualification.

In 2010, with the construction and exploitation of the largest sulfur production base in China—Sichuan Dazhou Natural Gas Field, the sulfur output of China will get to 4.5 million tons. Also with the operation of gas fields in Northeast of Sichuan Province of CNPC and CPCC, the tense supply situation of sulfur will be relieved.

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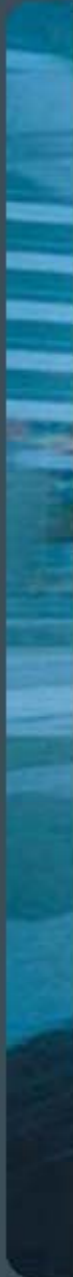
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|---|-------|------|---|
|   | USD   | File | By email:<br>report@researchinchina.com |
| Single user   | 1,500 | PDF  | By fax:<br>86-10-82600829               |
| Enterprisewide  | 2,200 | PDF  | By online:<br>www.researchinchina.com   |
| Publication date: Dec. 2009   |       |      |   |
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