



China Phosphorite and Phosphorous Chemical Industry Report, 2010-2011

May 2011

This report

- ◆ **Analyzes the overview of global phosphorite industry.**
- ◆ **Focuses on the supply & demand, import & export, price trend, etc. of phosphorite and phosphorous chemical market segments.**
- ◆ **Highlights the operation, competitive edge and development outlook of 9 major phosphorous chemical enterprises in China.**

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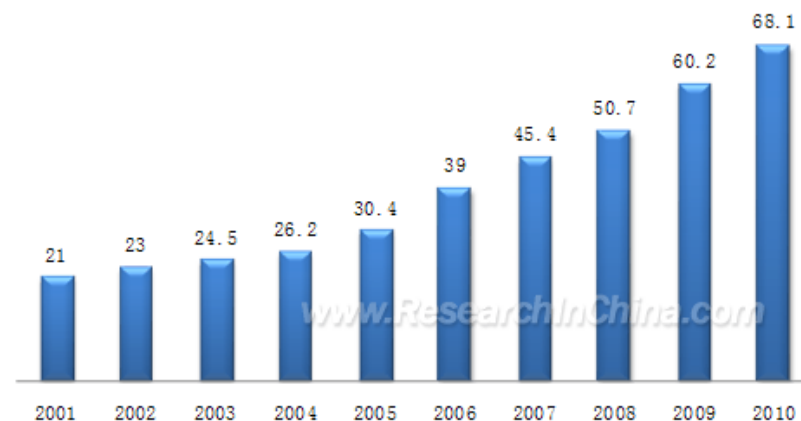
China Ethylene Oxide (EO) Industry Chain Report, 2010-2011

Abstract

China abounds in phosphorite and its output ranked the world's first by 36.9% share of the global total in 2010. The vigorous downstream demand has fueled the rapid progress of Chinese phosphorous chemical industry in recent years, and the respective output of such traditional phosphorous chemical products as phosphate fertilizer, yellow phosphorus, and STPP has leaped to the first place in the world.

In respect of total output, China has blossomed into the big power of phosphorous chemical industry, yet certain phosphorous chemicals have been evidenced by overcapacity. Take yellow phosphorus as an example. Its capacity approximated 2 million tons in 2010, while the output was merely 899 kilotons, and the operating rate was shy of 50%.

Phosphorite Output in China, 2001-2010 (Unit: mln tons)



Source: National Bureau of Statistics of China;
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Nevertheless, some promising fine phosphorous chemical products like electronic grade phosphoric acid, lithium hexafluorophosphate, lithium iron phosphate, and organophosphorus flame retardants highly rely on import due to the complicated production technology and limited domestic supply. For instance, Tianjin Jinniu Power Sources Material Co., Ltd. was the sole manufacturer of lithium hexafluorophosphate in 2010 with the annual capacity of 250 tons. However, the company did not sell lithium hexafluorophosphate, so the domestically needed lithium hexafluorophosphate was still mainly provided by overseas enterprises.

The report underlines not only the supply & demand, import & export, price trend, etc. of phosphorite and phosphorous chemical market segments, but also the operation, competitive edge and development outlook of 9 major phosphorous chemical enterprises in China.

Benefiting from the resource superiorities including phosphorite and electrical energy, as well as the relatively perfect phosphorous chemical industry chain, Hubei Xingfa Chemicals Group Co., Ltd. (Hubei Xingfa) and Jiangsu Chengxing Phosph Chemicals Co., Ltd. are the deserved leading companies in Chinese phosphorous chemical industry. Up to the end of 2010, their reserves of phosphorite hit 150 million tons and 120 million tons, respectively, with the self sufficiency rate of over 50% each.

Hubei Yihua Chemical Industry Co., Ltd., Anhui Liuguo Chemical Co., Ltd., and Anhui Sierte Fertilizer Industry Co., Ltd. are the important suppliers in China's phosphate fertilizer market segments. Among them, the former two boast their superiority in phosphorite resource, and Sierte enjoys the cost advantage brought by the integrated industry chain from pyrite based acid preparation to phosphate compound fertilizer.

Guizhou Kailin Group Co., Ltd. (Kailin Group) has enhanced the control over phosphorite resources and meanwhile expanded towards the phosphorous chemical products like downstream phosphate fertilizer; it accomplished the 1.20 million tons per annum diammonium phosphate project at the end of 2009.

Yibin Tianyuan Group Co., Ltd. is the key manufacturer of STPP in China. Its STPP revenue totaled RMB2.647 million in 2010, sharing merely 5.4% or so of the operating income, but the profit from phosphorous chemical business is anticipated to advance further in the future along with the purchasing of phosphorite resources.

Yunnan Malong Industry Group Co., Ltd. and Jiangsu Yoke Technology Co., Ltd. are the giants respectively in the market segments of yellow phosphorus and organophosphorus flame retardants, with the output proportion of 11% and over 30% separately of the national total in 2010.

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