



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

Jun 2011

This report

- ◆ **Analyzes global potash fertilizer supply & demand and competitive pattern.**
- ◆ **Focuses on potassium reserves supply & demand, import and export, and competitive pattern in China.**
- ◆ **Highlights the operation of global and Chinese leading enterprises.**

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Abstract

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.

Major Potash Fertilizer Producers and Their Output, 2010

(by KCL, Kt)

Company	Country	Output	Share in Global Output
Potash Corp	Canada	8078	16.1%
Mosaic	America	5537	11.0%
Silvinit	Russia	5200	10.4%
Uralkali	Russia	5061	10.1%
ICL	Israel	4251	8.5%
APC	Jordan	1943	3.9%
Agrium	Canada	1784	3.6%
QingHai Salt Lake Industry Group Co., Ltd	China	2316	4.6%

Source: ResearchInChina

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 SINO FERT.

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.

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