



China Phosphorus and Phosphorus Chemical Industry Report, 2012-2014

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STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

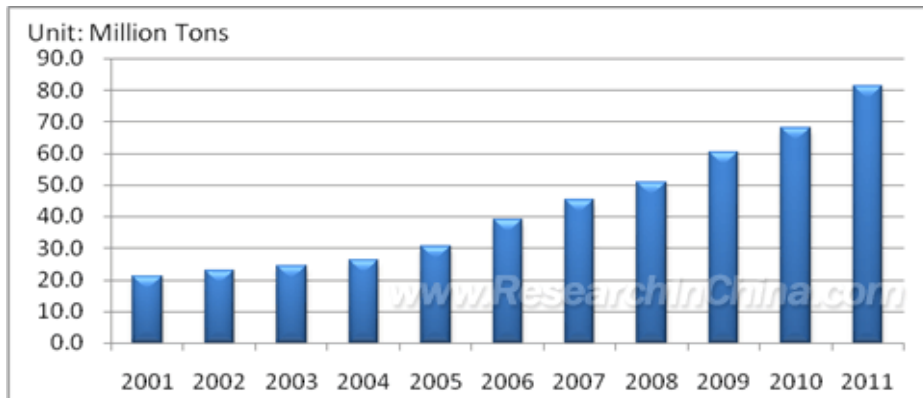
The primary information sources include USGS, China Customs, Wind Information and National Bureau of Statistics of China etc.

Abstract

In recent years, China's output of phosphorite has presented rapid growth. In 2011, China's phosphorite output hit 81.224 million tons, ranking No. 1 in the world. But the phosphorite features low grade, and the high-grade ores (>30%) only accounts for 9% of the total. In the context of declining ore grade, the production costs of Chinese phosphorite mining enterprises will show a rising trend. But the price of China's phosphorite has been lower than the international level, because the major producing areas restrict the resource outflow and 35% export tariff is levied.

The demand for phosphorite is mainly from phosphate fertilizer and primary phosphate products which characterize low added value. In 2011, 71.0% of China's total output of phosphorite was used for the production of phosphate fertilizer, and 13.0% and 6.0% were applied in manufacturing yellow phosphorus and feed respectively. Now the total capacity of phosphate fertilizer surpasses 21 million tons (P205), while the domestic demand only reaches around 12 million tons. Moreover, a large number of phosphate fertilizer plants still wait to be put into operation, when a serious oversupply will emerge.

Phosphorite Output in China, 2001-2011



Source: National Bureau of Statistics of China; ResearchInChina

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China's phosphorus chemical industry keeps being transferred to upstream and high value-added downstream sectors (mainly high-end phosphide and phosphate). As China adopts thermal phosphoric acid process to produce high-end phosphide and phosphate and the policies concerning phosphorus chemical industry support the integrated superior companies, electricity, self-sufficiency of phosphorite and so forth will determine the production costs and competitive edges of a company. Hubei Xingfa Chemicals Group Co., Ltd. is one of the leaders in the integrated development of phosphorus chemical.

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Now Hubei Xingfa Chemicals Group boasts phosphorite reserve of 220 million tons and annual capacity of 5 million tons. In 2011, the gross margin of the company's phosphorite registered 80.9%, much higher than its consolidated gross margin of 13.8%. Moreover, the company also owns phosphorite which is still in exploration phase (estimated reserves of 150 million tons). With respect to the phosphorus chemical, the company possesses a wide range of fine phosphorus chemical products, with annual capacity exceeding 1 million tons. Additionally, the company will continue to promote the industrial grade phosphorus chemical products to transform to food and electronic grade ones, and inorganic phosphorus chemical to organophosphorus chemical, and focus on the development of compound phosphate, organophosphorus flame retardant, water treatment agent and organophosphorus extracting agent.

- Policy environment and industrial chain characteristics of China's phosphorus chemical industry, and the influence exerted by its upstream and downstream sectors;
- Status quo, market supply and demand, price trend and competitive landscape of China's traditional phosphorus chemicals such as yellow phosphorus, phosphoric acid and phosphate, etc.
- Current situation, market supply and demand, and competition pattern of China's fine phosphorus chemicals like organophosphorus flame retardants, electronic grade phosphorus chemicals, phosphorus-containing chemicals of new energy battery, organophosphorus pesticides, phosphorus-based water treatment agent;
- Production, operation, investment & merger, phosphorus and phosphorus chemical business and development prospects of 10 phosphorus and phosphorus chemical enterprises in China.

The report mainly highlights the followings:

- Reserves, market supply and price trend of phosphorite in China and the World;

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