

# Survey of Phosphorus Industry in China 2023

The Eighth Edition

December 2023

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**Kcomber Inc.**

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## 1. Introduction

China has become one of the biggest phosphorus producers and exporters in the world after 20 years of fast expansion. A relatively complete industrial system for phosphorus industry has been established in China, covering from mining of phosphate rock, to production of basic and fine phosphorus chemicals.

What had happened to the industries during 2018–2022? How about the performance of the producers?

Answers to these questions can be found in this intelligence report.

The key points of this report are listed as below:

- Output and price of phosphate rock in China, 2018–2022;
- Price and export analysis of two major types of phosphate fertilizers in China, 2018–2022;
- Capacity and output of yellow phosphorus in China, 2018–2022;
- Export analysis of yellow phosphorus in China;
- Key phosphorus producers information in China.

Scope of the report:

Region scope: China

Time scope: 2018 to 2022

## 2. Approach for this report

This report is based on data collected with diverse methods, which are listed as follows:

### **Desk research**

This includes access to published magazines, journals, government, industry and customs statistics, association seminars as well as information from the Internet. A lot of work has gone into the compilation and analysis of the obtained information. Data collected and compiled are variously sourced from:

- CCM's database
- Published articles from periodicals, magazines, journals, and third-party database.
- Statistics from governments and international institutes
- Customs statistics
- Comments from industrial experts on various platforms
- Information from the Internet

### **Telephone interview targets**

- Key producers
- Key traders
- Industrial associations
- Industrial experts

### **Data compilation and crosscheck**

Data obtained from various sources have been combined and cross-checked to ensure that this report is as accurate and methodologically sound as possible.

### 3. Executive summary

Phosphate rock is an upstream source of phosphorus element. The distribution of world phosphate rock reserves is uneven, mainly in Morocco and Western Sahara. China's phosphate rock reserves rank second in the world. According to data from the National Bureau of Statistics of China, the reserves of phosphate rock in China are XXX tonnes. Most phosphate mines are distributed in provinces such as Hubei, Yunnan, Guizhou, and Sichuan. Affected by environmental policies, China's annual production output of phosphate rock showed a downward trend from 2018 to 2020. However, in 2021 and 2022, driven by strong market demand, the production output of phosphate rock increased for two consecutive years.

In terms of its application, phosphate rock is mainly used for the production of phosphate fertilizers. However, in recent years, due to increasingly strict environmental regulations and fluctuations in downstream demand in China, the production output of phosphorus fertilizers has been declining. Since 2018, the production outputs of DAP and MAP have generally shown a downward trend. In 2022, China produced XXX tonnes of MAP and XXX tonnes of DAP, which sank by XXX YoY and XXX YoY respectively.

China's yellow phosphorus production accounts for a large proportion in the world. From 2019 to 2021, China's yellow phosphorus capacity remained relatively stable. In 2022, due to the increase in downstream demand and the rise in yellow phosphorus prices, the production enthusiasm of producers increased, which resulted in a significant increase in capacity and output. In 2022, China's yellow phosphorus output reached XXX tonnes, an increase of XXX YoY. In 2022, the yellow phosphorus capacity was XXX t/a, an increase of XXX YoY.

#### 4. What is in the report?

**Note: Key data/information in this sample page is hidden, while in the report it is not.**

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##### 1.1 Overview of global phosphate rock

The estimated global output of phosphate rock in 2022 climbed up by XXX compared to the output in 2021, and went up by XXX compared to the output in 2018.

From 2018 to 2020, the global output of phosphate rock declined year by year, mainly because some countries, out of concerns for environmental protection and conservation of non-renewable phosphate rock resources, scaled down the size of their phosphate rock mining.

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Figure 1.1-1 Global phosphate rock output, 2018–2022E



Source: United States Geological Survey (USGS), National Bureau of Statistics (NBS)

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##### 1.2.1 Distribution of phosphate rock reserves, 2022

In 2022, the proven phosphate rock reserves in China were about XXX tonnes, which increased by XXX compared to that in 2021. Most of the phosphate rock reserves in China are distributed in provinces including Yunnan, Hubei, Sichuan, and Guizhou.

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Figure 1.2.1-1 Distribution of phosphate rock reserves in China by region, 2022



Source: CCM

### 1.2.2 Output of phosphate rock, 2018–2022

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Figure 1.2.2-1 Output of phosphate rock in China, 2018–2022



Source: NBS

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### 1.2.3 Price of phosphate rock, 2018–2022

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Figure 1.2.3-1 Monthly ex-works price of 29% phosphate rock in China, 2021–2022



Source: CCM

## 2.2 MAP in China, 2018–2022

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### 2.2.3 Import and export

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Figure 2.2-3 Monthly exports of MAP from China, Jan. 2018–Dec. 2022



Source: China Customs

## 2.3 DAP in China, 2018–2022

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### 2.3.3 Import and export

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Figure 2.3-3 Monthly exports of DAP in China, Jan. 2018–Dec. 2022



Source: China Customs

...

## 3 Yellow phosphorus in China

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### 3.2 Price of yellow phosphorus, 2018–2022

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Figure 3.2-3 Monthly ex-works price of yellow phosphorus in China by region, Jan. 2018–Dec. 2022



Source: CCM

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