CCM Data & Business Intelligence

Phosphate fertilizers in China

The First Edition

December 2022

Researched & Prepared by:

Kcomber Inc.

Contents

LIST OF TABLES

LIST OF FIGURES

1. Introduction

At present, China has become one of the biggest phosphate fertilizers producers and exporters in the world. What happened to the phosphate fertilizers industry during 2019–2021? How about the performance of the industry?

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

The key points of this report are listed as below:

- ✓ Key findings of phosphate fertilizers in China
- ✓ Production of phosphate fertilizers in China
- ✓ Import and export analysis
- ✓ Consumption of phosphate fertilizers in China
- ✓ Production cost analysis
- ✓ Future forecast

Scope of the report:
Region scope: China
Time scope: 2019 to 2021

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

The data from various sources have been combined and cross-checked to make this report as precise and scientific as possible. Throughout the process, a series of internal discussions were made in order to analyze the data and have conclusions drawn.

3. Executive summary

Faced with increasingly stringent environmental standards, fierce competition and other factors, China's phosphate fertilizer industry structure has been continuously optimized and upgraded. In 2019–2020, the production of China's phosphate fertilizer witnessed a downward trend, the output (converted to 100% P_2O_5) decreased greatly, to XXX tonnes in 2020 from XXX tonnes in 2019.

- Production
As the world's largest producer of phosphate fertilizers, the capacity of MAP and DAP were XXX t/a and XXX t/a respectively as of 2021. In 2021, China's MAP output increased slightly to XXX tonnes, but the output of DAP decreased by XXX% year on year to XXX tonnes. Domestic MAP and DAP production is mainly distributed in Western China with abundant phosphate ore supply, such as Yunnan, Guizhou and Sichuan Provinces.

- Consumption
The China's consumption of MAP saw a downtrend in 2019–2021, and the annual share of MAP consumption in Western China accounted for XXX–XXX of the total in the past three years. It is estimated that the share in Western China will increase to nearly XXX in the future. In 2019–2021, China's DAP consumption fluctuated, and the annual share of DAP consumption in Western China decreased in the past three years, to about XXX of the total in 2021. It is estimated that the share in Western China will continue to decline in the future.

- Import and export
In 2019–2021, China's MAP and DAP import volume was less than export. China's export volume of MAP kept increasing, with 2021 MAP export volume increasing to XXX tonnes, up by XXX year on year. Also, export is an important consumption direction of DAP in China, with an annual export volume about XXX of the total output. In 2021, China's export volume of DAP was XXX tonnes, up by XXX year on year.

4. What is in the report

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

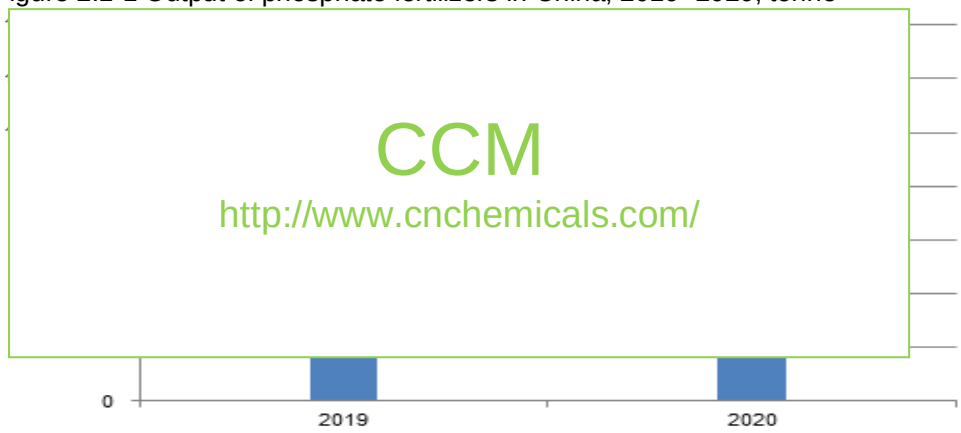
…

2 Supply and Demand

2.1 Brief induction

…

Figure 2.1-1 Output of phosphate fertilizers in China, 2019–2020, tonne



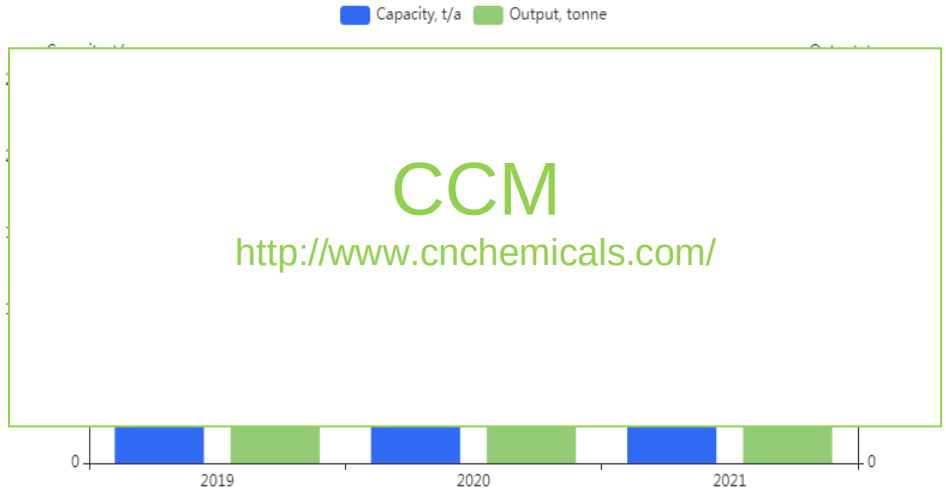
Note:1. Converted to 100% P_2O_5. 2. Data for 2021 is not available.
Source:NBS

2.2 MAP in China

2.2.1 Production, 2019–2021

…

Figure 2.2.1-1 Capacity and output of MAP in China, 2019–2021



Note:The calculation is based on actual volume.
Source:CCM

Table 2.2.1-1 Production situation of MAP producers in China, 2019–2021

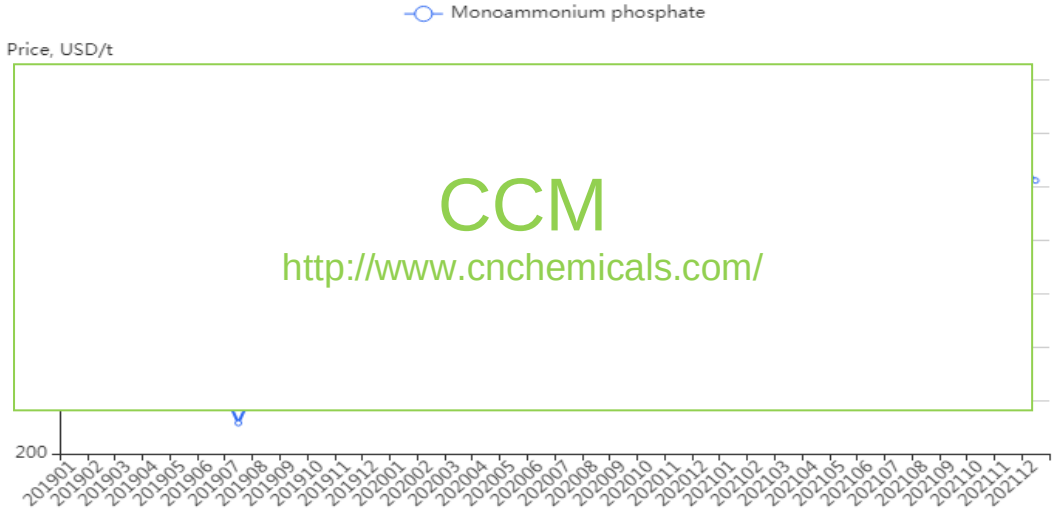
No.	Producer	Location	Capacity, t/a			Output, tonne		
			2019	2020	2021	2019	2020	2021
1	Xinyangfeng Agricultural Technology Co., Ltd.	Hubei Province	XXX	XXX	XXX	XXX	XXX	XXX
2	…	XXX	XXX	XXX	XXX	XXX	XXX	XXX
…	…	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Note:The calculation is based on actual volume.
Source:CCM

2.2.2 Price

…

Figure 2.2.2-1 Ex-works price of 55% powder MAP in China, Jan. 2019–Dec. 2021



Source:CCM

2.2.3 Import and export

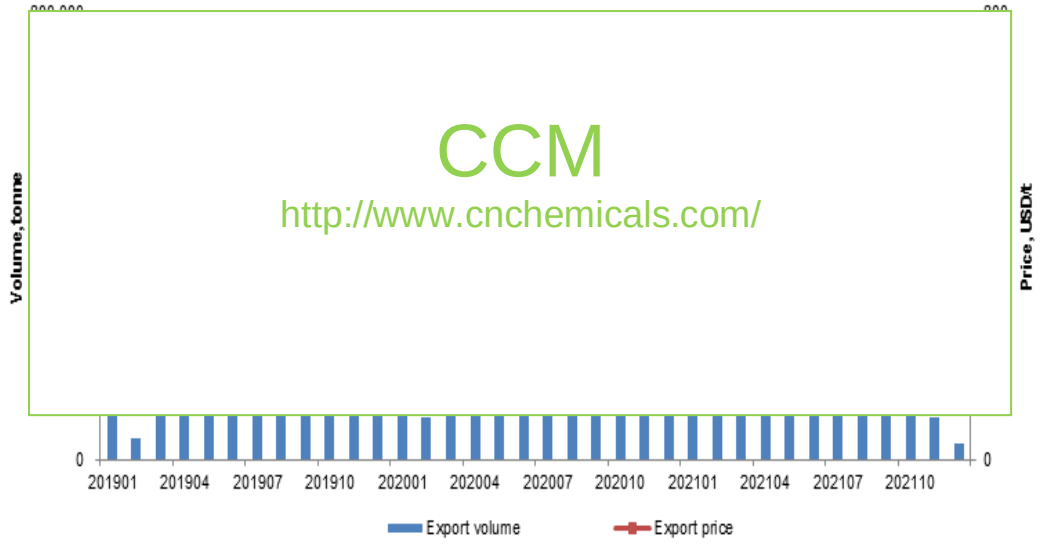
…

Table 2.2.3-1 Imports and exports of MAP in China, 2019–2021

Year	Import			Export		
	volume, tonne	Value， USD	Price， USD/t	volume, tonne	Value， USD	Price， USD/t
2019	XXX	XXX	XXX	XXX	XXX	XXX
2020	XXX	XXX	XXX	XXX	XXX	XXX
2021	XXX	XXX	XXX	XXX	XXX	XXX

Source:China Customs

Figure 2.2.3-1 Monthly exports of MAP from China, Jan. 2019–Dec. 2021



Source:China Customs

Table 2.2.3-2 Top ten export destinations of MAP in China, 2019–2021

No.	2019			2020			2021		
	Destination	Volume, tonne	Price, USD/t	Destination	Volume, tonne	Price, USD/t	Destination	Volume, tonne	Price, USD/t
1	Brazil	XXX	XXX	…	XXX	XXX	…	XXX	XXX
…	…	XXX	XXX	…	XXX	XXX	…	XXX	XXX
Others		XXX	XXX	Others	XXX	XXX	Others	XXX	XXX
Total/Average		**XXX**	**XXX**	**Total/Average**	**XXX**	**XXX**	**Total/Average**	**XXX**	**XXX**

Source:China Customs

Figure 2.2.3-2 Share of top ten export destinations of MAP in China, 2021

Source:CCM & China Customs

Table 2.2.3-3 China's MAP export volume by province, 2019–2021

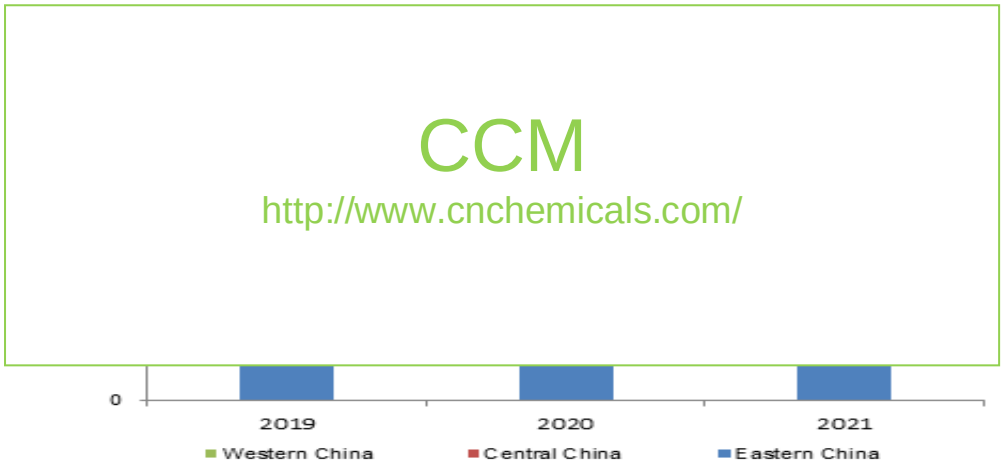
No.	2019			2020			2021		
	Province	Export volume, tonne	Share	Province	Export volume, tonne	Share	Province	Export volume, tonne	Share
1	Yunnan	XXX	XXX	…	XXX	XXX	…	XXX	XXX
…	…	XXX	XXX	…	XXX	XXX	…	XXX	XXX
Others		XXX	XXX	Others	XXX	XXX	Others	XXX	XXX
Total		**XXX**	**XXX**	**Total**	**XXX**	**XXX**	**Total**	**XXX**	**XXX**

Source:China Customs

2.2.4 Consumption

…

Figure 2.2.4-1 Apparent consumption volume of MAP in China by region, 2019–2021, tonne



Note:The calculation is based on actual volume.
Source:CCM

2.2.5 Production cost analysis

Table 2.2.5-4 Production cost of 55% powder MAP in China, 2021

No.	Item	Unit cost, USD/t
1	Manufacturing cost	XXX
2	Management cost	XXX
Total		**XXX**

Source:CCM

…

2.5 Transportation

Table 2.5-1 Rail transport costs for phosphate fertilizer producers to regions and ports in China

Producer	Western Province				Eastern port			
	Xinjiang (Yining City)		Inner Mongolia (Hohhot City)		Zhejiang (Ningbo City)		Guangdong (Guangzhou City)	
	Distance, Km	Cost, USD	Distance, Km	Cost, USD	Distance, Km	Cost, USD	Distance, Km	Cost, USD
Xinyangfeng Agricultural Technology Co., Ltd.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sichuan Development Lomon Co., Ltd.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Guizhou Kailin Group Co., Ltd.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Yunnan Yuntianhua Co., Ltd.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Note:1.The exchange rate in 2021: USD1.00=CNY6.4615 2. Calculated at 50 tonnes/time.
Source:CCM

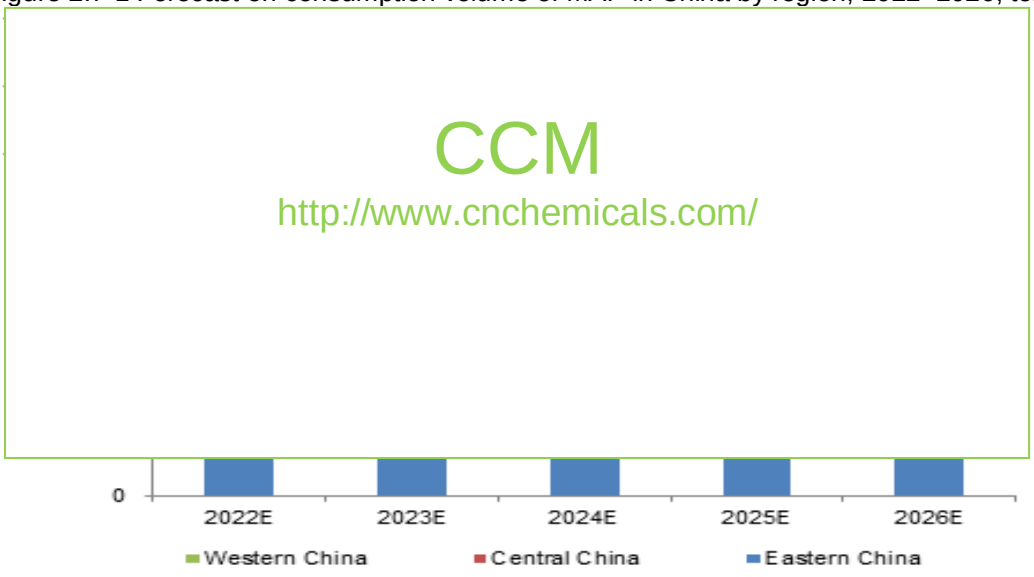
Table 2.5-2 Rail transport costs from Yining City to eastern ports in China

Departure	Destination	Distance, Km	Cost, USD
Xinjiang (Yining City)	Zhejiang (Ningbo City)	XXX	XXX
	Guangdong (Guangzhou City)	XXX	XXX

Note:1. The exchange rate in 2021: USD1.00=CNY6.4615 2. Calculated at 50 tonnes/time.
Source:CCM

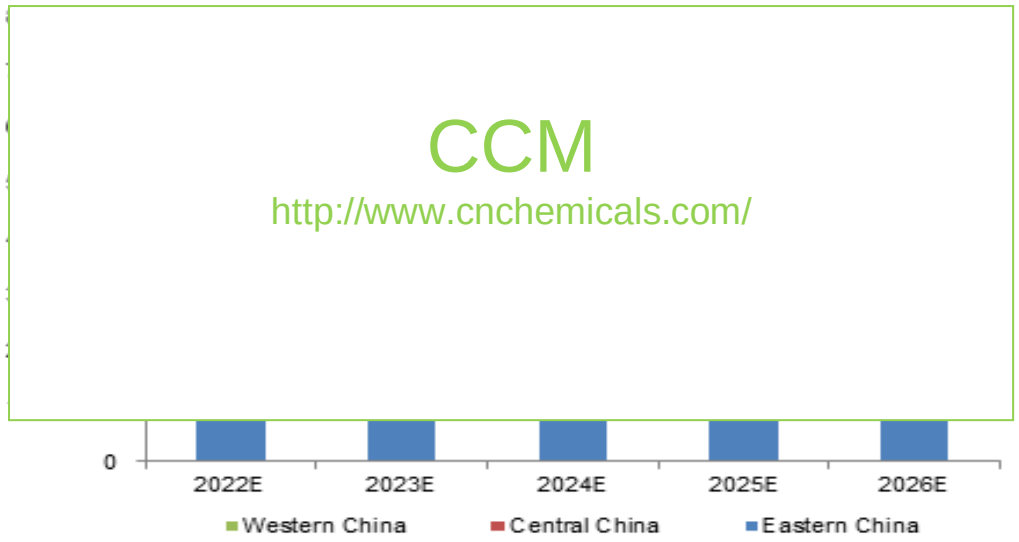
2.7 Consumption forecast, 2022–2026

Figure 2.7-1 Forecast on consumption volume of MAP in China by region, 2022–2026, tonne



Source:CCM

Figure 2.7-2 Forecast on consumption volume of DAP in China by region, 2022–2026, tonne



Source:CCM

…

If you want more information, please feel free to contact us
Tel: +86-20-37616606 Fax: +86-20-37616968
Email: econtact@cnchemicals.com