

China Phosphorus Industry Report

The First Edition

Dec. 2018

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1. Introduction

China phosphorus industry report, finished in Dec. 2018, is CCM's first edition report on yellow phosphorus industry. This intelligent report attaches importance to the following parts:

- Overview of yellow phosphorus in China, 2016–H1 2018
- Production of other yellow phosphorus derivatives in China, 2016–H1 2018
- Environmental protection policies related to phosphorus industry

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

After years of development, China's phosphorus chemical industry has developed from preliminary processing of phosphate rock (mainly yellow phosphorus) into modern phosphorus chemical industry dominated by yellow phosphorus deep processing and phosphoric acid refinement, which produces sodium tripolyphosphate, phosphorus pentoxide, sodium hexametaphosphate and other products with yellow phosphorus and phosphoric acid.

The production pattern of yellow phosphorus industry has changed after undergoing industry rectification and elimination of backward capacity, whose domestic capacity has dropped from XXX t/a in 2016 to XXX t/a in the first half of 2018. In addition, the operating rates of domestic yellow phosphorus producers have been less than XXX% in the past three years, due to stringent environmental protection in China. The operating rates in 2016, 2017 and H1 2018 were XXX %, XXX % and XXX % respectively.

Although domestic phosphorus chemical industry has been developing towards the deep processing of yellow phosphorus, at present, the industry is still dominated by basic products, such as sodium tripolyphosphate and phosphorus pentoxide, while phosphorus fine products only account for a small proportion. Due to fast capacity expansion by domestic producers in the past, part of the yellow phosphorus downstream products are currently faced with severe overcapacity. Meanwhile, with the increase of production costs in recent years, high-cost producers have begun to withdraw from the market. Therefore, it is expected that the industry concentration will be gradually improved in the future.

The capacity of several phosphorus chemical products in China decreased in 2016–H1 2018:

- Phosphorus trichloride from XXX t/a in 2016 to XXX t/a in H1 2018
- Phosphorus pentoxide from XXX t/a in 2016 to XXX t/a in H1 2018
- Sodium hexametaphosphate from XXX t/a in 2016 to XXX t/a in H1 2018

In addition, although the capacity of sodium tripolyphosphate, red phosphorus and sodium hypophosphite remained basically unchanged in the past three years, overcapacity still exists. Therefore the capacity of these products is expected to decline in the next few years.

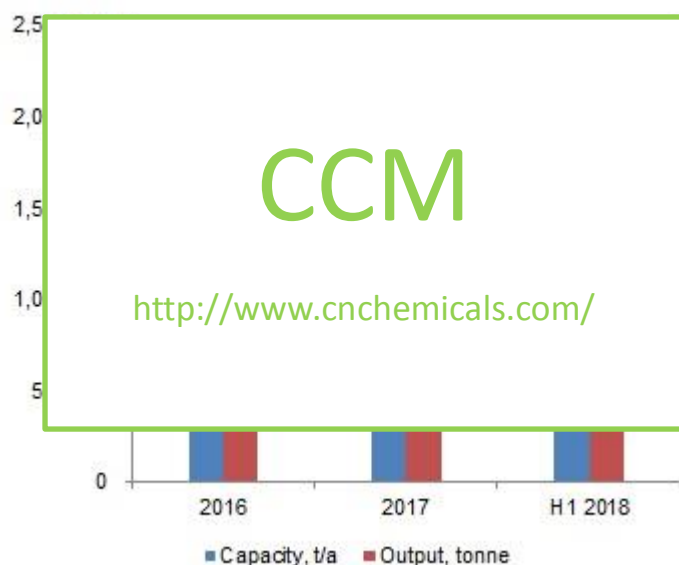
4. What is in the report?

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

1.1 Overall production of yellow phosphorus in China, 2016–H1 2018

China's yellow phosphorus capacity has been on a downward trend in 2016–2017, down by XXX % year on year. And this trend kept to H1 2018, there was XXX t/a less than that in 2017.

Figure 1.1-1 Capacity and output of yellow phosphorus in China, 2016–H1 2018



Source: CCM

1.2 Major active yellow phosphorus producers in China, 2016–H1 2018


Table 1.2-1 Capacity of yellow phosphorus producers in China, 2016–H1 2018

No.	Producer	Capacity, t/a		
		2016	2017	H1 2018
1	<div style="border: 1px solid green; padding: 10px; text-align: center;"> <p>CCM</p> <p>http://www.cnchemicals.com/</p> </div>	XXX	XXX	XXX
2		XXX	XXX	XXX
...		XXX	XXX	XXX
15		XXX	XXX	XXX
		Others	XXX	XXX
	Total	XXX	XXX	XXX

Source: CCM

2.2 Major active PCl_3 producers in China, 2016–H1 2018


Table 2.2-1 Capacity of PCl_3 producers in China, 2016–H1 2018

No.	Producer	Capacity, t/a			
		2016	2017	H1 2018	
1	 CCM http://www.cnchemicals.com/	XXX	XXX	XXX	
2		XXX	XXX	XXX	
3		XXX	XXX	XXX	
...		XXX	XXX	XXX	
17		XXX	XXX	XXX	
18		XXX	XXX	XXX	
Others		XXX	XXX	XXX	
Total		XXX	XXX	XXX	

Source: CCM

2.4 Major active P_2O_5 producers in China, 2016–H1 2018


Table 2.4-1 Capacity of P_2O_5 producers in China, 2016–H1 2018

No.	Producer	Capacity, t/a		
		2016	2017	H1 2018
1	 CCM http://www.cnchemicals.com/	XXX	XXX	XXX
2		XXX	XXX	XXX
3		XXX	XXX	XXX
...		XXX	XXX	XXX
15		XXX	XXX	XXX
16		XXX	XXX	XXX
17		XXX	XXX	XXX
Others		XXX	XXX	XXX
Total		XXX	XXX	XXX

Source: CCM

2.6 Major active STPP producers in China, 2016–H1 2018

Table 2.6-1 Capacity of STPP producers in China, 2016–H1 2018

No.	Producer	Capacity, t/a		
		2016	2017	H1 2018
1	 http://www.cnchemicals.com/	XXX	XXX	XXX
2		XXX	XXX	XXX
3		XXX	XXX	XXX
...		XXX	XXX	XXX
19		XXX	XXX	XXX
20		XXX	XXX	XXX
Others		XXX	XXX	XXX
Total		XXX	XXX	XXX

Source: CCM

2.8 Major active SHMP producers in China, 2016–H1 2018


Table 2.8-1 Capacity of SHMP producers in China, 2016–H1 2018

No.	Producer	Capacity, t/a		
		2016	2017	H1 2018
1	 http://www.cnchemicals.com/	XXX	XXX	XXX
2		XXX	XXX	XXX
3		XXX	XXX	XXX
...		XXX	XXX	XXX
17		XXX	XXX	XXX
18		XXX	XXX	XXX
19		XXX	XXX	XXX
20		XXX	XXX	XXX
Others		XXX	XXX	XXX
Total		XXX	XXX	XXX

Source: CCM

2.10 Major active red phosphorus producers in China, 2016–H1 2018


Table 2.10-1 Capacity of red phosphorus producers in China, 2016–H1 2018

No.	Producer	Capacity, t/a		
		2016	2017	H1 2018
1	 http://www.cnchemicals.com/	XXX	XXX	XXX
2		XXX	XXX	XXX
3		XXX	XXX	XXX
4		XXX	XXX	XXX
5		XXX	XXX	XXX
6		XXX	XXX	XXX
Others		XXX	XXX	XXX
Total		XXX	XXX	XXX

Source: CCM

2.12 Major active SHPP producers in China, 2016–H1 2018

Table 2.12-1 Capacity of SHPP producers in China, 2016–H1 2018

No.	Producer	Capacity, t/a			
		2016	2017	H1 2018	
1	H	 http://www.cnchemicals.com/	XXX	XXX	XXX
2	S		XXX	XXX	XXX
3	C		XXX	XXX	XXX
...	S		XXX	XXX	XXX
11	H		XXX	XXX	XXX
12	H		XXX	XXX	XXX
13	S		XXX	XXX	XXX
14	V		XXX	XXX	XXX
Others			XXX	XXX	XXX
Total			XXX	XXX	XXX

Source: CCM

3.1 Review on the environmental protection policies related to phosphorus Industry, 2016–H1 2018

Table 3.1-1 Environmental protection policies related to phosphorus industry in China, 2016–H1 2018

Time	Publishing department	Policy	Content
Dec. 2016	 http://www.cnchemicals.com/		
June 2017			
...			
May 2018			
June 2018			


Source: CCM

Table 3.1-2 Environmental protection policies related to phosphate rock mining in different provinces in China, 2016–H1 2018

Time	Publishing department	Policy	Content
July 2017			n e w l,
July 2017			e 6
Aug. 2017			s s l,
Oct. 2017			a r d. n n k

Source: CCM

Table 3.1-3 Environmental protection policies related to phosphorus gypsum in China, 2016–H1 2018

Time	Publishing department	Policy	Content
Dec. 2016			
July 2017			
July, 2016			
Dec. 2016			
April 2018			

Source: CCM

...

If you want more information, please feel free to contact us

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