

Market Research of Sodium Tripolyphosphate in China

The First Edition

April 2020

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Introduction

Sodium tripolyphosphate (STPP), also known as tripolyphosphate or sodium triphosphate, is used widely in the manufacture of cleaning products and food preservatives, as well as in water treatment facilities. China has been the No.1 in STPP production and export around the globe for many years.

STPP consumption in China witnessed continuous increases in 2015–2019, especially in the food sector, which is the main driving force for the consumption increase. Meanwhile, consumption in industrial sectors has been almost stable since 2015.

Due to the tough situation of STPP global market, Chinese producers have to adjust their strategies to face the challenge. The supplies in China will decrease inevitably with the weak demand and increasing cost of raw material. However, the supply of STPP as food additives will be sufficient for its high profits.

How will this industry go in the coming years? This report presents an overview of market research of Sodium Tripolyphosphate in China, as well as a forecast on the industry future trend. You will definitely get some refreshing information on the Sodium Tripolyphosphate market in China from the report.

This report will illustrate the details for readers through the following aspects:

- Sodium Tripolyphosphate production in China, 2015–2019, including industrial grade and food grade
- Consumption of STPP on different areas in China, including food additives, surfactants and so on
- Forecast on supply and consumptions of Sodium Tripolyphosphate in China to 2022

Approach for this report

The research for the report is carried out by the following steps:

Desk research

The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, customs statistics, association seminars as well as information from the Internet. A lot of work went into compiling and analysing the information obtained. Where necessary, checks were made with the Chinese suppliers regarding market information such as production, demand, use, competition, etc.

Telephone interview

The interviewees cover:

- Producers
- Chemical experts
- Traders
- Local governments
- Researchers
- Associations
- Equipment suppliers
- Raw material suppliers

CCM carried out extensive telephone interviews with all manufacturers of STPP producers. Detailed production information and market situation were sourced and verified.

To directly analyse the imports and exports of STPP, many importers and exporters were contacted whenever the verification was needed.

Export analysis

Analysis of export data (HS code 28353110, 28353190) from the China Customs helps work out China's exports of STPP by producer, trader and destination.

Data processing and presentation

The data collected and compiled was sourced from:

- Published articles from Chinese periodicals, magazines, journals, the third-party database
- Government statistics & customs statistics
- Telephone interviews with Chinese producers, traders, governments and farmers
- Comments from industrial experts
- CCM's database
- Professional database in other sources
- Information from internet

The data from various ways have been combined to make this report as precise and scientific as possible. Throughout the process, a series of internal discussions took place in order to analyse the data and draw conclusions from it.

Report generation

Logical analysis and scientific ratiocination were conducted to generate the report, such as supply & demand analysis and crosscheck of all data. All the data and findings obtained through the above methods will be presented in the report clearly.

Glossary

In this report, frequent abbreviations are listed as follows:

TG: Industrial grade
 FG: Food grade
 STPP: Sodium tripolyphosphate

Unit

RMB: currency unit in China, also called yuan
 USD: currency unit in the US, also called US dollar
 t: tonne, equals to metric tonne in this report
 /t: per tonne
 t/a: tonne per year, tonne per annual
 t/d: tonne per day

Regions covered

In this report, Hubei Province, Sichuan Province, Chongqing Municipality, Guizhou Province, Yunnan Province and Jiangsu Province in China are mentioned.

Table Exchange rate USD/CNY, Jan. 2015–Dec. 2019

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
2015	6.1272	6.1339	6.1507	6.1302	6.1143	6.1161	6.1167	6.3056	6.3691	6.3486	6.3666	6.4476	6.2288
2016	6.5527	6.5311	6.5064	6.4762	6.5315	6.5874	6.6774	6.6474	6.6715	6.7442	6.8375	6.9182	6.6425
2017	6.8918	6.8713	6.8932	6.8845	6.8827	6.8019	6.7772	6.7148	6.5909	6.6493	6.6300	6.6067	6.7662
2018	6.5079	6.3045	6.3352	6.2764	6.3670	6.4078	6.6157	6.8293	6.8347	6.8957	6.9670	6.9431	6.6070
2019	6.8482	6.7081	6.6957	6.7193	6.7344	6.8896	6.8716	6.8938	7.0883	7.0726	7.0437	7.0262	6.8826

Source: The People's Bank of China

Executive summary

Production

Sodium tripolyphosphate (STPP), also known as tripolyphosphate or sodium triphosphate, is used widely in the manufacture of cleaning products and food preservatives, as well as in water treatment facilities. China has been the No.1 in STPP production and export around the globe for many years. China is also the biggest yellow phosphorus production base in the world. In 20XX, its STPP output was about XXX tonnes.

Many small producers quit the industry in recent years for the decreasing profits, declining demand and fierce competition. The large producers staying in the business have focused more on the food additive use. It is predicted that only few top producers will remain in the industry in the future.

Consumption

STPP consumption in China witnessed continuous increases in 20XX–20XX, especially in the food sector, which is the main driving force for the consumption increase. Meanwhile, consumption in industrial sectors has been almost stable since 20XX.

The domestic consumption of STPP has reached over XXX tonnes in 20XX.

Forecast on STPP supply and demand in China, 20XX–20XX

Due to the tough situation of STPP global market, Chinese producers have to adjust their strategies to face the challenge. The supply in China will decrease inevitably with the weak demand and increasing cost of raw material. However, the supply of STPP as food additives will be sufficient for its high profits.

It is predicted that food grade STPP demand will still increase, while that of industrial grade will be stable with small fluctuations.

What's in this report?

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

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1 STPP production in China

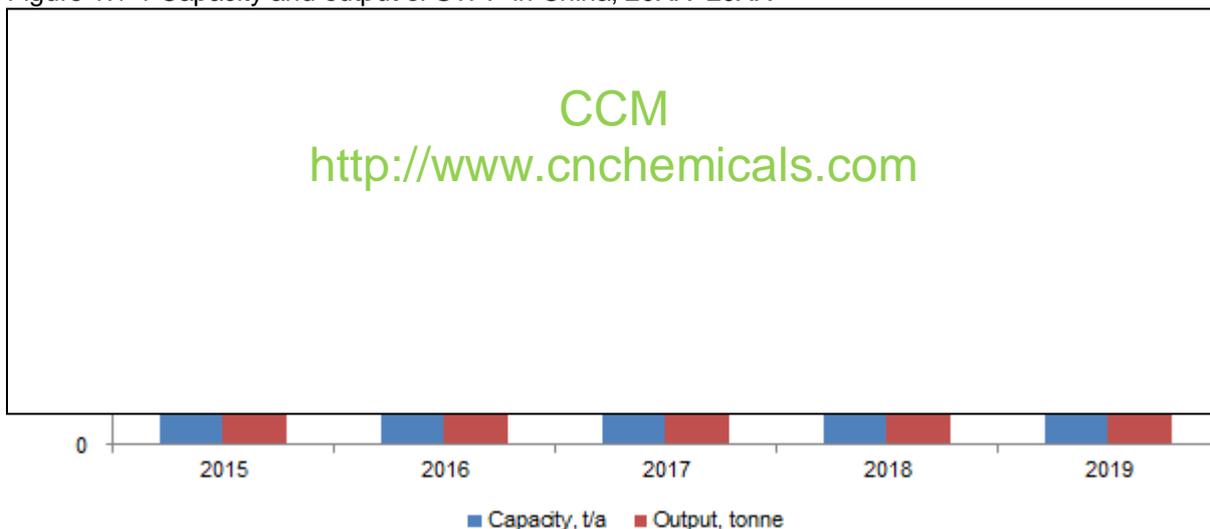
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1.1 STPP annual production in China (20XX–20XX)

Due to stricter environmental protection policies, constant export decreases and shrinking overall capacity, the output of STPP in China has declined continually in 20XX–20XX. The operating rate of Chinese STPP manufacturers ranges between XXX and XXX in this period. Only one new entrant joined STPP industry in the last five years.

Overall, from 20XX onwards, China's STPP output peaked in 20XX and then decreased year by year. China's STPP capacity has remained quite high, but more and more producers have adjusted their strategies to focus on domestic market and other application fields besides detergent, which might be good options for all Chinese producers.

Figure 1.1-1 Capacity and output of STPP in China, 20XX–20XX



Source: CCM

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In 20XX, STPP output from the top three provinces took up to around XX to the national total.

Table 1.1-1 Capacity and output of STPP in China by region, 20XX–20XX

Province/Municipality	Capacity, t/a					Output, tonne				
	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM

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Figure 1.1-2 Output share of STPP in China by region, 20XX



Source: CCM

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1.2 Major manufacturers of STPP in China

Table 1.2-1 Major manufacturers of STPP in China, 2015–2019

No.	Name	Abbreviation	Location	Situation				
				2015	2016	2017	2018	2019
1	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
2	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
3	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
4	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
5	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
6	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
7	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
8	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
9	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
10	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
11	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
12	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
13	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
14	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx

Source: CCM

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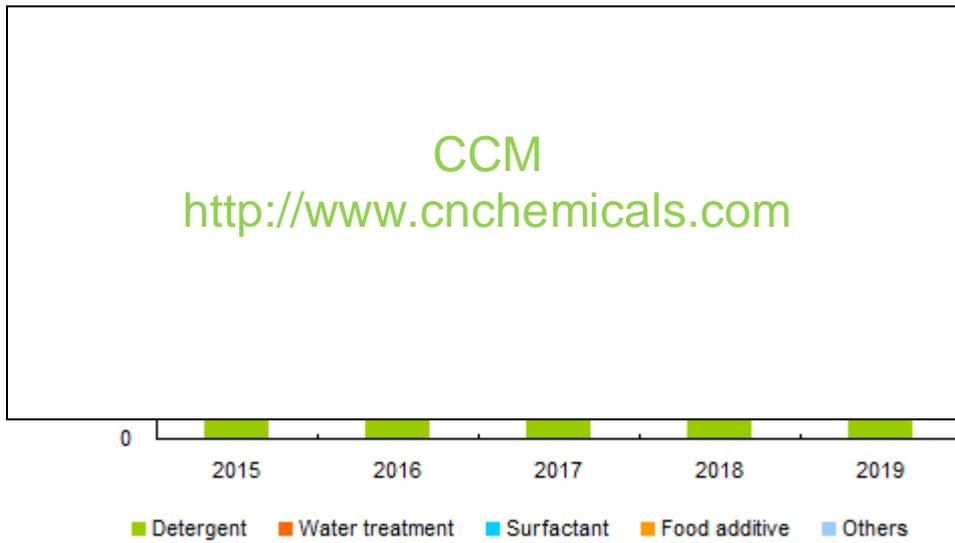
1.3 Production capacity and output of China's major STPP manufacturers (20XX–20XX)

Table 1.3-1 Capacity and output of major manufacturers in China, 20XX–20XX

No.	Name	Total capacity, t/a					Food grade output, tonne					Industrial grade output, tonne				
		2015	2016	2017	2018	2019	2015	2016	2017	2018	2019	2015	2016	2017	2018	2019
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
7	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
8	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
9	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
10	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
11	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
12	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
13	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
14	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total		XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM

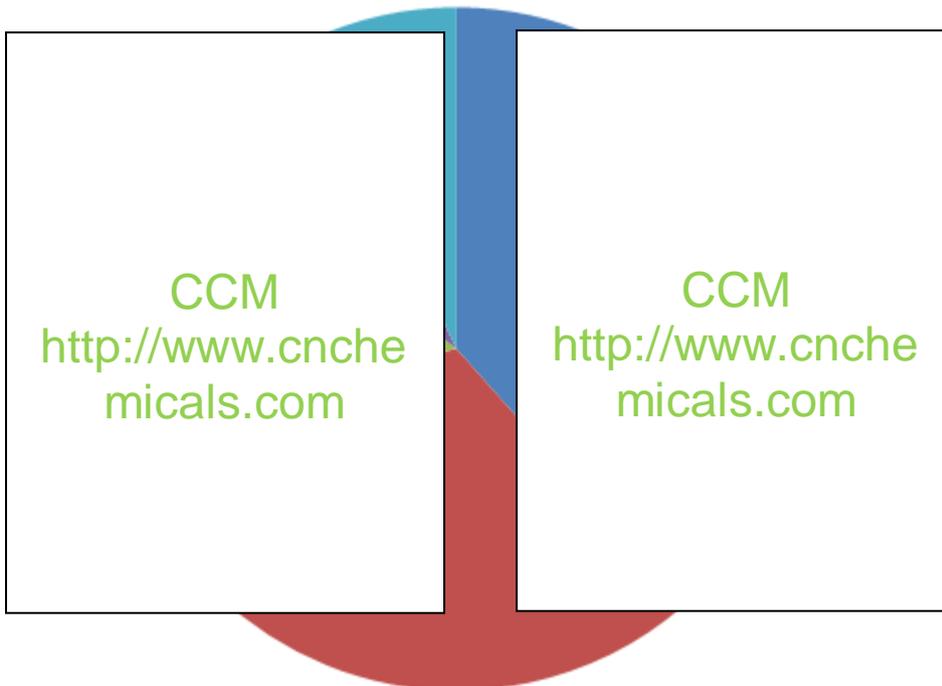
2 Consumption of STPP in China



Source: CCM

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Figure 2-2 Consumption of STPP in China, 20XX, tonne



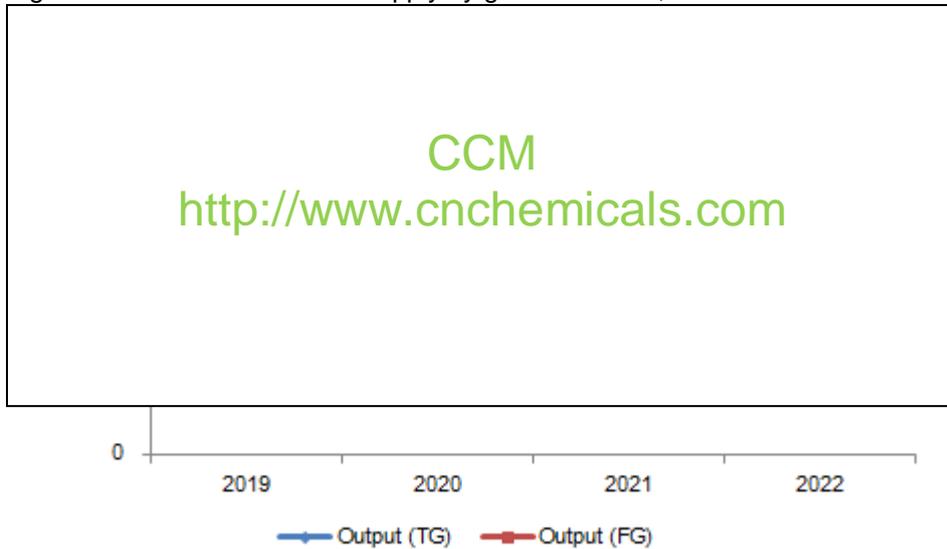
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3 CAGR 20XX–20XX for STPP TG and STPP FG

- Supply

Figure 3-1 Forecast on STPP supply by grade in China, 20XX–20XX

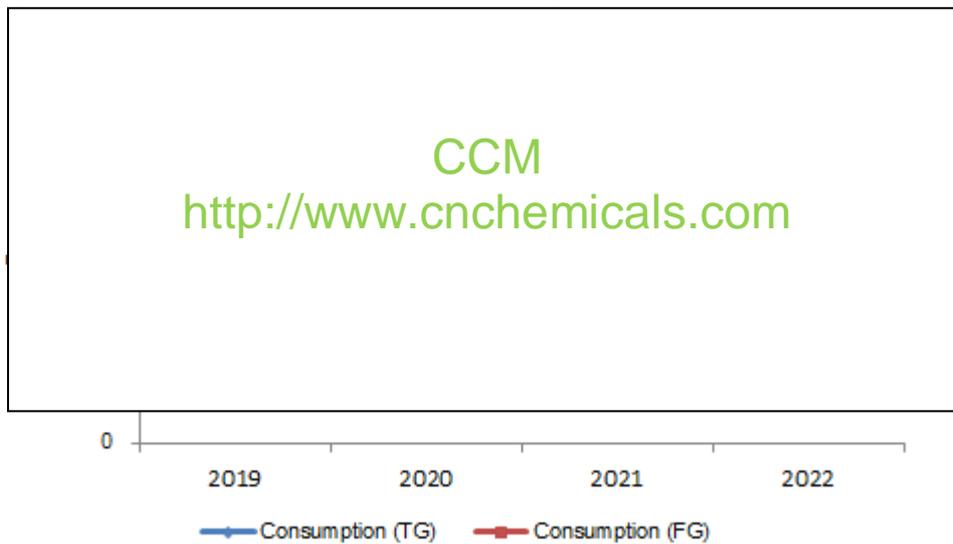


Source: CCM

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- Demand

Figure 3-2 Forecast on STPP consumption by grade in China, 20XX–20XX



Source: CCM

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