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A new Market Report on Potash, Phosphates, Secondary Nutrients and Micronutrients sectors Worldwide....

THE MINERAL FERTILIZERS INDUSTRY WORLDWIDE 2010-2015: A MARKET / TECHNOLOGY REPORT

By Alison Russell

ISBN 1 871677 61 0 (Published September 2010)

The report provides in-depth information on:

- **Supply and demand forecasts for mineral fertilizers to 2015**
- **Potash production and consumption in key countries**
- **Phosphate rock production and consumption in key countries**
- **Phosphate and potash fertilizer markets and trade**
- **Import and exports for potash and phosphate fertilizers**
- **Sulphur for fertilizers – production and consumption**
- **Review of production and markets for secondary nutrients, including boron, copper, iron, manganese, molybdenum, and zinc**
- **Micronutrients: market forecasts to 2015**
- **Trends in key consuming countries/ regions – North America, South America, Asia, Europe**
- **Trends in key producing countries/regions – North America, South America, Asia, Europe**
- **Forecast trends in mineral fertilizer prices to 2015**
- **Profiles of major companies worldwide supplying mineral fertilizers – information concerning their size, market position and financial performance, including subsidiary companies**
- **Over 250 pages and 180 tables**

Available NOW – The Mineral Fertilizers Industry Worldwide 2010-2015, an in-depth market report on the current status and future prospects for mineral fertilizers, secondary nutrients and micronutrients worldwide. The +250 page study provides comprehensive data on production, consumption, imports/exports and growth rates for these important sectors. It also gives details of the activities of key multinational, regional and domestic producers.

Mineral fertilizers such as potash and phosphates, together with secondary nutrients such as sulphur, as well as micronutrients, will play an increasingly important role as demand for higher yields from existing agricultural land continues to grow as the world's population rapidly expands. Trends that determine the production and consumption of minerals for fertilizers now and over the next five years are analysed. In terms of both phosphate and potash, there are existing capacity expansions and new greenfield operations planned to meet future demand. For potash in particular, there has been much activity, with over 50 projects underway in 15 countries.

There has been a change in end use patterns for mineral fertilizers over the last decade, as the world's population continues to grow and greater efficiency in crop production is demanded. In particular, there is a drive towards more balanced fertilization, which will result in higher phosphate and potash consumption levels at given nitrogen application levels. This will also have the effect of increasing powdered and granular mono-ammonium phosphate (MAP) production, and some diammonium phosphate (DAP) being used in NPK production or bulk blends.

Global phosphate rock production is forecast to increase to 163 million tonnes in 2010, and continue to climb until reaching 195 million tonnes by 2015. If all planned expansions go ahead and new mining projects come on stream, then phosphate rock capacity will be as high as 250 million tonnes by 2015. The major producer is China, which overtook the USA in 2005 as the leading global producer of phosphate rock. In terms of international trade, Morocco is the leading exporter of phosphate rock.

In 2009, global phosphate fertilizer (P_2O_5) consumption was an estimated 38.5 million tonnes; this is predicted to grow to 41 million tonnes in 2010. By 2015, consumption is forecast to rise to 45.2 million tonnes. The highest growth will be in Asia, dominated by China and India, followed by Latin America.

Global potash (K_2O) production declined significantly in 2009, due to the global economic downturn that began in late 2008, although production levels are anticipated to bounce back in 2010 to 37 million tonnes. By 2015, potash output is forecast to reach 47.2 million tonnes. Worldwide potash capacity is also expanding and by 2015 could reach 55 million tonnes if all potential projects go ahead. However, depending on the economic situation, many smaller projects may find it difficult to raise the necessary finance for such schemes. The expansions and new operations put forward by leading existing producers are the ones most likely to come on-stream.

The secondary nutrients include sulphur, magnesium and calcium carbonate, whilst the suite of micronutrients includes boron, copper, iron, manganese, molybdenum and zinc. Globally, consumption of sulphur in fertilizers is estimated at 32 million tonnes in 2010, rising to 36.2 million tonnes in 2015. Growth is largely due to the demand for sulphuric acid for phosphoric acid based fertilizers and the recognition that sulphur deficiencies in soils in certain countries need to be addressed if crop output is to increase to meet demand. Consumption of micronutrients is forecast to grow accordingly and is predicted to reach 825,000 tonnes by 2015. The largest market for micronutrients is in Asia, which accounts for over 60% of micronutrient demand.

These and many other facts and figures are given in **The Mineral Fertilizers Industry Worldwide 2010-2015**. The +250 page report features 180 tables.

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ABOUT THE AUTHOR

With over twenty years experience in the industrial minerals industry, Alison Russell is an independent consultant who has written many market research reports and articles on industrial mineral Industries and consuming industries. She graduated with BEng degree in Minerals Engineering from the University of Leeds, UK, and then joined Industrial Minerals magazine in London. She became Deputy Editor, and then launched Mineral PriceWatch and Industrial Minerals Research. She also worked for a major minerals trading company as a Business Development Analyst.

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Established in 1985, Materials Technology Publications specialises in the publication of market reports within the area of industrial materials. Each report analyses the current and future prospects for specific industries and provides pertinent statistical data on production, growth rates, imports, exports, etc. Key companies are identified and their performances compared. The impact of advances in production methods and materials technology is also assessed.

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