



Strategic Business Analysis: Phosphate Rock

“Phosphate Rock” is an upcoming Supplement Report to be published as part of the Strategic Business Analysis (SBA) Program.

Report Overview

More than 70 percent of the global phosphate rock is consumed in the production of phosphoric acid, while the remaining is used in production of phosphate fertilizers and some industrial applications. Population growth is one of the main drivers of the consumption of phosphate rock in China. However, the government policy to attain zero percent fertilizer consumption growth may slow down the phosphate rock consumption in the region. India, which is a leading importer of phosphate rock globally, depends heavily on government subsidies for the consumption of fertilizers. Brazil’s phosphate consumption is driven by the usage in the production of biofuel crops.

Phosphate rock is a non-renewable natural resource. As such, there are concerns that phosphate rock reserves are being depleted around the world. In the past decade, main producers such as China, Morocco (and Western Sahara), and the United States have seen their reserves decline. However, during the same period, new phosphate rock mines have been developed in countries such as Algeria, Jordan, and Peru. The availability to develop new mines or expand existing ones depends on E&P activity, water resources, and capital. The impact of the new mine developments, and of the increased production expected in Africa and Middle East, on the global phosphate rock trade and consumption dynamics remains to be seen.

Nexant’s new Supplement Report: Phosphate Rock will identify the strategic trends and issues that will shape the phosphates industry based upon a review of the fundamental business drivers and their dynamics, covering global markets and pricing outlook (2000-2035), and mining & beneficiation process developments. Cost competitiveness for phosphate fertilizers production versus phosphate rock imports in key markets will also be discussed.

The report will address key questions, including:

- Will China and India continue to be the major growth drivers for phosphate rock consumption?
- How will the improvements in production efficiency impact the supply outlook for phosphate rock?
- What will be the impact of India’s New Urea Policy 2015 on the demand for phosphate fertilizers, and phosphate rock in India?
- Given the discovery of new mines such as in Peru, what will be the effect on the regional trading pattern in the coming years?
- What will be the impact of different oil scenarios on long term phosphate rock prices?
- Would it be more economical to import phosphate fertilizers or import phosphate rock?

Report Content

- Production Process Overview
 - Phosphate mining and beneficiation process overview, with focus on new developments
 - Discussion on phosphate grades and quality
- Market Dynamics
 - Historical analysis and forecasts to 2035 of consumption, production, net trade
 - Nine main global regions covered in the analysis
- Pricing
 - Geographical coverage includes U.S., Morocco, and China
 - Analysis of pricing influences and future price-setting
 - Historical and long-term price forecasts to 2035
- Delivered Cost Competitiveness
 - Production costs analysis for phosphate fertilizers
 - Competitiveness analysis of key in-market producers and exporters to the major consuming markets
- Strategic Business Analysis
 - Discussion of environmental issues related to mining
 - SWOT analysis for new market entrants in major phosphate markets

Methodology

- NexantThinking™ supply/demand and pricing forecasts are prepared using a proprietary simulation model of the global petrochemical and fertilizer industries
- Nexant will draw on industry data from prior (non-confidential) commercial analyses
- Nexant has a global team of market researchers and analysts monitoring developments in regional markets
- Nexant will utilize expertise of mining industry veterans

Subscription Details

The new Phosphate Rock Supplement will be available for purchase as an add-on to the SBA Program Subscription (covering ammonia, urea and ammonium nitrates), as well as a single report. Deliverables include:

- One hard copy of published report
- Unlimited downloads of PDF copy from thinking.nexant.com
- Excel file with market and pricing data
- Consultation time with Nexant team
- Client presentations and Webinars



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