

Industrial Phosphates

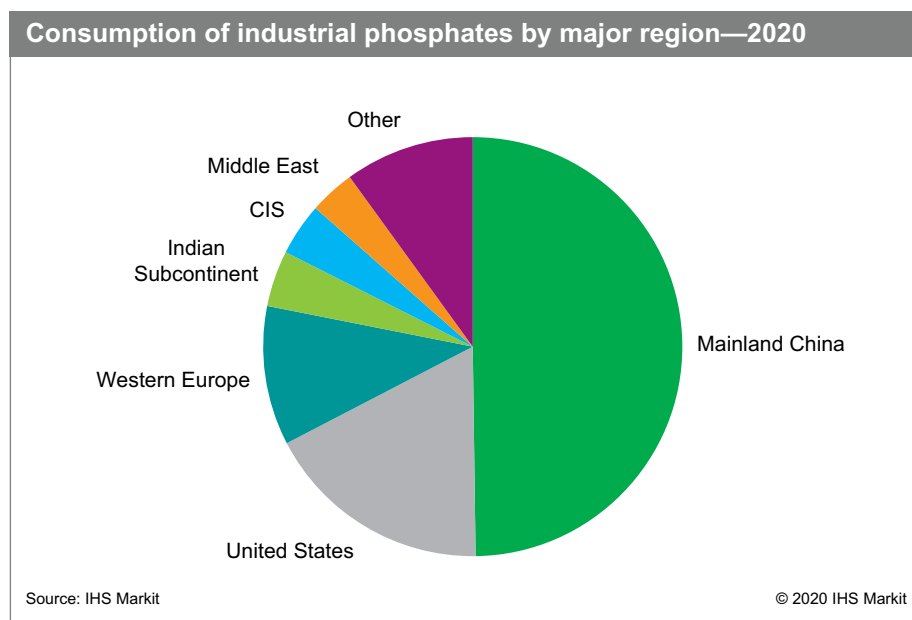
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Abstract

The industrial phosphate market is a minor but important segment of the total phosphate market. Fertilizer and feed are the major outlets for phosphates. Industrial phosphates are used in a broad range of end uses including food, detergents, personal hygiene, and construction and account for only around 6–8% of global phosphate consumption.

Detergents, which used to be the largest end use for industrial phosphates, have been affected by environmental pressure, and consumption has declined significantly. Producers are focusing on creating new markets in food and horticultural applications to counter the decrease in demand from the detergent industry.

The following pie chart shows consumption of industrial phosphates by major region:



From 2015 to 2019, the industrial phosphates markets experienced steady growth, but the recession resulting from the COVID-19 pandemic led to minimal growth in 2020, with up to 8% declines, depending on the region and the end-use application. The effect was less pronounced in mainland China than in the United States and Western Europe. Many of the markets for industrial phosphates were less-affected by the downturn, or have even grown between 2019 and 2020, including food and beverages, detergent builders and cleaners, specialty agricultural products, and pharmaceuticals. Overall growth for industrial phosphates is expected to increase worldwide in line with average gross domestic product growth between 2020 and 2025.

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Environmental concerns will continue to have a strong influence on phosphate demand in detergents in much of the world. In Western Europe and North America, legislation reducing phosphate content in automatic dishwashing detergents has led to further declines in recent years. Sodium phosphates' rapid contraction is expected to stabilize, however, as producers have begun to identify new markets in food, horticulture, and water treatment applications. In addition, phosphate builders still account for a considerable portion of detergent segments in regions where bans do not currently exist and in industrial and institutional cleaners, where greater cleaning effectiveness is required.

For more detailed information, see the table of contents, shown below.

IHS Markit's Chemical Economics Handbook – *Industrial Phosphates* is the comprehensive and trusted guide for anyone seeking information on this industry. This latest report details global and regional information, including



Global summary;
regional coverage



Producers with
annual capacities
and plant sites



Production figures
and trends



Consumption and
forecasts by end use
application



Manufacturing
processes and
environmental issues



Trade – imports
and exports

Key benefits

IHS Markit's Chemical Economics Handbook – *Industrial Phosphates* has been compiled using primary interviews with key suppliers and organizations, and leading representatives from the industry in combination with IHS Markit's unparalleled access to upstream and downstream market intelligence and expert insights into industry dynamics, trade, and economics.

This report can help you

- Identify trends and driving forces influencing chemical markets
- Forecast and plan for future demand
- Understand the impact of competing materials
- Identify and evaluate potential customers and competitors
- Evaluate producers
- Track changing prices and trade movements
- Analyze the impact of feedstocks, regulations, and other factors on chemical profitability

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