

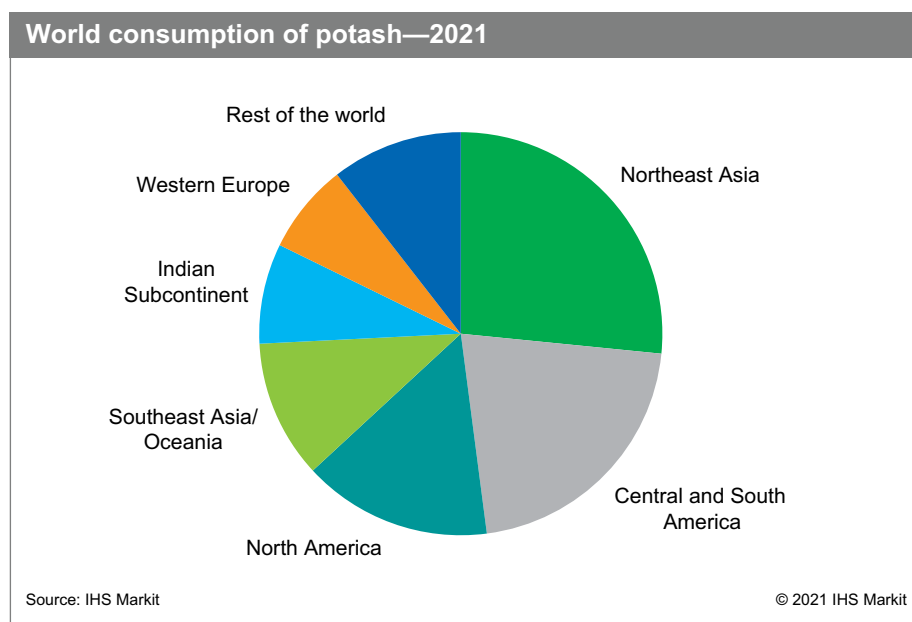
# Potash

July 2021

## Abstract

Potassium (K), which occurs both in the Earth's crust and in its bodies of water, is the third major fertilizer nutrient, after nitrogen and phosphorus. The term *potash* is used to describe a wide variety of minerals and chemicals valued for their potassium content. Potassium chloride (KCl) is the most common and least expensive source of potash. Approximately 90% of total potash consumption is for fertilizer use, with the balance being consumed in a variety of industrial applications. Most of the potash-consuming countries have large agricultural bases and require imports to meet fertilizer demand.

The following pie chart shows world consumption of potash:



The CIS and Baltic States and North America are the major regional producers, together accounting for more than two-thirds of world production. The major potash producers are Nutrien and The Mosaic Company in Canada, Uralkali in Russia, and Belaruskali in Belarus. Potassium chloride accounts for more than 95% of world potash production; potassium sulfate compounds account for most of the remainder.

Fertilizer demand is driven by growing populations' food requirements, as well as the switch from a carbohydrate-based regimen to a protein-rich diet. As the global population increases, the need for food and the nutrients required to produce food correspondingly increase. Demand for food directly influences potash

## Contacts

IHS Markit Customer Care • [CustomerCare@ihsmarkit.com](mailto:CustomerCare@ihsmarkit.com)

production. Although crop prices and the timing of purchases may affect short-term demand, growth is definite in the medium to long term. The global population is expected to grow at an annual rate of slightly over 1% during the forecast period. Increased meat consumption will drive livestock production, which consumes crops like corn as feed, which in turn increases the requirement for potash. Demand will also come from the production of regulatory-driven biofuels, including ethanol and biodiesel, as there will be an increasing requirement to cultivate more corn, sugarcane, and palm crops.

Mainland China is the largest consumer of potash, followed by Brazil and the United States. With so few producing countries, much of the world is heavily dependent upon imports to satisfy potash requirements. World trade in potash is very significant, accounting for more than 80% of world production during the past five years.

The potential world potash supply and demand conditions over the next five years will be determined by the balance between the potential supply from expanding capacity and the growing demand for fertilizer use from food requirements.

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

**IHS Markit's Chemical Economics Handbook – Potash** 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 – Potash** 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

# Contents

<b>Executive summary</b>	<b>7</b>
<b>Summary</b>	<b>8</b>
<b>Introduction</b>	<b>10</b>
<b>Geological occurrence, mining, and beneficiation</b>	<b>12</b>
Geological occurrence	12
Beneficiation	13
– Potassium chloride	13
– Potassium sulfate	14
– Potassium sulfate ores	14
– Langbeinite ore	14
– Kainite ore	14
– Hartsalz ore	14
– Potassium sulfate manufacture	14
– Mannheim process	14
– Hargreaves process	14
– Trona process (from Searles Lake brines)	15
– Potassium magnesium sulfate	15
– Potassium nitrate	15
– Nitric acid and potassium chloride	16
– Sodium nitrate and potassium chloride	16
– Nitrogen dioxide and potassium chloride	16
– Ammonium nitrate and potassium chloride	17
– Phosphoric, nitric acids, and potassium chloride	17
– Phosphoric acid, ammonium nitrate, and potassium chloride	17
<b>Environmental issues</b>	<b>18</b>
<b>Supply and demand by region</b>	<b>19</b>
World	19
– Reserves	19
– Salient statistics	19
– Capacity	20
– Production	21
– Consumption	23
– Price	24
– Trade	24
United States	27
– Producing companies	27
– Salient statistics	30
– Production	30
– Consumption	31
– Fertilizer	32

– Industrial	34
– Price	34
– Trade	35
Canada	37
– Producing companies	37
– Salient statistics	42
– Production	43
– Consumption	43
– Price	44
– Trade	45
Mexico	45
– Producing companies	45
– Salient statistics	45
– Consumption	46
– Trade	46
Central and South America	47
– Producing companies	47
– Salient statistics	51
– Production	51
– Consumption	52
– Price	53
– Trade	54
Western Europe	55
– Producing companies	55
– Salient statistics	60
– Production	60
– Consumption	61
– Price	63
– Trade	63
Central Europe	65
– Producing companies	65
– Salient statistics	65
– Consumption	66
– Trade	67
CIS and Baltic States	69
– Producing companies	69
– Salient statistics	73
– Production	74
– Consumption	74
– Price	75
– Trade	75
Middle East	77
– Producing companies	77

– Salient statistics	79
– Production	80
– Consumption	81
– Price	82
– Trade	82
<b>Africa</b>	<b>84</b>
– Producing companies	84
– Salient statistics	84
– Consumption	85
– Trade	86
<b>Indian Subcontinent</b>	<b>88</b>
– Producing companies	88
– Salient statistics	88
– Consumption	89
– Trade	90
<b>Northeast Asia</b>	<b>92</b>
– Mainland China	92
– Producing companies	92
– Salient statistics	94
– Production	95
– Consumption	97
– Price	98
– Trade	98
– Japan	99
– Producing companies	99
– Salient statistics	99
– Consumption	100
– Trade	100
– Other Northeast Asia	101
– Producing companies	101
– Salient statistics	101
– Consumption	102
– Trade	103
<b>Southeast Asia and Oceania</b>	<b>105</b>
– Southeast Asia	105
– Producing companies	105
– Salient statistics	105
– Consumption	106
– Trade	107
– Oceania	109
– Producing companies	110
– Salient statistics	110
– Consumption	111

– Trade	112
<b>Additional resources</b>	<b>114</b>
<b>Revisions</b>	<b>115</b>
<b>Data Workbook</b>	<b>116</b>
<b>Notice</b>	<b>117</b>

## IHS Markit Customer Care

CustomerCare@ihsmarkit.com

### **Asia and the Pacific Rim**

Japan: +81 3 6262 1887

Asia Pacific: +604 291 3600

**Europe, Middle East, and Africa: +44 (0) 1344 328 300**

**Americas: +1 800 447 2273**

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