

Sulfur Chemicals, Miscellaneous

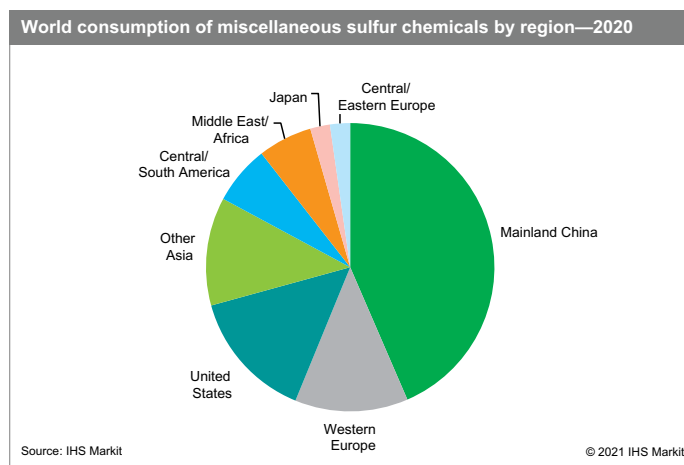
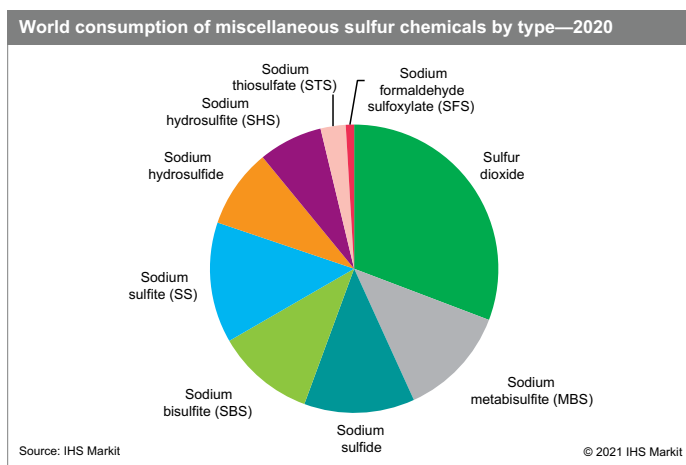
31 December 2020

Abstract

This report reviews the merchant markets for sulfur dioxide and other miscellaneous sulfur chemicals: sulfur dioxide, sodium hydrosulfide, sodium hydrosulfite, sodium sulfide, sodium sulfites, sodium thiosulfate, and sodium formaldehyde sulfoxylate. Although demand into sulfuric acid is noted for some regions, full discussion of that market can be found in the CEH *Sulfuric Acid* report.

Consumption of these compounds varies widely by region, depending on the regional requirements for the major end-use markets—reducing and bleaching agents in the pulp and paper and textile industries, as well as in the photographic and food industries, and as precipitating and reducing agents in the treatment of water.

The following pie charts show world consumption of miscellaneous sulfur chemicals by type and by region:



Where competing products exist, liquid sulfur dioxide is almost always the lowest-cost alternative. However, concerns over safety in transport, handling, storage, and use are often the impetus for substitution. Competing products in some applications include sodium sulfites (SS, SBS, and MBS) and sodium thiosulfate, which can either be coproducts in the manufacture of liquid sulfur dioxide or produced directly/captively from a liquid sulfur dioxide feed.

The markets that are anticipated to experience the largest growth over the forecast period include mineral ore processing, oil recovery, and use as a chemical intermediate for other sulfur compounds, including the manufacture of ammonium bisulfite, ammonium thiosulfate, and polyphenylene sulfide (PPS) resins.

Although developing regions may experience higher-than-average demand in some applications, the majority of end-use markets are mature and reflect very little and even declining growth. Furthermore, the growth potential for sulfur dioxide

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remains challenged by mounting regulations and environmental pressures, as well as the high risks and costs associated with handling and transportation.

Mainland China has taken a leading position for most derivative markets and has become the major global supplier. The rapid development in mainland China's metal manufacturing (smelting operations) as well as increased demand for sulfuric acid in domestic fertilizer production has propelled the mainland Chinese sulfur industry. This expansion occurred at the same time as implementation of a series of environmental regulations to reduce sulfur dioxide emissions, which resulted in an overall contraction in most industrialized regions. Derivative manufacture will remain a primary outlet for mainland Chinese sulfur dioxide, particularly as efforts to further reduce emissions take hold.

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

IHS Markit's Chemical Economics Handbook – *Sulfur Chemicals, Miscellaneous* 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 – *Sulfur Chemicals, Miscellaneous* 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

Executive summary	13
Summary	14
Sulfur dioxide	15
Sodium hydrosulfide	16
Sodium hydrosulfite	16
Sodium sulfide	17
Sodium sulfites	18
Sodium thiosulfate	21
Sodium formaldehyde sulfoxylate	22
Introduction	24
Markets	25
Pulp and paper	25
Leather industry	25
Food processing	25
Water treatment	25
Textile dyeing	25
Photography	26
Kaolin bleaching	26
Manufacturing processes	27
Sulfur dioxide	27
Sodium hydrosulfide	28
Sodium hydrosulfite	28
– Sodium formate process	28
– Mercury amalgam and electrolytic	28
– Zinc sodiation process	29
– Borohydride-generated hydrosulfite (BGH)	29
Sodium sulfide	30
Sodium sulfite	31
Sodium thiosulfate	32
Sodium formaldehyde sulfoxylate	33
Supply and demand by region	34
United States	34
– Sulfur dioxide	34
– Producing companies	34
– Salient statistics	35
– Consumption	35
– Price	37
– Trade	38
– Imports	38
– Exports	39

– Sodium hydrosulfide	39
– Producing companies	39
– Salient statistics	41
– Consumption	42
– Mineral processing	42
– Pulp and paper	42
– Chemicals and dyes	43
– Leather processing	43
– Other	43
– Price	43
– Trade	44
– Imports	45
– Exports	45
– Sodium hydrosulfite	46
– Producing companies	46
– Salient statistics	47
– Consumption	47
– Paper pulp bleaching	48
– Clay leaching	48
– Textile dyeing	49
– Price	50
– Trade	51
– Imports	51
– Exports	51
– Sodium sulfide	52
– Producing companies	52
– Salient statistics	53
– Consumption	53
– Mineral processing	54
– Pulp and paper	54
– Chemicals and dyes	54
– Leather processing	54
– Other	55
– Price	55
– Trade	55
– Sodium sulfites	56
– Overview	56
– Producing companies	56
– Salient statistics	58
– Sodium sulfite	59
– Producing companies	59
– Salient statistics	59
– Consumption	60

– Price	61
– Trade	61
– Sodium metabisulfite	62
– Producing companies	62
– Salient statistics	62
– Consumption	63
– Trade	63
– Sodium bisulfite (SBS)	64
– Producing companies	64
– Salient statistics	64
– Consumption	65
– Sodium thiosulfate	65
– Producing companies	65
– Salient statistics	65
– Consumption	66
– Dry	67
– Solution	67
– Price	67
– Trade	68
– Sodium formaldehyde sulfoxylate	69
– Salient statistics	69
– Consumption	70
– Trade	70
Canada	71
– Sulfur dioxide	71
– Producing companies	71
– Salient statistics	71
– Consumption	72
– Trade	73
– Sodium hydrosulfide	74
– Salient statistics	74
– Consumption	75
– Trade	75
– Sodium hydrosulfite	76
– Producing companies	76
– Salient statistics	77
– Consumption	78
– Price	79
– Trade	79
– Sodium sulfide	80
– Salient statistics	81
– Consumption	81
– Trade	81

– Sodium sulfites	81
– Sodium sulfite (SS)	82
– Sodium metabisulfite (MBS)	83
– Sodium bisulfite solution (SBS)	83
– Producing companies	83
– Salient statistics	84
– Consumption	84
– Sodium thiosulfate	85
– Sodium formaldehyde sulfoxylate (SFS)	85
Mexico	85
– Sulfur dioxide	86
– Salient statistics	86
– Consumption	86
– Trade	86
– Sodium hydrosulfide	87
– Producing companies	87
– Salient statistics	87
– Consumption	88
– Trade	88
– Sodium hydrosulfite	89
– Consumption	89
– Price	89
– Imports	90
– Sodium sulfide	91
– Producing companies	91
– Salient statistics	91
– Consumption	91
– Trade	91
– Sodium sulfites	92
– Producing companies	92
– Salient statistics	92
– Consumption	93
– Trade	93
– Sodium thiosulfate	94
– Producing companies	94
– Salient statistics	94
– Consumption	94
– Trade	94
– Sodium formaldehyde sulfoxylate	95
Central and South America	95
– Sulfur dioxide	96
– Producing companies	96
– Salient statistics	96

– Consumption	97
– Trade	97
– Sodium hydrosulfide	98
– Producing companies	98
– Salient statistics	98
– Consumption	99
– Mineral processing	99
– Leather processing	99
– Other	100
– Trade	100
– Imports	100
– Exports	101
– Sodium hydrosulfite	102
– Salient statistics	102
– Consumption	103
– Trade	103
– Sodium sulfide	104
– Producing companies	104
– Salient statistics	105
– Consumption	106
– Trade	106
– Imports	106
– Exports	107
– Sodium sulfites	108
– Producing companies	108
– Salient statistics	108
– Consumption	111
– Trade	111
– Imports	111
– Exports	112
– Sodium thiosulfate	113
– Producing companies	113
– Salient statistics	113
– Consumption	113
– Trade	114
– Sodium formaldehyde sulfoxylate	115
– Salient statistics	115
– Consumption	116
– Trade	116
Western Europe	117
– Sulfur dioxide	118
– Producing companies	118
– Salient statistics	120

– Production	120
– Consumption	120
– Price	122
– Trade	122
– Sodium hydrosulfide	123
– Producing companies	123
– Salient statistics	124
– Consumption	125
– Chemical processing and textile dyeing	126
– Pulp processing	126
– Water treatment/mining	126
– Leather processing	126
– Trade	127
– Sodium hydrosulfite	127
– Producing companies	127
– Salient statistics	128
– Consumption	129
– Pulp and paper industry	130
– Textile industry	130
– Kaolin and other	131
– Price	131
– Trade	131
– Sodium sulfide	132
– Producing companies	132
– Salient statistics	132
– Consumption	133
– Price	134
– Trade	134
– Sodium sulfites	134
– Producing companies	134
– Salient statistics	135
– Production	139
– Consumption	139
– Sodium sulfite	139
– Sodium metabisulfite	140
– Sodium bisulfite	140
– Price	140
– Trade	140
– Sodium thiosulfate	141
– Producing companies	141
– Salient statistics	141
– Consumption	142
– Price	143

– Trade	143
– Sodium formaldehyde sulfoxylate	144
– Producing companies	144
– Salient statistics	144
– Consumption	145
– Price	145
– Trade	145
Central and Eastern Europe	145
– Sulfur dioxide	146
– Sodium hydrosulfide	147
– Sodium hydrosulfite	150
– Sodium sulfides	151
– Sodium sulfites	154
– Salient statistics	155
– Consumption	157
– Trade	158
– Sodium thiosulfate	160
– Salient statistics	160
– Consumption	161
– Trade	162
– Sodium formaldehyde sulfoxylate	163
Middle East and Africa	163
– Sulfur dioxide	165
– Producing companies	165
– Salient statistics	165
– Consumption	166
– Trade	166
– Sodium hydrosulfide	166
– Producing companies	166
– Salient statistics	167
– Consumption	168
– Trade	169
– Sodium hydrosulfite	170
– Producing companies	170
– Salient statistics	170
– Consumption	171
– Trade	171
– Sodium sulfide	172
– Producing companies	172
– Salient statistics	172
– Consumption	173
– Trade	173
– Sodium sulfites	176

– Producing companies	176
– Salient statistics	177
– Consumption	179
– Trade	180
– Sodium thiosulfate	181
– Salient statistics	181
– Consumption	182
– Trade	182
– Sodium formaldehyde sulfoxylate	183
– Salient statistics	183
– Consumption	184
– Trade	184
Asia	185
– Mainland China	185
– Sulfur dioxide	185
– Producing companies	185
– Salient statistics	186
– Consumption	187
– Price	188
– Trade	188
– Sodium hydrosulfide	188
– Producing companies	188
– Salient statistics	189
– Consumption	190
– Price	191
– Trade	191
– Sodium hydrosulfite	193
– Producing companies	193
– Salient statistics	194
– Consumption	195
– Price	195
– Trade	196
– Sodium sulfide	197
– Producing companies	197
– Salient statistics	198
– Consumption	199
– Price	200
– Trade	200
– Sodium sulfites	201
– Producing companies	201
– Salient statistics	203
– Consumption	205
– Price	207

– Trade	207
– Sodium thiosulfate	209
– Producing companies	209
– Salient statistics	209
– Consumption	210
– Price	211
– Trade	211
– Sodium formaldehyde sulfoxylate	212
– Producing companies	212
– Salient statistics	213
– Consumption	213
– Price	214
– Trade	214
– Other Asia	215
– Sulfur dioxide	215
– Producing companies	215
– Salient statistics	216
– Consumption	217
– Price	217
– Trade	217
– Sodium hydrosulfide	217
– Producing companies	217
– Salient statistics	218
– Consumption	219
– Price	220
– Trade	220
– Sodium hydrosulfite	220
– Producing companies	220
– Salient statistics	221
– Consumption	221
– Price	222
– Trade	222
– Sodium sulfide	223
– Producing companies	223
– Salient statistics	224
– Consumption	225
– Price	225
– Trade	225
– Sodium sulfites	225
– Producing companies	225
– Salient statistics	226
– Consumption	229
– Price	230

– Trade	230
– Sodium thiosulfate	231
– Producing companies	231
– Salient statistics	232
– Consumption	233
– Price	234
– Trade	234
– Sodium formaldehyde sulfoxylate	234
– Producing companies	234
– Salient statistics	235
– Consumption	236
– Trade	236
– Imports	236
– Exports	236
Additional resources	238
Revisions	239
Data Workbook	240

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