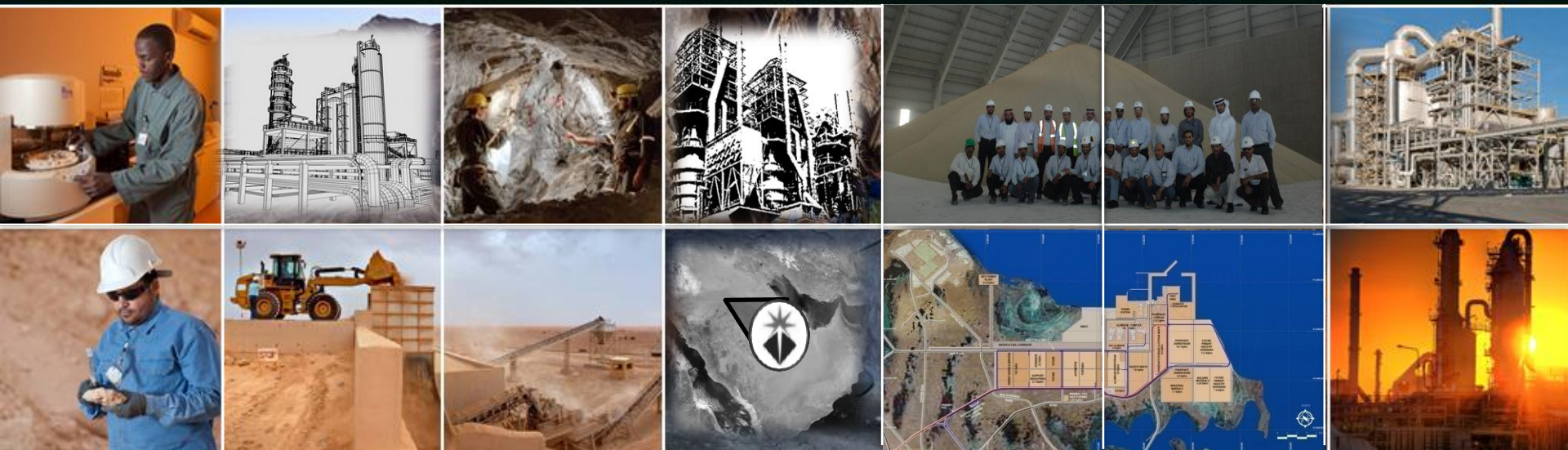




## 5th Industrialists Forum 2013

### “Investment opportunities in the downstream Petro-chemicals & Minerals”

#### Phosphate Downstream Opportunities



# Phosphate



# Disclaimer Note

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# Ma'aden's Phosphate Vision

To Be Among The Leading Phosphate Players



# Global Trends Indicate Sustained Demand For Phosphate As A Key Ingredient Of Fertilizers & Downstream industries



**Increased demand for food driven by a growing population**



**Growing usage of phosphate fertilizers in agriculture**

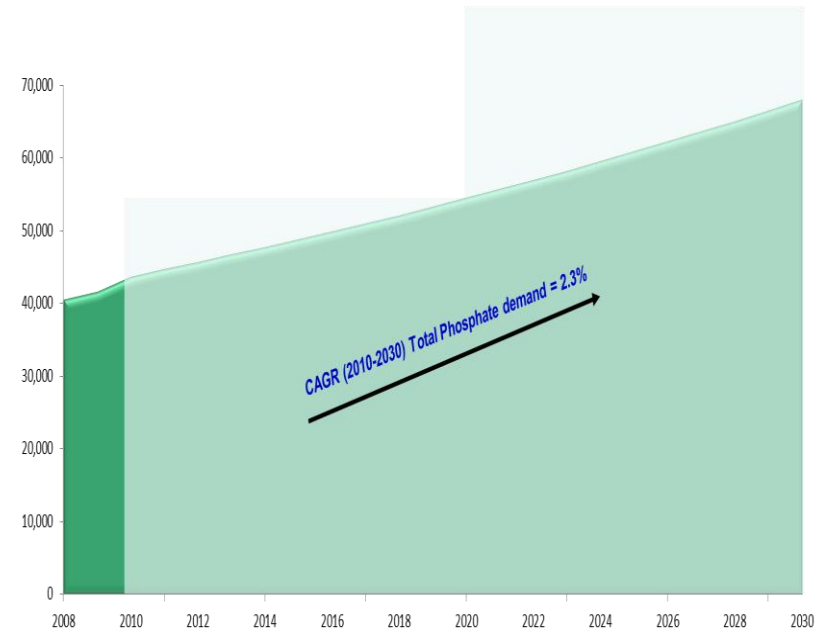


**Increased use of fertilizers to achieve higher yields as arable land per capita declines**



**Growth in biofuels will accelerate demand growth further**

**PHOSPHATE DEMAND IS GROWING AT 2.3 % PA (2010~30)**



# Maaden Journey in Phosphate Development

## Resources development



- Utilize the KSA phosphate resources
- High quality: suitable for food and feed
- Sustained demand growth .

## Commissioning first Phosphate project



- \$5.6bn investment
- 3 m tonnes p.a. of DAP
- Commercial Production began Q1, 2012

## Developing Second Phosphate project



- Anchor megaproject for a major new strategic city
- 3M tons of DAP/NPK
- Downstream Products
- Leveraging rail and city partnerships.

# Phosphate As Main Elements In Fertilizers Industry And Downstream Products



## Industrial Products



- Detergents
- Paints
- Glasses
- Flame retardants

## Food-Grade products



- beverages
- Preservative
- Sugar refinery
- Bakeries

## Animal Feed



- Major components for vitamins and minerals needed by animals

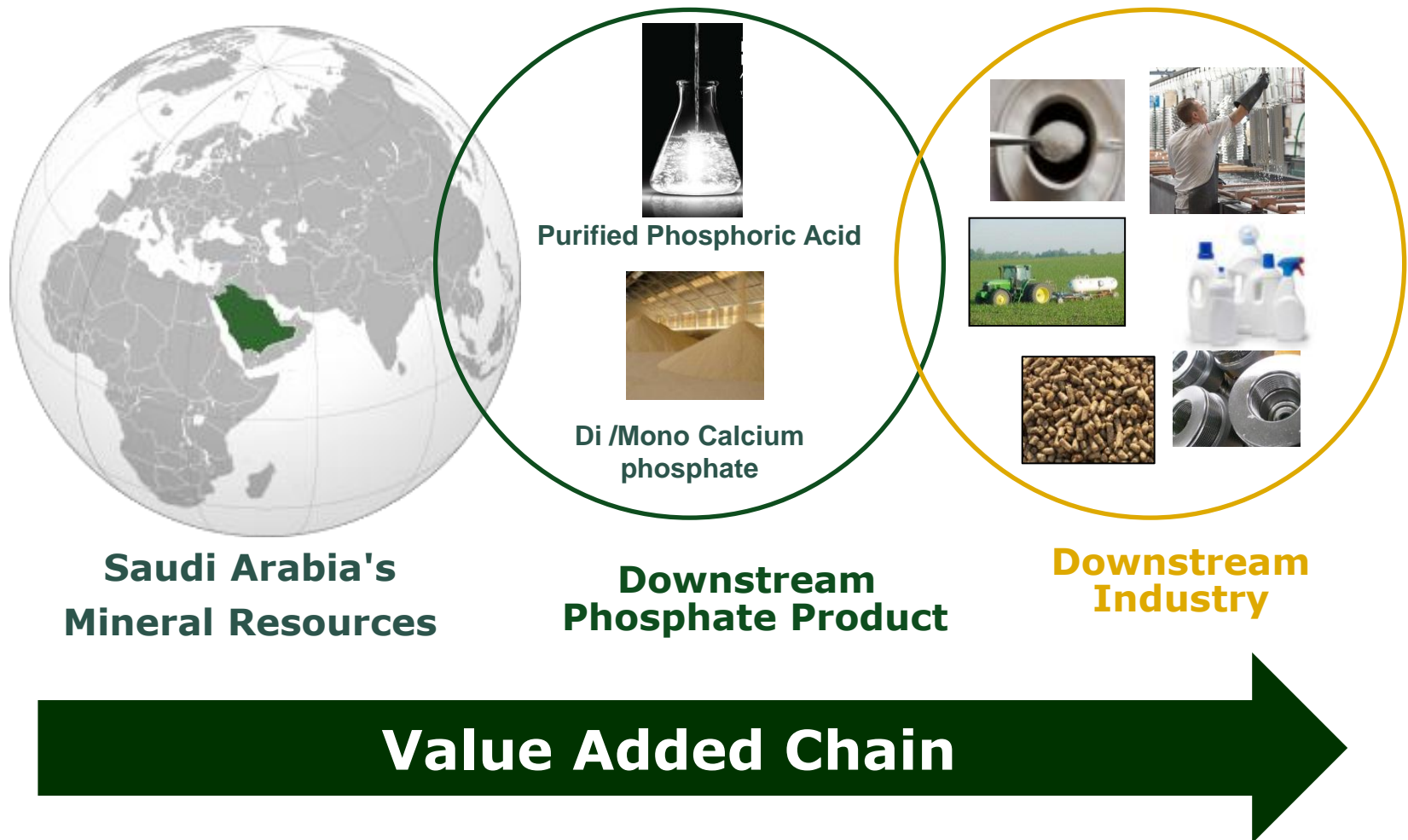
## Fertilizers



- Main elements in different type of fertilizers



# Resource to Downstream





# Phosphate Downstream Products

*Open Opportunities For Other Industries*

PPA

**Purified Phosphoric Acid**



## Technical Applications

Detergents

Catalysts

Speciality Fertilizers

Ceramics

## Food Applications

Additive for beverages

Cheese Production

Sugar Refining

Pet food

## Metal Treating Applications

Aluminium brightening

Coatings

# Phosphate Downstream Products

*Open Opportunities For Other Industries*

## DCP/MCP

**Di Calcium Phosphate and  
Mono Calcium Phosphate**

**Animal Feed : Source of Phosphorus (P) and Calcium (Ca) .**



# Thank You!

