

Note: Key data/information in this sample page is hidden, while in the report it is not.

2 Factors influencing China's glyphosate industry

Table 2-1 Factors influencing China's glyphosate industry, 2011

	Item	Analysis
Favorable factors		
	Labor cost	
Unfavorable factors		
		Backward.

Source: CCM International

4 Glyphosate supply

4.2.1 China's position in global glyphosate technical supply

Table 4.2.1-1 Key players of glyphosate technical in the world, 2008-2011

Glyphosate producer	Capacity '11, '000t/a	Output, '000 t			
		2008	2009	2010	2011
Chinese (about 10 producers)					
Others					
Total					

Source: CCM International

Table 4.2.1-2 Output of China's glyphosate and share in global market, 2007-2011

Year	Output of glyphosate tech., '000 t			China's PMIDA output, '000 t	China's total*, '000 t	China's share
	Global	China	China's share			
2007						
2008						
2009						
2010						
2011						

Note: * PMIDA (converted to glyphosate tech.) is included.

Source: CCM International

Figure 4.2.3-2 Capacity and output of glyphosate technical by producer in China, 2007-2011

No.	Abbreviation	Pathway 2011	Raw materials 2011	Capacity, t/a					Output, t				
				2007	2008	2009	2010	2011	2007	2008	2009	2010	2011
1.1													
1.2													
1.3	Sichuan Fuhua												
1.4		AEA											
1.5			DEA										
1.6													
1.7			Glycine, IDAN										
1.8	Biok Kaipu												
1.9													
1.10													
1.11													
1.12													
...													
...		IDA											
...													
...													
...													
	Total												

Note: Zhejiang Wynca has two production bases, Zhejiang Jinfanda has three production bases, and Shanghai CAC has two production bases.

Source: CCM International

4.2.5 Production by production route

Table 4.2.5-2 Output of glyphosate technical by production routes in China, 2002-2011

Year/pathway		2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
AEA	Output, t										
	Growth rate										
	Operating rate										
IDA	DEA route	Output, t									
		Growth rate									
		Operating rate									
	IDAN route	Output, t									
		Growth rate									
		Operating rate									
Total	Output, t										
	Growth rate										
	Operating rate										

Source: CCM International

5.1 Trade analysis

5.1.3 Export situation of PMIDA and glyphosate

Table 5.1.3-11 Main export destinations of glyphosate in 2011 (Quantity: tonne, Price: USD/kg, Value: USD)

No.	Country	41%IPA		62%IPA		75.7% WSG				Value
		Quantity	Price	Quantity	Price	Quantity	Price	Quantity	Price	
1					1.96					
2			1.64							
3										
4		1,161.405								
5								3,508.361		
6										
7										
8										
...	Republic									
...										
...								1,667.600		
...										
...							3.73			
...										
...	Cameroon									
...										
...										
	Others									
Total										

Source: CCM International

6 Demand for glyphosate

6.2.3.1 By specific formulation

Table 6.2.3.1-1 Consumption of main glyphosate formulations in China, 2004-2011, tonne

Main formulations	2004	2005	2006	2007	2008	2009	2010	2011	CAGR, 07~11
10%SL									
30%SL									
Others									
Total									

Source: CCM International

6.2.3.2 By crop

Table 6.2.3.2-2 Glyphosate consumption in main crops in China, 2007-2011, calculated by 100% technical, tonne

Crop	2007	2008	2009	2010	2011	CAGR, 07-11
Orchard						
xxxx						
xxxxxxx						
xxxx						
xxxx						
xxxxxxx						
xxxxxxx						
xxxxxx						
Tea						
Others						
Total						

Note: Others mainly include weeding for wasteland reclamation, non-agricultural use, etc.

Source: CCM International

7 Production technology & technology level

Table 7.1.1.3-1 Theoretical raw material cost of glyphosate production for AEA pathway in China, Feb. 2012

No.	Raw material	Unit consumption (t/t)	Price(USD/t)	Unit Cost(USD/t)
1	Glycine (Industrial grade)			
2				
3				
4				
5				
6				
	Total			

Source: CCM International

7.3 Cost analysis of glyphosate (five major glyphosate producers)

Table 7.3-1 Comparisons of glyphosate or PMIDA profit of five major glyphosate producers, Feb. 2012, USD/t

Item	Zhejiang Wynca	Nantong Jiangshan	Anhui Huaxing	Jiangsu Yangnon	Hubei Sanonda
1. Total income					
Price					
Other income					
2. Expenses					
Manufacturing cost					
Administrative expenses					
Total production cost					
Taxes					
3. Gross profit					
4. Profit tax					
5. Profit after tax					
6. Profit margin					

Source: CCM International