

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

1 Glyphosate supply

1.1 Glyphosate registration situation

As the world's most popular herbicide, glyphosate has been registered in China since the mid 1980s and now it is the herbicide with the most registration times in China. There are ■ active registrations of glyphosate by ■ companies as of March 14, 2012.

Table 1.1-1 Registrations of glyphosate by specifications in China, as of March 14, 2012

Specification		Number of registration
Single formulation	SL (396)	■
	SP (72)	
	SG/WSG (54)	
Mixed formulation		■
Technical		■
Total		■

Source: CCM International

1.2 Glyphosate technical

1.2.1 China's position in global glyphosate technical supply

China is playing a more and more important role in global glyphosate market, becoming the largest producer of glyphosate technical in the world with output (PMIDA is included) of over ■ tonnes in 2011, accounting for over ■% of global supply. Over ■% glyphosate technical producers are concentrated in China, with only several ones outside China. Over ■% of China's glyphosate output is exported to over ■ countries and regions worldwide.

Table 1.2.1-1 Key players of glyphosate technical in the world, 2008-2011

Glyphosate producer	Capacity '11, '000t/a	Production, '000 t			
		2008	2009	2010	2011
Chinese (about 50 producers)	■	■	■	■	■
Monsanto (the US, Brazil, Belgium, Malaysia, Argentina)	■	■	■	■	■
Atanor (Argentina)	■	■	■	■	■
Nortox (Brazil)	■	■	■	■	■
Cheminova (Denmark)	■	■	■	■	■
Albaugh (the US)	■	■	■	■	■
Excel Crop Care Ltd. (India)	■	■	■	■	■
Sabero Organics Gujarat Limited (India)	■	■	■	■	■
PT. Dalzon Chemicals (Indonesia)	■	■	■	■	■
Others	■	■	■	■	■
Total	■	■	■	■	■

Source: CCM International

2 Circulation

2.1 Trade analysis

2.1.1 Trade position in the world

China is a very important player in global glyphosate trade. As climbing energy costs keep pushing production costs to grow, the developed countries have chosen to import glyphosate from China, mainly attributed to low costs of labor and other resources in China. China therefore has become the biggest exporter of glyphosate in the world in recent years, with the export volume reaching ■ tonnes in 2011 (including PMIDA, glyphosate technical and formulations, converted to ■% technical), satisfying around ■% of the global demand.

The supply share of Chinese glyphosate in the world has been increasing in recent years, with the average supply growth rate staying at ■% in 2004–2011.

2.2 Price

2.2.1 Key factors

- Supply and demand

Supply and demand is the main factor influencing the price of Chinese glyphosate.

Since over ■% of Chinese glyphosate is exported to overseas market, overseas consumption and demand for glyphosate have been greatly influencing China's glyphosate industry, and the supply-demand status, which should be analyzed from a global perspective, determines the price trend of China's glyphosate industry.