

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

1 Overview of GMC industry

1.1 Global planting of GMC

Table 1.1-3 GMC in the world by trait, 2005-2014, million hectare

Trait	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Herbicide tolerance	■	■	■	■	■	■	■	■	■	■
Insect resistance	■	■	■	■	■	■	■	■	■	■
Stacked traits	■	■	■	■	■	■	■	■	■	■
Total	90.0	■	■	■	■	■	■	■	■	■

Source: International Service for the Acquisition of Agri-biotech Applications

1.2 Key biotech players (Monsanto, Syngenta)

- Operating situation

Table 1.2-3 Major operation situation of Syngenta AG, 2010-2014, million USD

Item		2010	2011	2012	2013	2014	CAGR
Net sales	Seeds	■	■	■	■	■	■
	Crop protection	8,878	■	■	■	■	■
	Inter-segment elimination	■	■	■	■	■	■
	Lawn and garden	■	■	■	■	■	■
	Total	■	■	■	■	■	■
Net sales share	Seeds	■	■	■	■	■	■
	Crop protection	■	■	■	■	■	■
	Inter-segment elimination	■	■	■	■	■	■
	Lawn and garden	■	■	■	■	■	■
Gross profit	Total	■	■	■	■	■	■
Gross profit margin	Total	■	■	■	■	■	■

Note: Net sales in seeds and crop protection segments (lawn and garden is excluding 2012-2014 and including 2010-2011)

Source: 2010-2014 Syngenta AG Annual Review

2 Global supply & demand of key herbicides applying on GMC field (2013-H1 2015)

2.1 Supply situation

2.1.1 Characteristics comparison of key herbicides

Table 2.1.1-1 Characteristics comparison of key herbicides

Target product	Mechanism of action	Effectiveness	Risk protection	Side effect
Glyphosate	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Glufosinate-ammonium	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Dicamba	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
2,4-D	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Source: CCM

2.1.2 Key herbicides global production

2.1.2.1 Glyphosate

Table 2.1.2.1-1 Glyphosate technical producers in the world, 2013-H1 2015

No.	Company	Capacity, t/a			Output, tonne		
		2013	2014	H1 2015	2013	2014	H1 2015
1	Chinese producers (about 50)	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
2	Monsanto (The US, Brazil and Argentina)	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
3	Atanor (Argentina)	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
4	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
5	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
6	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
7	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
8	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
9	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
10	Others	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Total		[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Source: CCM

Table 2.1.2.1-2 Glyphosate technical producers in China, 2013-H1 2015

No.	Company	Abbreviation	Capacity, t/a			Output, tonne		
			2013	2014	H1 2015	2013	2014	H1 2015
1								
2	Zhejiang Wynca Chemical Group Co., Ltd.	Zhejiang Wynca						
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
Total								

Note: The capacity of Zhejiang Wynca Chemical Group Co., Ltd. in 2014 was from Jiande Chemical No. 2 Plant, one of its glyphosate production plants.

Source: CCM

2.2 Global consumption situation

2.2.2 By key countries (the US, Brazil, Argentina)

2.2.2.1 The US

Table 2.2.2.1-1 Agricultural use of glyphosate (95% technical equivalent) in the US, 2013-H1 2015, tonne

Year	Total	GMC	Traditional crops
2013			
2014			
H1 2015			

Source: CCM