

# Supply and Demand of Glyphosate in China

The Second Edition  
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## 1. Introduction

As the main driver for the global glyphosate consumption in the world, the planting area of GM crops has expanded rapidly to 181.5 million hectares in 2014 at a CAGR of about 6.8% in 2006–2014, but it firstly decreased to 179.7 million hectares in 2015 due to a low price, resulting in that some farmers stopped planting corn, cotton and rapeseed, but turned to more easily managed crops such as soybean, and also other less demanding crops like beans, sunflower, and sorghum. The planting area of GM crops increased to 189.8 million hectares in 2017, a 2.5% increase equivalent to 4.7 million hectares compared to that in 2016.

Thanks to the increase of GM crops, more glyphosate is needed in the world currently. China, as a large supplier of glyphosate in the world, has produced more glyphosate these years. The output of glyphosate technical in China increased with a year-on-year growth rate of 15.38% in 2016. And the output of glyphosate technical in China in 2017 remained the same as that in 2016.

China's glyphosate will play an increasingly important role in the global glyphosate market. The output of glyphosate technical in China is estimated to increase with a CAGR of 2.5% between 2018 and 2022. Then what will be the driving factors or barriers for glyphosate market development in China? CCM will introduce the overall glyphosate market in China to you from the following points,

- Production of glyphosate technical in China, 2014–H1 2018
- Key manufacturer of glyphosate technical in China, 2013–H1 2018
- Market demand for glyphosate technical in China at home and abroad, 2013–2017
- Forecast on supply and demand of glyphosate technical in China, 2018–2022

## **2. Approach for the report**

The research for the report is carried out by the following steps:

### **Desk research**

Through desk research, basic information, such as glyphosate registration, supply, supplier, import & export, GM crop planting and agricultural situation in major countries, is collected, mainly from the internet, magazines, periodicals and third parties.

### **Telephone interview**

Extensive telephone interviews are carried out in China, through which, CCM gets some key information, including glyphosate use in major crops (number of applications, usage, rate of application, etc.), development of glyphosate-resistant weeds, glyphosate demand in China, major glyphosate suppliers and their market shares, etc. Such information helps CCM figure out the supply and demand situation of glyphosate in China.

The interview and questionnaire survey have covered:

- Key suppliers
- Key researchers
- Key traders and associations

### **Report generation**

Logical analysis and scientific ratiocination have been conducted to generate the report, such as supply and demand analysis (bottom-up and top-down approach) and cross-checking of all the data. All the data and findings obtained through the above methods will be presented in the report clearly.

### 3. Executive summary

As of H1 2018, the capacity of glyphosate technical in China further decreased on top of a decline in xxx. By contrast, the output of glyphosate technical increased to xxx tonnes in 2016 thanks to the increasing demand for glyphosate from downstream market at home and abroad, with a year-on-year growth rate of xxx %. And the output of glyphosate technical in China kept stable at xxx tonnes in xxx.

The number of glyphosate technical suppliers (idle included) xxx xxx from xxx in 2006 to xxx in 2010, but it decreases sharply to xxx in 2012, xxx in 2015, xxx in 2016 and xxx in 2017 caused by the sluggish market, low price, poor profit, unfavorable policies (high requirement for waste treatment, cancellation of VAT, EPV), etc.

In China, glyphosate is widely used to weed for orchard, wasteland reclamation and traditional crops before seeding for its broad weed spectrum and high efficiency. Mainly applied in upland crops, glyphosate sees small application in rice fields. Crop planting area in China has increased stably these years, at a CAGR of xxx % in 2012–2016. The main crops include corn, rice, wheat, beans and cotton, whose total planting area accounted for about xxx % of the national total in 2016. Though China's planting area of GM crops ranks sixth in the world, BT cotton is only commercially planted here. And only a small share of glyphosate is consumed domestically every year, and it was about xxx % of the output in 2015–2017.

#### 4. What's in this report?

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

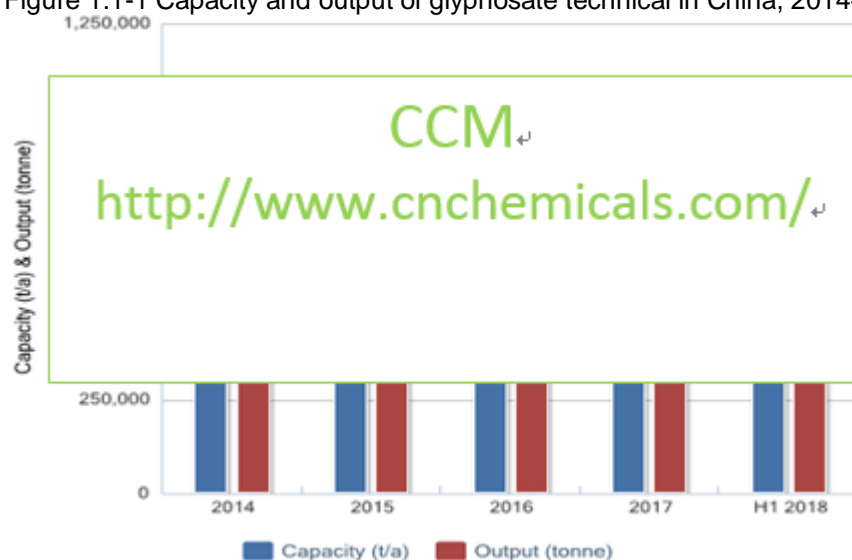
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### 1 Supply of glyphosate in China, 2014–H1 2018

#### 1.1 Capacity and output of glyphosate in China

The capacity of glyphosate technical in China saw xxx in xxx, which further decreased as of H1 2018. By contrast, the output of glyphosate technical xxx to xxx tonnes in 2016 thanks to the increasing demand for glyphosate from downstream market at home and abroad, with growth rate of xxx % compared with that in 2015. And the output of glyphosate technical in China kept stable at xxx tonnes in xxx.

Figure 1.1-1 Capacity and output of glyphosate technical in China, 2014–H1 2018



Source: CCM

#### 1.2 Major producers of glyphosate in China

The number of glyphosate technical suppliers (idle included) kept increasing from xxx in 2006 to xxx in 2010, but it xxx to xxx in 2012, xxx in 2015, xxx in 2016 and xxx in 2017 caused by the xxx etc.

...

Table 1.2-1 Basic info of glyphosate technical manufacturers in China

No.	Company	Abbreviation	Location	Launch time	Status, H1 2018
1	xxx	xxx	xxx	xxx	xxx
2	xxx	xxx	xxx	xxx	xxx
	xxx	xxx	xxx	xxx	xxx
3	xxx	xxx	xxx	xxx	xxx
	xxx	xxx	xxx	xxx	xxx
...	...	...	...	...	...

Source: CCM

Table 1.2-2 Capacity and output of glyphosate technical by producer in China, 2013–H1 2018

No.	Company	Capacity, as of H1 2018, t/a	Output, tonne					
			2013	2014	2015	2016	2017	H1 2018
1	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
2	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
3	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
	xxx	xxx	xxx	xxx	xxx	xxx	xxx	xxx
...	...	...	...	...	...	...	...	...
<b>Total</b>		<b>xxx</b>	<b>xxx</b>	<b>xxx</b>	<b>xxx</b>	<b>xxx</b>	<b>xxx</b>	<b>xxx</b>

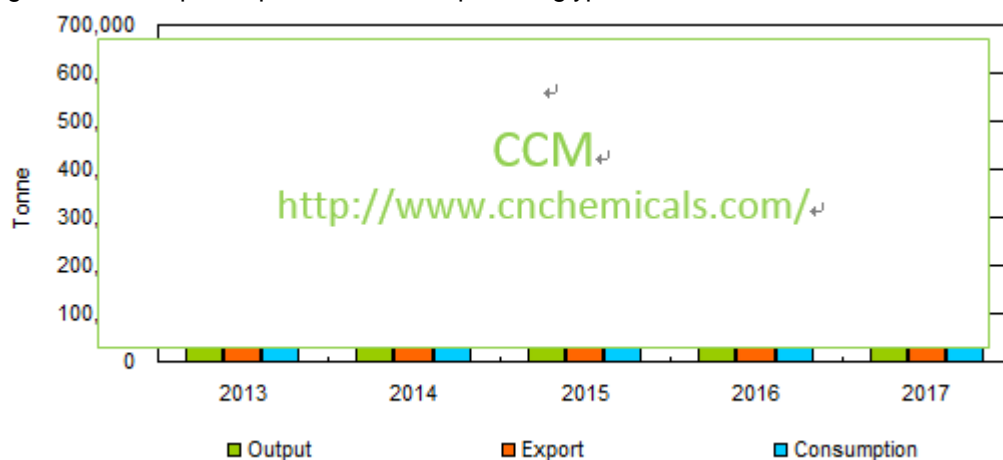
Source: CCM

## 2 Demand for glyphosate in China, 2013–2017

### 2.1 Domestic demand for glyphosate in China

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Figure 2.1-1 Output, export and consumption of glyphosate in China, 2013–2017



Note: The volume has been converted to 95% technical.

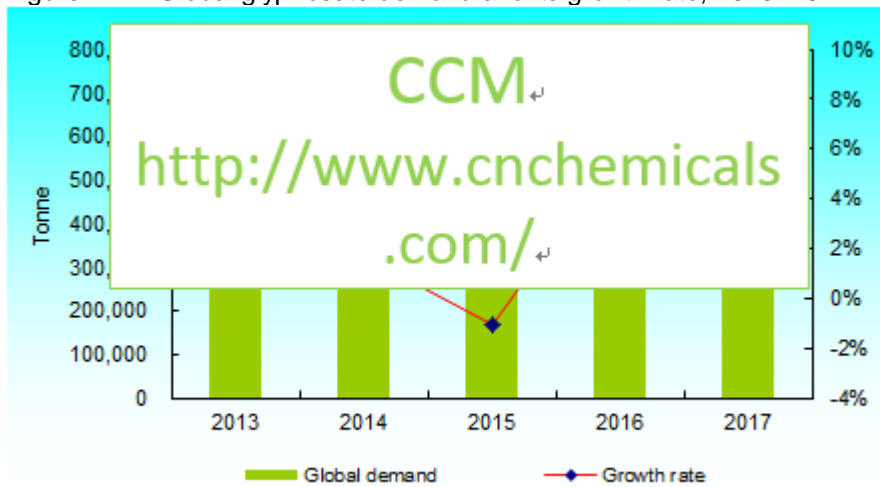
Source: China Customs & CCM



## 2.2 Global demand for glyphosate in China

...

Figure 2.2-1 Global glyphosate demand and its growth rate, 2013–2017



Note: 95% technical equivalent

Source: CCM

The global glyphosate demand xxx in 2012–2014, mainly attributing to the following reasons:

- **Development of GM crops.** ...
- **Development of non-tillage or minimum-tillage system.** ...
- **Development of bio-energy.** ...

- ...  
...

Global demand for glyphosate xxx in 2015, mainly caused by...

Global demand for glyphosate xxx in 2016 and 2017 ...

Glyphosate is mainly consumed in ...



Figure 2.2-2 Global consumption of glyphosate by continent, 2017



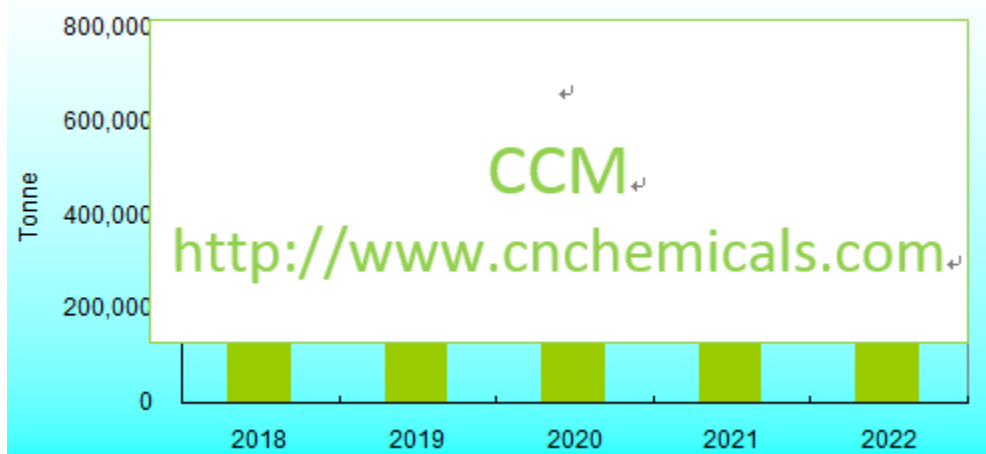
Source: CCM

### 3 Outlook for supply and demand of China's glyphosate

#### 3.1 Forecast on glyphosate supply, 2018–2022

...

Figure 3.1-1 Forecast on glyphosate technical output in China, 2018–2022



Source: CCM

#### 3.2 Forecast on glyphosate demand, 2018–2022

##### Main factors influencing glyphosate demand in China

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