



# Glyphosate China Monthly Report

FLYER



# Glyphosate China Monthly Report

Exclusive stories monthly

## Who need it?

### ➤ Import/export companies

Targeting China and global glyphosate industry, paying close attention to the supply and price fluctuation of glyphosate/PMIDA and its upstream raw materials and intermediates and looking for supply partners in China and the world.

### ➤ Glyphosate manufacturers

Intending to know the competitors' latest actions in China's glyphosate market, and looking for partners

### ➤ Research institutes

Desiring to know the latest glyphosate technologies and to transfer advanced glyphosate technologies to China

### ➤ Analysts and consultants

Trying to gain insight into the market trend for glyphosate industry and its related industry

### ➤ Venture capital investor

Seeking for chance to cooperate with Chinese company to deal with business of glyphosate industry

## What you have?

- PDF newsletter of over 10 stories delivered monthly
- Guaranteed in-depth news
- Access to online archive of all previous issues with downloads
- Professional solution to query related to glyphosate

**C**hina is currently the largest glyphosate supplier in the world, with low production cost and good chemical production foundation. The dynamics of China's glyphosate greatly impacts the global supply structure. Over 80% of glyphosate produced in China is exported, to more than 20 destinations in the world.

China has witnessed fast glyphosate technical capacity expansion, with CAGR of 27.8% during 2003~2008, and it is still expanding. Output has also been growing fast, with similar speed.

The growth in output and capacity is mainly driven by growing overseas demand with the expanding GM crop planting area.

The two glyphosate production routes, namely AEA route and IDA (including IDAN and DEA) route, adopted by Chinese producers, are undergoing structural changes, with IDA route's share expanding, because of changes in raw material supply.

The raw material supply shortage faced by producers adopting DEA and IDAN pathways before 2008 has been gradually relieved, as driven by the soaring price of glycine, IDAN and DEA during and before 2008, many raw material producers have been expanding their capacity.

Despite the largest output and capacity, China's glyphosate industry has many shortcomings, including overcapacity, dispersed production, few overseas registrations, poor environmental protection awareness, lack of governmental supervision, inefficient production technology, etc.

Changes in China's glyphosate industry have not only been considerable, but also frequent, puzzling both outsiders and industry insiders, not knowing where it is to go next. That's because the factors influencing it are many and changing frequently, thus making it highly necessary for timely update and close follow-up of the dynamics in this industry.

The following will be some of CCM's focuses.

### ➤ Price fluctuations and impacts

The great fluctuations in 2008 have largely affected newly launched production lines and those under construction. What's the future price trend and how domestic manufactures cope with challenge of gloomy price.

### ➤ Raw material dynamics and impacts

➤ **Market trends and factors behind**  
China's glyphosate industry will keep gloomy in next few years under current overcapacity and economic recession, and uncompetitive companies may suffer loss and quit production.

### ➤ Global demand dynamics and impacts

How global macro economics, overseas policy and GM crops planting situation affect glyphosate demand? What's the flow of China's glyphosate?

### ➤ China's position in the global supply chain and influencing factors

### ➤ Activities in exploiting overseas market

How Chinese producers explore overseas market; latest progress in establishing close cooperation with foreign players; and impacts on producers and whole industry.

### ➤ Chinese market

How and why does it differ from overseas market (e.g. Glyphosate 10%SL is only produced and consumed in China. It has been banned recently, what are the impacts?); what are the future trends and factors behind them, such as promotion of non-tillage technology, governmental policies, etc.

## Glyphosate China Monthly Report

brings you the **latest information** and **in-depth analysis** on market trends, supply and procurement opportunities in raw materials and intermediates, technology process, price updates, new policies and company dynamic, etc.

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## Main Content

### Required Column

#### ■ Company dynamics

Report the latest news about companies in China, such as new launch, company expansion, merger & acquisition, cooperation, etc.

Find out stories behind the news, including company development strategy, related policy, global market situation, etc. Figure out how the companies explore the global glyphosate market, where and when.

#### ■ Price Update

List the updated price of glyphosate, PMIDA, key raw materials and key formulations in the domestic market and for export.

As for significant price fluctuation, CCM will make in-depth analysis and show the key factors leading to the fluctuation.

#### ■ Supply & demand

Cover the latest information about glyphosate supply and demand in China and in the world.

Analyze the factors influencing glyphosate supply and demand, including global macro economic situation and key policies related to glyphosate import/export in overseas countries, raw material supply situation, exporter behaviors, Chinese policy, etc.

Exclusively analyze supply & demand trend in China and world.

#### ■ Global market dynamics

Focus on dynamics of global glyphosate market, covering demand, production, supply, trade, flow, etc.

Report and analyze the latest events regarding global supplier dynamics, flow dynamics, price fluctuations, raw material supply, policies on glyphosate industry in countries and regions with large production/consumption, planting of GM crops, etc.

#### ■ Import/ Export analysis

Trace the circulation of China's glyphosate and PMIDA globally.

Monitor the price, volume and destinations of glyphosate/PMIDA export, and analyze the behind reasons.

#### ■ Raw material market

Report the latest news on the demand and supply of glyphosate key raw materials, intermediates and additives in China, covering the notable events in upstream industries which may affect Chinese and global raw material supply.

Analyze the influencing factors, including price, supply, demand, production process and production cost. CCM will further analyze how the factors influence China's glyphosate and figure out the development trends in the coming future.

### Optional Column

#### ■ Policy & Legislation

Report and analyze the latest policies and legislations issued in China and abroad related to glyphosate and the relevant industry, such as export rebate rate, overseas anti-dumping rate, effluent pollutant discharging standard, GM crop planting, registration administration, etc.

#### ■ Technology improvement & demand

Report the technology improvement of glyphosate and its related products.

Analyze influences of technology improvements to China's glyphosate industry, including cost reduction, quality improvement and efficiency increase.

#### ■ Competitive analysis

Compare different glyphosate/PMIDA producers in terms of their production technologies, raw material supply, etc. and make in-depth analysis on their advantages and disadvantages, thus judging their competitiveness in the industry.

#### ■ Registration dynamics

Report the important registration dynamics of glyphosate in both China and abroad.

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## Approaches

Professional researchers in CCM will employ the following methods to obtain the information needed.

### ◆ Telephone interview

CCM arranges phone interview with glyphosate/PMIDA producers, governments, pesticide associations, exporters, raw material and intermediate suppliers, peasants, etc. to gain first-hand information about China's glyphosate industry.

### ◆ Face-to-face interview

CCM carries out face-to-face interviews with glyphosate producers, experts, experienced salesman, exporters and peasants, to obtain in-depth analysis & comment on related issues.

### ◆ Experts consultancy

CCM has established long-term relationship with many experts from the glyphosate industry and can obtain information from them via payment or information exchange. They also contribute stories or comments to CCM termly.

### ◆ Database searching

CCM has established the price monitoring database for glyphosate and its related products, which will benefit CCM's data cross-check and in-depth research on China's glyphosate industry.

CCM may also get authoritative data from Crop Protection Association, China Customs, etc.

### ◆ In-depth investigation

CCM conducts in-depth investigations on those herbicide companies with great influence on China's herbicide market or the global market.

### ◆ Exhibition attendance

CCM attends influential exhibitions to obtain the latest information on new technologies, glyphosate producers and exporters. CCM establish database for these exhibitors and keep in touch with them termly.

### ◆ Professional data processing and forecasting

Team members in CCM are professionals in processing information concerning with crop protection, herbicide, econometrics, international trade, polymer chemistry, renewable energies and biochemistry ecology etc.

Professional software for data processing and forecasting, including SPSS/SAS, Eviews, are applied to facilitate our work. Specialized backgrounds will ensure our work well done.

### ◆ Other methods helpful to our work

Any method feasible and helpful to our work will be adopted. For instance, internet searching is an important way for information retrieval. We may register to be the member of an authoritative website and obtain information from it.

**CCM International Limited** is an independent consulting company focused on China's chemicals market. CCM's expertise lies in market researches, news, conferences and databases, in such industries as insecticide, crop protection, herbicide, fungicide, insecticide, pigment, coating, food ingredient, renewable energies, fine chemicals, bio-technology, etc. CCM has established a good reputation as one of the key knowledge providers in these industry sectors.

CCM has experienced in the research of China's crop protection market for over 6 years and has finished many updated reports related to crop protection. Now CCM has run a database of price and import/export monitoring of China's glyphosate and its key raw materials since 2005. All of these support research and update will benefit the high achievement of this newsletter: Glyphosate China Monthly Report.

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