

Glyphosate China Monthly Report 2010 (12 issues per year)

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Abstracts

Glyphosate China Monthly Report provides you with real-time intelligence on China's glyphosate market.

It is a monthly published newsletter, which can be downloaded in PDF format. The subscription period is yearly, grants the subscriber 12 issues in total.

China is the world's largest producer of glyphosate, with 80% of the glyphosate produced in China being exported. Glyphosate is also still by far the most popular herbicide among Chinese farmers.

However, the industry is facing a number of serious long-term challenges. Increasing crop resistance threatens to make glyphosate less attractive to farmers, while research linking the product to cancer could lead to several key export markets banning the product altogether. Meanwhile, Chinese producers are struggling to comply with tough new environmental regulations and cope with severe industry overcapacity.

Glyphosate China Monthly Report will help you stay ahead of the game in this fast-changing market with real-time reporting on the entire glyphosate industry chain, from raw materials to end consumption. This includes:

Breaking news from China and abroad

The latest market data, including price information for glycine, PMIDA, IDAN, paraformaldehyde, yellow phosphorus, and other raw materials and intermediates, import/export data, production, consumption, operating rates, etc.

In-depth analysis of market trends, Chinese government policy, the performance of leading Chinese producers, M&A, new technologies, threats from possible substitutes, and more

Expert commentary from industry insiders, including regular guest articles and interviews with insiders at leading Chinese manufacturers, associations and government organizations

HEADLINE

On 9 Oct., 10 domestic enterprises were approved as pesticide registration testing units, which are effective for five years. The innovation research institute of leading glyphosate TC producer Zhejiang Wynca is also on the list, being allowed to conduct product chemical tests, including physical & chemical property determination tests, product quality inspection tests or storage stability tests.

This month, Xingfa Group announced its key operating data for Q1-Q3 – glyphosate TC outputs were 113,000 tonnes (down 14.85% YoY) and glyphosate TC sales 125,100 tonnes (up 7.84% from 2019's 116,000 tonnes). This highlights Xingfa Group's outstanding edge in raw material costs across the sector. Moreover, the sales rates of its yellow phosphorus rose from 13.90% to 24.91% during the period.

China's glyphosate TC market will usher an export season this month. Currently, more overseas inquiries were seen over the past 2 months, with increased close rates. Many domestic key producers increased their operating rates before the National Day to complete previous foreign orders and stock up for the peak season. Glyphosate TC price is expected to further go up due to higher prices of major raw materials and the continuous suspension of Leshan Fuhua and Hebang Bio-technology.

In the first half of Oct., the average operating rate of China's key glyphosate TC producers rose to 60%. Leshan Fuhua and Hebang Bio-technology resumed production in early Oct., and Guangxin Agrochemical began to take orders. The average operating rate is expected to go up in Oct.-Nov. It's noted that most processors had strong wait-and-see attitudes at this point.

In mid-Oct., the average ex-works price of yellow phosphorus rose, mostly owing to tight market supply and increased production costs of producers. As of 19 Oct., the country witnessed stable yellow phosphorus production and full booked orders, with producers

reluctant to sell. Many suppliers believed that the price will further grow in the short term.

On 27 Oct., Henan Hansi's glufosinate-ammonium-glyphosate SL and Zhejiang Jinfanda's 2,4-D-glyphosate SL were allowed to be registered. During 26 Sept. and 25 Oct., registrations of 10 glyphosate-related products were successfully renewed.

In late Sept., Zhejiang Province's Development and Reform Commission issued the Work Plan for the Yangtze River Economic Zone, planning to close and relocate some chemical enterprises in urban built-up areas, densely populated urban areas, various protected areas, and other environmentally sensitive regions by 2020.

On 13 Oct., China's MIIT publicised the Catalogue for Guiding Industrial Development 2018. It underlines that Guizhou Province will prioritise the development of its phosphorus chemical industry, while many regions will focus on the pesticide industry (mostly including green pesticides, new pesticide varieties, and pesticide formulations).

According to the list 'Top 30 Chinese Pesticide Exporters in 2019' published by the CCPIA on 11 Oct., 10 companies (out of the top 15) such as Leshan Fuhua, Weifang Rainbow, Nantong Jiangshan, Zhejiang Wynca, Yangnong Chemical took part in glyphosate export last year.

This article provides the ex-works prices of glyphosate products and related intermediates and raw materials in the first half of Oct. 2020. The products involve glyphosate TC, glyphosate 41% IPA, glyphosate 50% SP, glyphosate 62% IPA, glyphosate 75.7% WSG, glycine, IDAN, DEA, PMIDA, yellow phosphorus, phosphorus trichloride and isopropylamine.

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