

IDAN Survey in China 2022

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Abstracts

Iminodiacetonitrile (IDAN), an important fine chemical intermediate, takes an important role in the production of PMIDA & glyphosate. This report has carried on the analysis of IDAN from its production to its consumption in China, including production technology, production, producers, consumption, and price change of IDAN, as well as influencing factor analysis for IDAN industry. So, this report can be a guide for the players who pay close attention to IDAN industry.

China started commercial production of IDAN in 2005. At that time, the output was only several hundred tonnes because of limited market size. Since 2006, IDAN has been gradually known by more and more domestic glyphosate technical producers. They made attempts to use it as raw material, and the experiment has made progress. Since then, the domestic IDAN industry has been growing rapidly. In 2013–2014, the national output of IDAN has kept increasing because of the increasing output of PMIDA & glyphosate technical (made via the IDAN route) during the same period. But in the following years, it decreased.

In China, the output of IDAN is mainly affected by environmental policy and glyphosate market. Environmental policy is expected to be more stringent in the future, which will lead to rising raw materials cost from upstream and lower operating rates in manufacturers, downstream manufacturers also want to purchase PMIDA instead of IDAN to reduce their production waste and environmental protection pressure. In the short term, the oversupply of another route for the production of glyphosate—the glycine route leads to a lower price of glycine, which causes glyphosate producers to choose the glycine route. In the long term, demand for glyphosate is expected to remain at a high level for the lack of good substitutes and the bright future of GM crops. It is estimated that the output of IDAN will decline slightly in 2023 and a small increase is expected between 2024 and 2027.

Scope of the report

Region scope: China

Time scope: primarily 2013 to 2022

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