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World Trade and Price of Chlorpyrifos

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Abstracts

Glyphosate, a broad-spectrum non-selective herbicide widely used to kill unwanted plants both in agricultural and in nonagricultural landscapes, has been in a leading position in the world's herbicides in the past few years. It is estimated that the global consumption of glyphosate in 2011 is about 650,000 tonnes (converted to glyphosate technical 95%) and will increase with a CAGR of over 3.10% during 2012-2016.

Though the global glyphosate industry has witnessed low price, poor profit (mainly technical), oversupply, etc. since the end of 2008, China remains the top production country of glyphosate in the world with glyphosate technical capacity of over 700,000t/a in 2011, but a certain number of domestic glyphosate production units kept idle all the year around. With strong competitiveness in technical and low-level formulation production, China will play a more and more important role in global glyphosate industry in the coming few years.

Three production routes for glyphosate technical namely glycine route, IDAN route and DEA route coexist in China. In recent few years, the domestic PMIDA & glyphosate technical production has made marked progress, consisting in rising yield, mature by-product recovery technology, continuous R&D and application of waste water treatment technology (mainly membrane separation technology), etc.; in addition, the supply and the price of the key raw materials including DEA, glycine, IDAN, etc. have changed much since 2008, thus the competition among the three routes is becoming fierce and will be more fierce in the future. You can find the above mentioned details in this report.

Owning to its excellent efficiency in weed control, glyphosate is also the most widely used herbicide in China. China is a large agricultural country, with cultivated land area of 120 million ha., over 70 million ha. of which employ herbicides for weed control, and its glyphosate consumption volume is over 30,000 tonnes (converted to glyphosate technical 95%) annually. The ban of glyphosate 10%SL results in a reshuffle of the

domestic glyphosate market. What is the future trend of glyphosate by specifications, can 30%SL (mainly 41%IPA) play a dominant role, can other specifications like 62%IPA, 68%(W)SG, 50%SP seize more market shares? What is the regional distribution of glyphosate use and what is the use of glyphosate by crops? This report will reveal the market situation of glyphosate in China.

This report, based on CCM International's 10-year research experiences in Chinese glyphosate industry and its upstream sectors, dives deep into China's glyphosate industry to figure out the industry's key influencing factors, latest dynamics and future trends, in terms of production, technology, price, export, consumption/demand, key players' competitiveness and production cost, international collaboration, etc. From a global perspective, this seventh edition Glyphosate China Report will provide you with CCM International's primary intelligence and insight.

This report includes the following as part of its market coverage:

Supply, 2004-2011 (key producers, capacity and output by routes and geographical distribution, etc.)

Price change and influencing factors

Export situation by specifications, destination countries/regions, traders, etc., 2008-2011

Estimated cost of glyphosate by three routes and five key producers

Technology innovation

Current market size and forecast for glyphosate

Regional breakdown, 2011 - province-level statistics

End use breakdown, 2007-2011

Specification breakdown, 2004-2011

Key drivers and restrains

Profiles of some key companies (Zhejiang Wynca, Zhejiang Jinfanda, Nantong

Jiangshan, Jiangsu Weien, Sichuan Fuhua, Jiangsu Yangnong, Shandong Rainbow, Anhui Huaxing, Biok Kaipu, Hubei Sanonda, Zhejiang Jingma)

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