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# Glyphosate Industry Overview in China, 2011-2020

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## Abstracts

Description

Glyphosate are the most widely-used herbicides in the globe at present. The global demand for glyphosate increases continuously with that of biologic energies and large planting areas of transgenic Roundup Ready in South and North America. Globally, 60% of the transgenic crops are Roundup Ready. In the long term, the transgenic crops still possess large development rooms. Additionally, the breeds of crops resistant to Roundup will be increased. CRI forecasts that the global market size of glyphosate will keep expanding.

Monsanto Co. in the U.S.A. and some manufacturers in China are major monopolies in the global glyphosate market. CRI estimates that the glyphosate active ingredients and preparation manufactured by Chinese enterprises account for over 60% of the global market. It is mainly because the regulation and laws on environment protection in China are not that restrict like that in developed countries even some developing ones. Chinese glyphosate industry still possesses advantages of low environment cost so the export is profitable. The proportion of Chinese glyphosate APIs production in the globe is increasing. The production capacity of glyphosate and preparation increased from 2011 to 2015, and reached about 900 thousand tons in total by the first half year of 2016 with a global proportion of over 70%.

Presently, the glycine method dominates production processes of glyphosate with a proportion of about 70% by output volume. However, its faults are obvious such as serious impurity, by-products and pollution. IDA is only applied in minority enterprises due to restrictions on technologies and raw materials. However, the production capacity against restrict environment protection requirements will be eliminated gradually with the breakthrough of technologies. Therefore, the IDA method will be promoted to be mainstream with increasing output volume proportion of glyphosate. CRI estimates that the output volume of glyphosate exceeds 500 thousand tons in 2015, of which more than 80% are for export.

With the promotion in recent years, the planting area of transgenic crops increased from 1.7 million hectares in 1996 to 180 million hectares in the globe, and that reached 3.7 million hectares in China up to the end of 2015, ranking the sixth. In terms of types, major transgenic crops are cotton for the prohibited commercial planting of transgenic corns and soybeans in China.

Most manufacturers blindly expand the production capacity for profits created by glyphosate, which leads to the supply exceeding demand in the market. Therefore, prices of the glyphosate APIs and preparation experienced a significant decline in 2015. Meanwhile, certain small enterprises were confronted with shutdown or failure with declining output volume under environment protection pressures.

Chinese government declared to stop domestic sales and use of the Paraguat from Jul.1, 2016. The Paraguat is extremely poisonous to people without specific antidotes. It is presently prohibited or restricted in more than 20 countries with a mortality rate of over 90% after ingestion. As one of the major herbicides, Paraguat will certainly stimulate the demand of Chinese enterprises for glyphosate after its prohibition.

Chinese transgenic crops possess huge growth potential in terms of planting amount and structure compared to that of the globe. Generally, the planting of transgenic crops are supported by Chinese government with policies. Transgenic crops with security certificates include cotton, paddy, corn and papaya. Meanwhile, cotton and papaya are approved for commercial planting. Huge domestic demand for glyphosate will be created by the commercial planting of paddy and corn in the future. Although glyphosate were confronted with a series of international trade barriers like anti-dumping before, it is estimated to be exported by large annual volume with the cost advantages.

The glyphosate industry is expected to possess huge development space in the next few years with positive domestic and foreign prospect.

Through this report, the readers can acquire the following information:

- Definition and Classification of Glyphosate
- Research Methods of the Report

Production and Demand Status of Glyphosate in China

Analysis on Export of Glyphosate in China

Analysis on Top 5 Glyphosate Manufacturers in China

Development Opportunities and Driving Forces Faced by Glyphosate Industry in China

Risks and Challenges in Development of Glyphosate Industry in China

Analysis on Prices of Major Raw Materials of Glyphosate

Analysis on Glyphosate Prices in China

Forecast on Development of Glyphosate Industry in China

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