

Research Report on Global and China Glyphosate Industry, 2013-2017

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Abstracts

Glyphosate is a kind of herbicide with low toxicity, high efficiency and broad spectrum. It has been widely used for over two decades. In recent years, due to the wide spread of transgenic crops in the world, market demand for glyphosate booms and it constantly replaces other herbicides, ranking the first in global insecticide sales for many years.

During 2007 to 2008, influenced by many factors, glyphosate's market price increased to 100,000 CNY/ton. As a result, many small and medium-size enterprises engaged in producing glyphosate and the production capacity was concentrated and released. Later, the price suddenly declined and many small and medium-size enterprises exited the market. However, since 2011, glyphosate market price has boomed again due to the decreasing inventory. Encouraged by large profit, many small and medium-size enterprises plan to produce glyphosate again.

China has become the largest glyphosate producer in the world with glyphosate production capacity exceeding 600,000 tons by the end of 2012. China's glyphosate output volume declined in 2011 with only 92,000 tons output volume. However, the production concentration degree was improved and the output volume of the top 5 glyphosate enterprises reached 249,500 tons, accounting for 85% of the national output volume. In 2012, China's glyphosate output volume rapidly reached around 400,000 tons and glyphosate price increased rapidly in China market. From the second quarter of 2012, glyphosate started to show an upward trend. From the third quarter, glyphosate began to show a scalar-form rapid upward trend with a quarterly growth rate of over 30%. At the beginning of the fourth quarter, the increasing glyphosate industry entered an adjustment period and the growth rate slowed down. In the first half year of 2013, glyphosate price ranges from 33,000 CNY/ton to 38,000 CNY/ton in China market.

China glyphosate industry showed price boom in the first quarter and the second quarter of 2012. The major reasons are that: industry integration and environment protection pressure, waste disposal costs and the expanding transgenic crops. The insufficient glyphosate storage in 2011 led to the shortage in 2012.

Meanwhile, China's environment protection requirements are increasingly strict. On May 27, 2013, China's Ministry of Environmental Protection announced that environment protection inspection would be conducted on glyphosate/pmda manufacturing enterprises and the overall inspection on the whole industry shall be completed by the end of 2015. Enterprises can voluntarily apply for environment protection inspection and submit applications to Province Ministry of Environmental Protection before August 2013, March 2014 and March 2015. After the primary inspection of Province Ministry of Environmental Protection and the re-inspection of China's Ministry of Environmental Protection, China's Ministry of Environmental Protection will announce the list of enterprises passed the inspections and then send it to China's Ministry of Industry and Information Technology, Commerce Department and National Bureau of Quality Inspection. China's Ministry of Environmental Protection will also regularly re-inspection and spot-inspection qualified enterprises and remove the enterprises that failed the inspection. The conduction of environment protection inspection may restrain the production capacity of glyphosate market. According to related data, environment protection policies will lead to the closure of some small and medium-sized enterprises and glyphosate market will suffer production capacity shortage.

At present, 10% glyphosate aqua is officially withdrawn from the market. By doing this, the enterprises not only lose sales share of the glyphosate aqua but also need to spend money in disposing waste liquor. The increasing costs and the limit in output volume both promote the price increase of glyphosate.

In recent years, energy is in great demand globally and every country begins to focus on the development of bio-energy. Anti-glyphosate transgenic crops like corn and soybean expand constantly and the demand for glyphosate herbicide increase greatly, promoting glyphosate price.

The glyphosate price trend in China market mainly depends on environment protection inspection. If environment protection inspection is conducted successfully, the failed enterprises will stop producing glyphosate. As a result, glyphosate will still be in shortage for a short time and its price will keep increasing. In addition, the global pesticide manufacturing giants like Monsanto and Syngenta can greatly influence glyphosate price in China market.

With the constant increase both in global bio-energy and planting area of GM crops, the global demand for glyphosate will keep growing stably. As to the industries related to glyphosate in China, there will be many investment opportunities.

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

Current Development Status of Global and China Glyphosate Industry

China's Glyphosate Production Capacity/Output Volume

Analysis on China's Import and Export of Glyphosate

Major Enterprises and Their Operation Status in China Glyphosate Industry

Production Costs of China Glyphosate

Factors Influencing the Development of Glyphosate Industry

Analysis on Development Trend of China Glyphosate Industry

The Following Enterprises and People are Proposed to Purchase this Report:

Herbicide Production/ Trade Enterprises

Enterprises Relate to Glyphosate Industry Chain

Investors and Research Institutes Concerned About Glyphosate Industry

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