

Note: Key data/information in this sample page is hidden, while in the report it is not.

1 Glyphosate supply

1.1 Glyphosate registration situation

As the world's most popular herbicide, glyphosate has been registered in China since the mid 1980s and now it is the herbicide with the most registration times in China. There are ■ active registrations of glyphosate by ■ companies as of March 14, 2012.

Table 1.1-1 Registrations of glyphosate by specifications in China, as of March 14, 2012

Specification		Number of registration
Single formulation	SL (396)	■
	SP (72)	
	SG/WSG (54)	
Mixed formulation		■
Technical		■
Total		■

Source: CCM International

1.2 Glyphosate technical

1.2.1 China's position in global glyphosate technical supply

China is playing a more and more important role in global glyphosate market, becoming the largest producer of glyphosate technical in the world with output (PMIDA is included) of over ■ tonnes in 2011, accounting for over ■% of global supply. Over ■% glyphosate technical producers are concentrated in China, with only several ones outside China. Over ■% of China's glyphosate output is exported to over ■ countries and regions worldwide.

Table 1.2.1-1 Key players of glyphosate technical in the world, 2008-2011

Glyphosate producer	Capacity '11, '000t/a	Production, '000 t			
		2008	2009	2010	2011
Chinese (about 50 producers)					
Monsanto (the US, Brazil, Belgium, Malaysia, Argentina)					
Atanor (Argentina)					
Nortox (Brazil)					
Cheminova (Denmark)					
Albaugh (the US)					
Excel Crop Care Ltd. (India)					
Sabero Organics Gujarat Limited (India)					
PT. Dalzon Chemicals (Indonesia)					
Others					
Total					

Source: CCM International

2.1 Global demand for glyphosate

2.1.1 Overview of global genetically modified crop

As the main driver for global glyphosate consumption, the planting area of GM crops has expanded rapidly in recent years, with a CAGR of about █% by global planting area during 2007-2011, and the CAGR of planting area of herbicide-tolerant crops was █% during 2007-2011.

Table 2.1.1-1 Planting area of GM crops by countries in the world, 1996-2011, million hectares

Country	1996	1997	1998	1999	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011
The US																
Brazil																
Argentina																
India																
Canada																
China																
Paraguay																
Pakistan																
S. Africa																
...
Planting area																
Number of countries																

Source: CCM International