

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

I Overview of global glyphosate industry

I-1 Overview of global glyphosate supply (distribution, production, circulation)

- Production

Global output of glyphosate has witnessed continuous growth, hitting █████ tonnes in 2010, with the CAGR of █████% during 2006-2010, thanks to stable global demand especially that from American countries such as the U.S., Argentina, Brazil, etc.

I-3 Forecast on global glyphosate industry for 10 years

I-3.1 Factors influencing global glyphosate supply and demand

- Driving forces

➤ Development of bio-fuels

Table Production of bio-ethanol in the US and Brazil, 2005-2009

Year	the US				Brazil			
	Bio-ethanol production, billion liters	Corn used for bio-ethanol, million tonnes	Corn production, million tonnes	Share of corn used for bio-ethanol, %	Bio-ethanol production, billion liters	Sugarcane used for bio-ethanol, million tonnes	Sugarcane production, million tonnes	Share of sugarcane used for bio-ethanol, %
2005	████	████	282	████	████	████	████	████
2006	████	████	████	████	████	████	████	████
2007	████	████	████	████	████	████	████	████
2008	████	████	████	████	████	████	████	████
2009	████	████	████	████	████	████	████	████

II-3 Competitiveness Analysis of different route

II-3.1 Comparison of technology requirement

Table II-3.1-2 Treatment fee of membrane method on AEA glyphosate alkali mother liquid

Title	RMB/t mother liquid	USD/t mother liquid
Electricity	████	████
Clean and agentia	████	████
Filter cartridge	████	████
Membrane	████	████
Maintain	████	████
Acid and alkali	1.07	████
Total	████	████

II-3.3 Cost of glyphosate technical by route

Table II-3.3.1 Production cost competition among different routes, Dec. 2010, USD/t glyphosate

Production route	AEA	DEA	IDAN
Raw material cost	■	■	■
Production cost	■	■	■
Waste water treatment fee	■	■	■
By product recovery income	■	■	■
Real cost	■	■	■

III Global glyphosate capacity integration and possible industrial transfer

III-4 Forecast on global glyphosate capacity redistribution

Table III-4-2 Scenarios of glyphosate industry transfer from Southeast China to Western China, 2011

Item	Unit	Expected Value		
		Low	Average	High
Raw material cost,	USD/t	80	■	■
Manpower cost,	USD/t	■	■	50
Environmental protection cost	USD/t	■	■	200
Transportation cost	USD/t	■	-150	■
Total cost advantage,	USD/t	10	■	■
Design capacity	t/a	50,000	50,000	50,000
Investment, million USD	USD	■	■	■
Output		20,000	■	35,000
Cost saving	USD per year	200,000	■	■
Investment payback period	Year	■	13.3	■

IV-3.3 Paraformaldehyde

Figure IV-3.3.1-4 Global distribution of paraformaldehyde production in major producing countries

Distribution by capacity in 2011

Distribution by output in 2010



■ Spain ■ Netherlands □ Belgium □ UK ■ Germany ■ Others

■ Spain ■ Netherlands □ Belgium □ UK ■ Germany ■ Others