

Production and Export of Glyphosate in China

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1. Introduction

Glyphosate is the most widely used herbicide worldwide. Looking around the world, the planting area of genetically modified plants and crops has maintained a stable growth, which drives the increasing demand for glyphosate. With the widespread promotion and application of glyphosate-resistant transgenic technology worldwide, the use of glyphosate has shown an explosive growth. Glyphosate is still the herbicide species with the largest share worldwide, though its market size and global share have declined slightly recent years due to the resistance of weeds, and the impact of prohibition and restriction policies.

China is the biggest producer and export country of glyphosate technical, and the export of glyphosate has been paid closely attention by overseas consumers. And there will be no new capacity of glyphosate in China in the next few years because of its overcapacity. In 2020, the supply of glyphosate technical fluctuated, for its output was negatively affected by COVID-19 in H1, and challenged by floods in Aug.

In order to clearly understand the external supply of glyphosate in China, CCM analyzes the general export situation of glyphosate technical in China in 2020 based on glyphosate capacity, output, historical export volumes, etc. In this report, CCM will do overview of glyphosate in China from the following aspects:

- ✓ Output and export of herbicide technical and pesticide technical in China, 2016–2020
- ✓ Proportion trends of glyphosate technical in herbicides technical and pesticides technical, 2016–2020
- ✓ Proportion of export volume to output of key glyphosate technical manufacturers in China, 2018–2020
- ✓ Glyphosate export price, 2018–2020
- ✓ Changes and impact factors of glyphosate technical export by month, 2020
- ✓ China's major export destinations of glyphosate technical
- ✓ Glyphosate technical export trends of different countries and regions, 2018–2020

2. Approach for this report

The report is drafted by diverse methods as follows:

- Desk research

The sources of desk research are various, including published magazines, journals, government websites and statistics, industrial statistics, association seminars as well as information from the Internet. A lot of work has gone into the compilation and analysis of the obtained information.

- Internet

CCM visited government websites and contacted with players in the domestic agrochemical industry through B2B websites and software.

- Data processing and presentation

The data collected and compiled are sourced from:

- ✓ CCM's database
- ✓ Published articles in periodicals, magazines, journals and third-party databases
- ✓ Statistics from governments and international institutes
- ✓ Telephone interviews with domestic producers, joint ventures, service suppliers and governments
- ✓ Third-party data providers
- ✓ Comments from industrial experts
- ✓ Professional databases from other sources
- ✓ Information from the internet

The data from various sources have been combined and cross-checked to make this report as precise and scientific as possible. Throughout the process, a series of internal discussions were held in order to analyse the data and draw the conclusions.

3. Executive summary

Glyphosate, invented in 1971, was widely used to remove weeds planted in crop fields for its high efficiency, wide spectrum, low toxicity and safety. It provided an important guarantee for increasing agricultural production and harvest steadily, which played an important role among herbicides and even pesticides for a long time.

China is a major producer and exporter of glyphosate, whose exported glyphosate technical have been trusted by overseas consumers. By the end of 2020, the capacity of glyphosate technical in China was XXX t/a. The top three domestic glyphosate technical manufacturers are XXX, XXX and XXX, accounting for XXX of the total. In 2020, China's glyphosate technical export volume was XXX tonnes, accounting for about XXX of global consumption, slightly lower than that in 2019. Due to strict environmental supervision, Sino-US trade war and global epidemic, glyphosate production and export in 2020 were limited. Besides, the export price of glyphosate technical was relatively stable in H1, but continued to rise in H2 in 2020.

The global glyphosate market is highly concentrated. The top five consumption regions are XXX, XXX, XXX, XXX and XXX, accounting for XXX of the total in 2020. According to the data in Jan.–Dec. 2020 and the change trend of volume and price since 2018, XXX and XXX have the most stable market performance, witnessing gradual increases in export volume in recent three years. Other countries with both volume and price increases are XXX, XXX, XXX and XXX. XXX, XXX, XXX and XXX all saw double declines in export volume and price.

4. What's in this report?

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

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1 Herbicide and pesticide output and export in China, 2016–2020

The output of herbicide technical (converted into 100% AI, hereinafter) decreased from XXX in 2016 to XXX in 2019, and increased slightly to XXX in 2020. From 2016 to 2020, the lowest export volume of herbicide technical was XXX in 2016, and the highest was XXX in 2020, with a CAGR of XXX. The export value of herbicide showed an overall upward trend, reaching XXX in 2020, with a yearly increase of XXX.

The export volume of pesticide technical in China achieved a substantial growth in 2020, reaching XXX, with a year-on-year increase of XXX; the export value was XXX, up by XXX year on year.

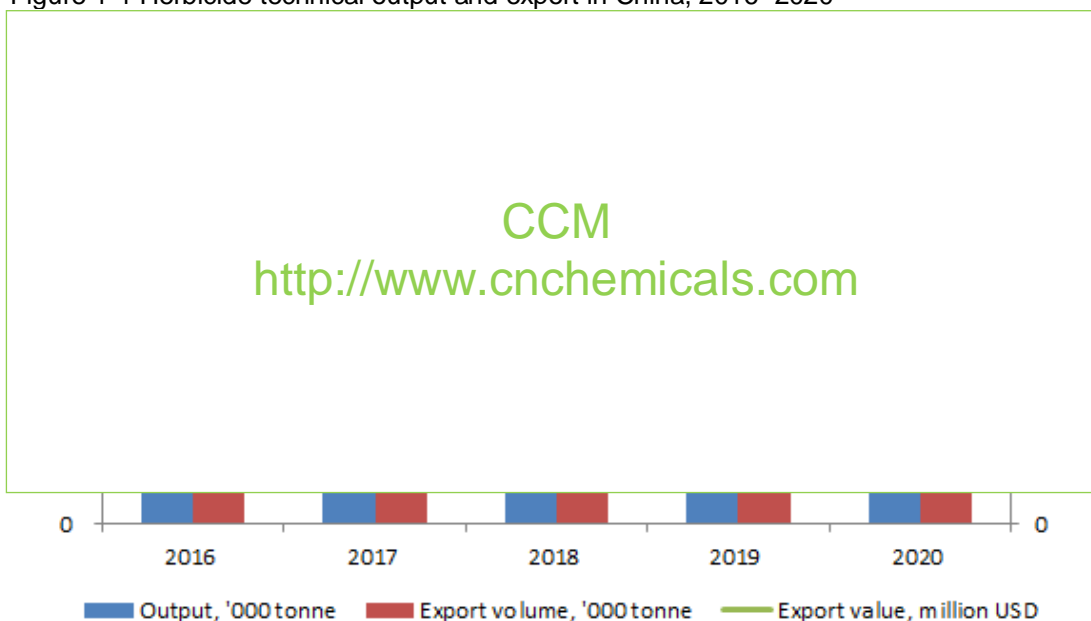
Table 1-1 Herbicide technical output and export in China, 2016–2020

Year	Output, '000 tonne	YoY change	Export volume, '000 tonne	YoY change	Export value, million USD	YoY change
2016	XXX	XXX	XXX	XXX	XXX	XXX
2017	XXX	XXX	XXX	XXX	XXX	XXX
2018	XXX	XXX	XXX	XXX	XXX	XXX
2019	XXX	XXX	XXX	XXX	XXX	XXX
2020	XXX	XXX	XXX	XXX	XXX	XXX

Note: The output, export volume, export value here is converted into 100% AI.

Source: National Bureau of Statistics

Figure 1-1 Herbicide technical output and export in China, 2016–2020



Note: The output, export volume, export value here is converted into 100% AI.

Source: National Bureau of Statistics

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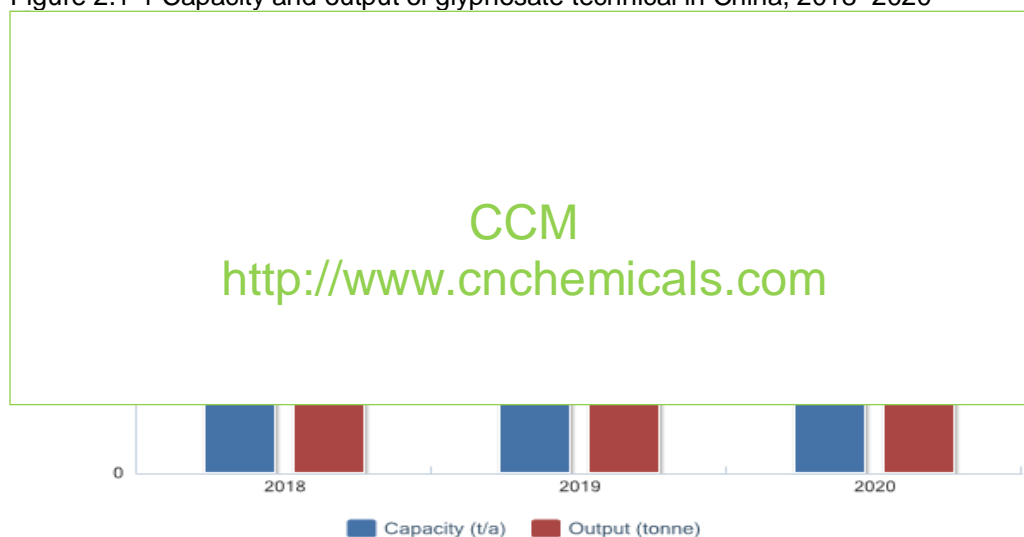
2 Production of glyphosate technical in China

2.1 Capacity and output of glyphosate technical in China, 2018–2020

Compared with 2018, the capacity of glyphosate technical in China witnessed a decrease in 2019, reaching XXX. In 2020, the capacity maintained the same as that in 2019. Since 2018, the Ministry of Agriculture and Rural Affairs of the People's Republic of China has vigorously promoted the action of zero growth in pesticide use. In recent years, with the introduction of environmental inspection regulations and related policies, the capacity of glyphosate technical in China has been reduced, and many small and medium glyphosate technical enterprises fail to meet the environmental protection standards have withdrawn. As of 2019, there were only XXX active glyphosate technical manufacturers in China. These XXX glyphosate enterprises are large-scale with high investment in environmental protection. Since 2013, they have successively carried out environmental protection investment and process transformation, so their capacity was stable.

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Figure 2.1-1 Capacity and output of glyphosate technical in China, 2018–2020



Source: CCM

2.2 Output and export of glyphosate technical in key manufacturers in China, 2018–2020

Due to the dual impact of supply-side structural reform and environmental supervision, the supply of glyphosate in China tightens and its production capacity continues to shrink. In 2020, there were only XXX glyphosate producers in China, including XXX in Jiangsu Province, XXX in Sichuan Province, and the rest in Zhejiang Province, Henan Province, Anhui Province, Hubei Province and Inner Mongolia Autonomous Region. As of 2020, the capacities of Hubei Xingfa Chemicals Group Co., Ltd., Fuhua Tongda Agro-chemical Technology Co., Ltd., and Zhejiang Wynca Chemical Industry Group Co., Ltd. are XXX, XXX, XXX respectively, ranking the top three in China.

Hubei Trisun, 75% shares held by Hubei Xingfa Chemicals Group Co., Ltd., is one of the largest glyphosate technical producers in China, with a capacity of XXX glyphosate technical, only next to Fuhua Tongda. In particular, Hubei Xingfa acquired Inner Mongolia Tenglong Fine Chemical Co., Ltd. in 2018, achieved a total capacity of XXX glyphosate technical. Its continuous optimization and improvement of glyphosate process parameters, product structure adjustment and loss reduction have achieved remarkable results in stabilizing quality, increasing output, reducing cost and increasing efficiency.

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In China, the synthetic processes of glyphosate mainly include glycine method and IDA method. Compared with glycine method, IDA method has the advantages of lower environmental protection cost and higher comprehensive yield, which can produce glyphosate technical with a purity of over XXX. Under the current high pressure situation of environmental protection, IDA method will be the development direction of enterprises in the future. But at present, most domestic manufacturers still use glycine method. Only Jiangsu Yangnong Chemical Group Co., Ltd., Nantong Jiangshan Agrochemical & Chemicals Co., Ltd., Jiangsu Good Harvest-Weien Agrochemical Co., Ltd. and Leshan Hebang Agricultural Technology Co., Ltd. started their operations with IDA method.

Table 2.2-1 Basic info of glyphosate technical key manufacturers in China

No.	Company	Abbreviation	Location	Launch time	Pathway	Capacity (t/a), as of 2020	Status, 2020
1	Fuhua Tongda Agro-chemical Technology Co., Ltd.	Fuhua Tongda	XXX	XXX	XXX	XXX	XXX
2	Hubei Trisun Chemicals Co., Ltd.	Hubei Trisun	XXX	XXX	XXX	XXX	XXX
	Inner Mongolia Xingfa Technology Co., Ltd. (Inner Mongolia Tenglong Fine Chemical Co., Ltd.)	Inner Mongolia Xingfa (Inner Mongolia Tenglong)	XXX	XXX	XXX	XXX	XXX
3	Zhejiang Wynca Chemical Industry Group Co., Ltd.	Zhejiang Wynca	XXX	XXX	XXX	XXX	XXX
	Zhenjiang Jiangnan Chemical Co., Ltd.	Zhenjiang Jiangnan	XXX	XXX	XXX	XXX	XXX
4	Nantong Jiangshan Agrochemical & Chemicals Co., Ltd.	Nantong Jiangshan	XXX	XXX	XXX	XXX	XXX
5	Jiangsu Good Harvest-Weien Agrochemical Co., Ltd.	Jiangsu Weien	XXX	XXX	XXX	XXX	XXX
6	Leshan Hebang Agricultural Technology Co., Ltd.	Leshan Hebang	XXX	XXX	XXX	XXX	XXX
7	Jiangsu Yangnong Chemical Group Co., Ltd.	Jiangsu Yangnong	XXX	XXX	XXX	XXX	XXX
8	Henan HDF Chemical Co., Ltd.	Henan HDF	XXX	XXX	XXX	XXX	XXX
9	Jiangxi Jinlong Chemical Co., Ltd.	Jiangxi Jinlong	XXX	XXX	XXX	XXX	XXX
10	Anhui Dongzhi Guangxin Agrochemical Co., Ltd.	Anhui Guangxin	XXX	XXX	XXX	XXX	XXX
11	Shandong Weifang Rainbow Chemical Co., Ltd.	Shandong Rainbow	XXX	XXX	XXX	XXX	XXX
12	CAC Nantong Chemical Co., Ltd.	CAC International	XXX	XXX	XXX	XXX	XXX
13	ADAMA Ltd. (Hubei Sanonda Co., Ltd.)	ADAMA	XXX	XXX	XXX	XXX	XXX
14	Guang'an Chengxin Chemical Co., Ltd.	Guang'an Chengxin	XXX	XXX	XXX	XXX	XXX
15	Shandong Binnong Technology Co., Ltd.	Shandong Binnong	XXX	XXX	XXX	XXX	XXX

Note: 1. Hubei Trisun and Inner Mongolia Xingfa are both the subsidiaries of Hubei Xingfa Chemicals Group Co., Ltd.

2. Zhenjiang Jiangnan is one of subsidiaries of Zhejiang Wynca.

Source: CCM

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3 Foreign trade overview

3.1 Export of glyphosate technical in China by month, 2018–2020

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Table 3.1-1 Export volume, price and value of glyphosate technical in China by month, 2020

Month	Export volume, tonne	YoY change	Export price, USD/kg	YoY change	Export value, USD	YoY change
Jan.	XXX	XXX	XXX	XXX	XXX	XXX
Feb.	XXX	XXX	XXX	XXX	XXX	XXX
March	XXX	XXX	XXX	XXX	XXX	XXX
April	XXX	XXX	XXX	XXX	XXX	XXX
May	XXX	XXX	XXX	XXX	XXX	XXX
June	XXX	XXX	XXX	XXX	XXX	XXX
July	XXX	XXX	XXX	XXX	XXX	XXX
Aug.	XXX	XXX	XXX	XXX	XXX	XXX
Sept.	XXX	XXX	XXX	XXX	XXX	XXX
Oct.	XXX	XXX	XXX	XXX	XXX	XXX
Nov.	XXX	XXX	XXX	XXX	XXX	XXX
Dec.	XXX	XXX	XXX	XXX	XXX	XXX
Total	XXX	XXX	XXX	XXX	XXX	XXX

Note: Export volume in this figure is the actual export volume.

Source: CCM and China Customs

In 2020, the export volume of glyphosate technical in China was XXX. In terms of monthly export, XXX saw the largest export volume, altogether accounting for XXX of the annual export volume, while XXX witnessed the least export volume. Compared with 2019, the output of glyphosate technical in China increased steadily in 2020, and the export also increased slightly.

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