

IV-2 Glyphosate technical

- China's position in the world glyphosate technical supply

Table IV-2-1 Key players of glyphosate technical in the world ('000 tonnes)

Glyphosate producers	PMIDA			Glyphosate technical	
	Output '08	Source		Capacity '09	Output '08
		Self-supply	Outsource		
About 50 Chinese producers	■	■	■	■	■
Monsanto (US, Argentina, Brazil, Belgium, Malaysia)	■	■	■	■	■
Atanor (Argentina)	■	■	■	■	■
Nortox (Brazil)	■	■	■	■	■
■	■	■	■	■	■
■	■	■	■	■	■
■	■	■	■	■	■
■	■	■	■	■	■
■	■	■	■	■	■
■	■	■	■	■	■
Total	■	■	■	■	■

Source: CCM International

Note: Only PMIDA production circulated in the market is calculated. Monsanto's PMIDA is consumed by itself.

Table IV-2-2 Situation of China's glyphosate output in global market, 2005-2008 (tonne)

Year	Global output	China output	China share	PMIDA output	Total*	Share

2004	■	■	■	■	■	■
2005	■	■	■	■	■	■
2006	■	■	■	■	■	■
2007	■	■	■	■	■	■
2008	■	■	■	■	■	■

Total* including the glyphosate technical and that converted from PMIDA

Source: CCM International

Table IV-2-3 Situation of China's glyphosate in the overseas market, 2004-2008 (tonne)

Year	Overseas consumption*	Export	Share	Export of PMIDA	Total	Share
2004	■	■	■	■	■	■
2005	■	■	■	■	■	■
2006	■	■	■	■	■	■
2007	■	■	■	■	■	■
2008	■	■	■	■	■	■

Overseas consumption* means the demand excluding China's

Total* including the glyphosate technical and glyphosate technical converted from PMIDA

Source: CCM International

VII-2 Domestic demand for glyphosate

VII-2.1 Overview of Chinese glyphosate technical consumption

VII-2.2 Position and market size of glyphosate in herbicide industry

Table VII-2.2-1 Supply and consumption of herbicides and its share in glyphosate, 2004~2008
(Calculated by AI, tonne)

Year	Output			Consumption		
	Herbicide	Glyphosate	Share	Herbicide	Glyphosate	Share
2004						
2005						
2006						
2007						
2008						

Source: CCM International

As a non-selective herbicide, after so many years' promotion, glyphosate has an irreplaceable position in the [REDACTED]. And its consumption had grown at [REDACTED] use in China.

VII-2.3 Glyphosate formulations use in China

☞ by specific formulation

Table VII-2.3-1 Consumption of main glyphosate formulations in China, 2004~2008, tonne

Main formulations	2004	2005	2006	2007	2008	CAGR, 04~08
10%SL						
41%SL						
20%SL						
Others						
Total						

Source: CCM International

Note: Others mainly include WP, especially 50%WP.

Table VII-2.3-2 Provinces with 41%IPA consumption exceeding 800 tonnes in 2008, tonne

Province	41%IPA consumption	10%SL consumption	20%SL consumption	50%WP consumption	Total	Share of 41%IPA

Heilongjiang		■		■			■		■
Sichuan		■		■			■		■
Guangdong		■		■			■		■
Jilin		■		■			■		■
Shaanxi		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■
■		■		■			■		■

Source: CCM International

☞ **by crop**

Table VII-2.3-3 Planting area of main crops in China, 2004~2008, 000' hectares

Main crops	2004	2005	2006	2007	2008	CAGR '04-'08
Rice	■	■	■	■	■	■
Wheat	■	■	■	■	■	■
Corn	■	■	■	■	■	■
Soybean	■	■	■	■	■	■
Cotton	■	■	■	■	■	■
Sugarcane	■	■	■	■	■	■
Tea	■	■	■	■	■	■
Rubber	■	■	■	■	■	■
orchard	■	■	■	■	■	■
Total	■	■	■	■	■	■
Share in total crop area	■	■	■	■	■	■

Source: Ministry of Agriculture

Note: Number with * is estimated by CCM International

Table VII-2.3-4 Glyphosate consumption in main crops in China, 2004~2008, tonne

Crop	2004	2005	2006	2007	2008	CAGR 04-08
Orchard	■	■	■	■	■	■
Corn	■	■	■	■	■	■
Rubber	■	■	■	■	■	■
Rice	■	■	■	■	■	■
Soybean	■	■	■	■	■	■
Cotton	■	■	■	■	■	■
Wheat	■	■	■	■	■	■
Sugarcane	■	■	■	■	■	■
Tea	■	■	■	■	■	■
Others	■	■	■	■	■	■

Total						
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Source: CCM International

Note: Others mainly include weeding for wasteland reclamation, non-agriculture use, etc.

✓ **Orchard**

Orchard covered an area of [redacted] year on year. And the main fruits with large planting area were apple, orange, pear, peach, litchi and grape.

Table VII-2.3-5 Glyphosate consumption in main fruits, 2004~2008, calculated by AI, tonne

Main fruits	2004	2005	2006	2007	2008	CAGR,04~08
Orange						
Apple						
Litchi						
Pear						
Grape						
Others						
Total						
Share in total						

Source: CCM International