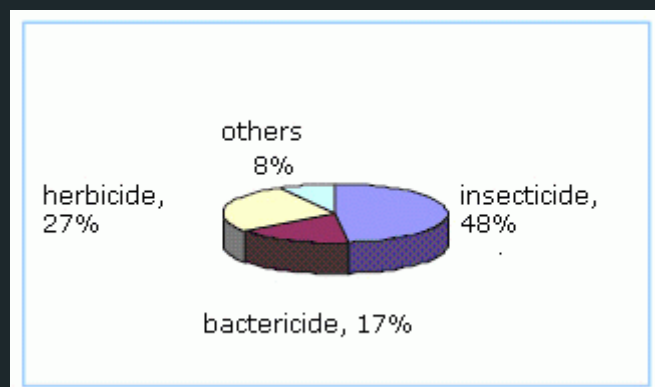


## China Glyphosate Industry Report, 2007-2008



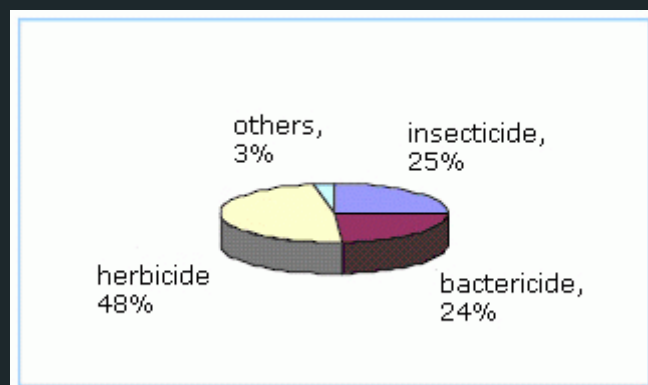
Pesticide mainly consists of three categories: herbicide, insecticide and bactericide. In China, the most general pesticide we currently use is insecticide which occupies nearly 50% of the total use in pesticide. That totally differs from the international situation that the herbicide's use occupies 48% of the total and the insecticide 25%. With the internationalization of the production and sales of pesticide and domestic improvement on pesticide structure, herbicide will have more development space and develop more rapidly.

### Pesticide Use Ratio in China



Source: Rising Securities

### Pesticide Use Ratio in Foreign Countries



Source: Rising Securities

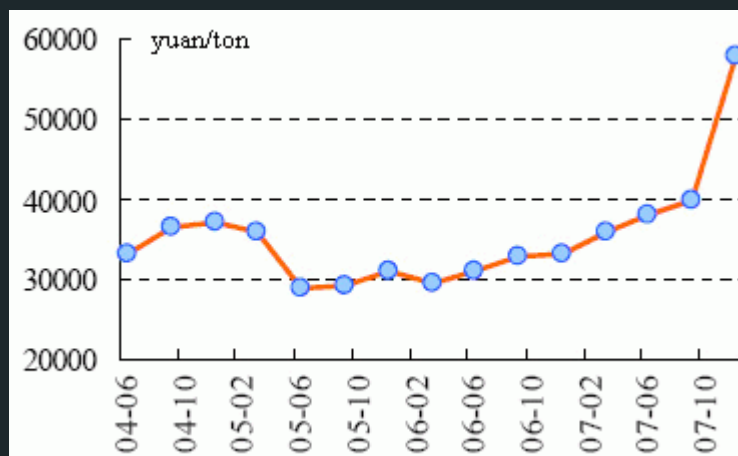
Glyphosate is a kind of highly effective broad spectrum herbicide with the characteristics of broad spectrum, low toxicity and no residue. It is the best selling herbicide around the world. No matter crop or weed, generally, all green plants can be ruined after we spray Glyphosate over them.

Glyphosate is mainly sold to United States of America, European Union, Argentina and other countries and areas. The consumption of Glyphosate in big agricultural countries such as China and India is small and has huge growth potential.

Glyphosate occupies more than 30% of the herbicide sales volume all around the world and has the trend of continuous increase. Recently, the market demand of Glyphosate increases rapidly, with the growth rate of approximately 15-20% each year.

Due to the fast growth in the demand and the biggest Glyphosate manufacturer of Mengshan shutting down part of the production capacity, Glyphosate is in short supply. The price rises accordingly.

**China Glyphosate Price, June 2004-Oct 2007 (Yuan/ton)**



Source: [www.chinaccm.com](http://www.chinaccm.com)

According to the data of National Bureau of Statistics, General Administration of Customs, and related listed companies, this report makes a research on the status quo, supply and demand, production technique as well as key companies of China Glyphosate industries. It also contrasts the costs of Glyphosate by different production technique and analyzes the fluctuation risk of the raw materials made by different production lines.

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# Selected Charts

China pesticide use ratio

Global Glyphosate consumption distribution, 2006

Global production capacity distribution, 2007

China Glyphosate price tendency, 2004-2007

Prime operating revenue and operating profit of Zhejiang Xin'an Chemical Industry Group Co., Ltd., 2004-2007

Revenue composition of Zhejiang Xin'an Chemical Industry Group Co., Ltd., 1H, 2007

Prime operating revenue and operating profit of Zhejiang Jiangshan Chemical Co., Ltd., 2004-2007

Prime operating profit composition of Zhejiang Jiangshan Chemical Co., Ltd., 1H, 2007

Prime operating revenue composition of Zhejiang Jiangshan Chemical Co., Ltd., 1H, 2007

Glyphosate functions

Production capacity and expansion of Glyphosate manufacturers

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Contrast of production technique between Anhui Huaxing Chemical Industry Co., Ltd. and other domestic Glyphosate manufacturers

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