

China's agrochemical makers pour investment into Glufosinate-P

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New investments, plant conversions and a growing registration base are pushing China's glufosinate-P industry into a new phase of competition



China's glufosinate-P market is entering a new investment cycle, with manufacturers moving aggressively to build capacity, convert existing production lines and secure registrations for the herbicide and its ammonium salt. By August 2026, eight Chinese companies had announced projects or production adjustments related to glufosinate-P, signalling that the product is moving from a relatively specialised segment toward a larger industrial opportunity.

The expansion is notable for its scale. New projects and capacity conversions announced during the year are expected to push China's overall glufosinate-P capacity beyond 100,000 tonnes per year, according to industry data. The investment wave includes both large greenfield projects and conversions of existing glufosinate-ammonium facilities, suggesting that producers are positioning themselves for a structural shift in the herbicide market rather than simply adding incremental capacity.

The largest projects already announced provide a clear indication of the scale of the industry's ambitions. Guang'an Lier Chemical Co., Ltd. plans to establish 30,000 t/a of glufosinate-P technical capacity as part of a broader 43,000 t/a pesticide technical-material project. The company already has experience in the segment and holds a valid Chinese registration for glufosinate-P.

Lier's expansion comes as the company strengthens its technical-material business. In the first half of 2026, Lier reported revenue of RMB 4.82 billion, representing a 6.86% year-on-year increase, while net profit stood at RMB 249.5 million, down 7.77% year on year. Its technical-products business generated RMB 2.98 billion, up 8.21% from the same period a year earlier and accounting for 61.9% of total revenue. Glufosinate-ammonium and L-glufosinate-ammonium were among the products benefiting from improved demand and pricing conditions.

Shaoxing Shangyu Donghu Chemical Co., Ltd. is making an equally large bet on the segment. The company has announced an investment of approximately RMB 304 million in a dedicated 30,000 t/a glufosinate-P technical project. The investment places Donghu among the companies making the most substantial new commitments to the product in 2026. The company also holds a valid registration for glufosinate-P-ammonium, with its registration running until October 29, 2030.

Not all manufacturers are choosing to build completely new facilities. Inner Mongolia Lingsheng Crop Science Co., Ltd. plans to convert three workshops originally associated with a 50,000 t/a glufosinate-ammonium project to glufosinate-P production. The converted facilities are expected to provide approximately 20,000 t/a of glufosinate-P capacity.

The conversion is significant because it illustrates another route into the market. Instead of committing entirely to greenfield construction, manufacturers with existing glufosinate infrastructure can redirect production assets toward glufosinate-P. This could allow companies to respond more quickly to market opportunities while making use of existing plants, utilities and manufacturing capabilities.

Hunan Haili Chemical Industry Co., Ltd. is taking the greenfield route. The company plans to invest approximately RMB 231 million, equivalent to about USD 32.5 million, in a new project in Chenzhou, Hunan. The project is expected to produce 10,000 t/a of glufosinate-P once completed, with construction scheduled to take around 18 months.

Haili's project also represents an important milestone for the industry because it brings the number of Chinese companies entering or expanding into the glufosinate-P segment during 2026 to eight.

The broader list includes Zhejiang Wynca Chemical Co., Ltd., Gansu Binnong Technology Co., Ltd., Hunan Lier Biotechnology Co., Ltd. and Shandong Wanhao Industry Group Co., Ltd. Their projects and production adjustments range from new technical-material capacity to changes in existing pesticide and formulation facilities.

The activity involving Zhejiang Wynca Chemical is particularly important because the company had already established an industrial foothold in glufosinate-P. Wynca's 20,000 t/a glufosinate-P industrialisation project began construction in May 2023, with Phase I entering trial production in May 2024, three months ahead of its original schedule. The project demonstrated that Chinese manufacturers were prepared to commit substantial resources to commercial-scale L-glufosinate production even before the latest 2026 investment wave.

The new projects therefore represent an acceleration of an existing trend rather than the beginning of China's glufosinate-P industry. What has changed in 2026 is the number of companies pursuing the opportunity and the variety of strategies being used to build market positions.

The registration landscape reinforces that shift.

As of August 6, 2026, China had valid registrations for both glufosinate-P and glufosinate-P-ammonium. The registration holders include a growing group of domestic agrochemical companies, giving the market a broader competitive base.

Among the valid glufosinate-P registrations is PD20260020, held by Jiangsu Noon Crop Science Co., Ltd., with an expiration date of January 20, 2031. Shandong Weifang Rainbow Chemical Co., Ltd. holds registration EX20250253, valid until December 21, 2030, while Lier Chemical Co., Ltd. holds registration PD20201020, valid until November 24, 2030. Liaoning Youchuang Plant Protection Co., Ltd. holds registration PD20252196, valid until August 31, 2030.

The glufosinate-P-ammonium side of the market is even more populated. Seven Continent Green Chemical (Jining) Co., Ltd. holds registration PD20212914, valid until December 15, 2031. Shandong Luba Chemical Co., Ltd. holds PD20210183, valid until March 10, 2031, while Fuhua Tongda Chemical Co., Ltd. holds PD20260594, valid until March 1, 2031.

Ningxia Yongnong BioSciences Co., Ltd. holds registration PD20260021, valid until January 20, 2031, while Hebei Veyong Bio-chemical Co., Ltd. holds PD20253837, valid until December 21, 2030.

Other registered glufosinate-P-ammonium producers include Shaoxing Shangyu Eastlake Chemical Co., Ltd., with registration PD20252937 valid until October 29, 2030; Inner Mongolia Miraculous Crop Science Co., Ltd., with PD20252934; Jiangsu Chunjiang Runtian Agrochemical Co., Ltd., with PD20252929; and Anhui Red Sun Biochemistry Co., Ltd., with PD20252926. All three registrations expire on October 29, 2030.

Changqing (Hubei) Bio-tech Co., Ltd. holds registration PD20252644, valid until September 24, 2030, while Yongnong BioSciences Co., Ltd. holds PD20252197, valid until August 31, 2030.

The registration pipeline is also expanding beyond technical products. A proposed-registration list released in late 2025 covering China's 14th and 15th batches included 192 herbicide products, among them applications for two glufosinate-P technical products and 23 glufosinate-P mixed formulations. That indicates that manufacturers are looking beyond technical-material production toward finished formulations and differentiated product combinations.

The commercial attraction of glufosinate-P is closely linked to its positioning as the more active L-enantiomer of conventional glufosinate. Conventional glufosinate contains both optical isomers, while glufosinate-P represents the herbicidally active component. Manufacturers have therefore positioned glufosinate-P as a product capable of delivering greater herbicidal efficacy at lower application rates.

Wynca has promoted its glufosinate-P technology around a "double efficacy and half dosage" proposition compared with conventional glufosinate-ammonium. The company has also indicated that glufosinate-P historically commanded a premium, with its price around 1.5 to 1.6 times that of conventional glufosinate-ammonium. That price differential creates an economic incentive for manufacturers to develop production technology and secure registrations for the higher-value product.

The market backdrop has also provided additional encouragement. In June 2026, conventional glufosinate-ammonium supplies were reported to be relatively tight, with domestic quotations exceeding RMB 50,000/t, while L-glufosinate-ammonium prices at 100% purity rose above RMB 65,000/t. These price levels have strengthened the investment case for producers looking to capture value from the L-form.

Yet the expansion is occurring at a time when China's broader pesticide industry is not experiencing uniformly strong conditions.

By August, the Chinese pesticide technical-material market had entered its traditional seasonal slowdown. Downstream formulators were largely drawing down existing inventories rather than undertaking aggressive restocking, while prices for many major pesticide products remained stable or declined. Producers were responding through maintenance and output adjustments as supply-demand conditions remained challenging.

That makes the scale of the glufosinate-P investment pipeline even more significant. Companies are committing capital to the segment despite weakness across parts of the broader pesticide market, suggesting that they see glufosinate-P as a structural growth opportunity rather than simply a short-term pricing play.

But the investment boom also creates a new challenge: capacity absorption.

The four major projects announced by Guang'an Lier, Shaoxing Shangyu Donghu, Inner Mongolia Lingsheng and Hunan Haili alone represent 90,000 t/a of glufosinate-P capacity. Guang'an Lier contributes 30,000 t/a, Donghu another 30,000 t/a, Lingsheng adds 20,000 t/a through conversion and Haili brings another 10,000 t/a. This is before accounting for the capacity associated with other companies entering the segment.

Hunan Lier's planned 50,000 t/a glufosinate-P technical capacity and Wynca's earlier 20,000 t/a industrialisation project add further weight to the industry's emerging supply pipeline.

The implications extend well beyond China. Chinese manufacturers are among the most important suppliers to the international crop-protection market, meaning additional domestic capacity could eventually influence global availability, pricing and sourcing strategies.

Export markets, however, are becoming more complicated. India has been reviewing the impact of anti-dumping measures on Chinese-origin glufosinate and its salts. The development highlights the growing importance of trade policy for Chinese agrochemical manufacturers as they look to place additional production overseas.

For glufosinate-P producers, therefore, the challenge will not simply be to build capacity. They will need to establish registrations, develop downstream demand, compete on production costs and secure access to international markets capable of absorbing the additional supply.

The industry's current trajectory nevertheless leaves little doubt about the direction of investment. China is building a much larger glufosinate-P manufacturing base, with producers pursuing dedicated plants, converting existing glufosinate-ammonium facilities and expanding their registration portfolios at the same time.