

2022 Customised report

Impact of COVID-19 on China pesticide supply and logistics

Key words: Pesticide / Supply / Logistics / COVID-19

Researched & Prepared by Kcomber Inc.

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01

Introduction and methodology

COVID-19 hit Shanghai hard and disrupted the pesticides logistics and shipment nationwide, especially in the East China region in Q1 2022. To find out to what extent does the pandemic impact China's agrochemical supply chain, CCM researches on its pesticides supply and logistics, and sources information through desk research and telephone investigation.

➤ 1.1 Introduction

To find out the pandemic's impact on China's agrochemical supply chain, CCM researches on the following aspects:

- ✓ Impact on pesticide supply
- ✓ Impact on the cost of logistics and shipment
- ✓ Impact on the duration of logistics and shipment
- ✓ Logistics control Regulations
- ✓ Port situation
- ✓ Import and export

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➤ 1.2 Methodology

STEP2

Investigation

Concerning the impact on agrochemical supply chain, logistics and shipment, CCM obtains latest information from:

- ✓ *Pesticide manufacturers in East China*
- ✓ *Logistics and shipment companies*
- ✓ *Logistics associations*
- ✓ *Customs institutes*

STEP1

Desk Research

The information collecting are mainly sourced from:

- ✓ *National Bureau of Statistics (NBS),*
- ✓ *China Crop Protection Industry Association (CCPIA)*
- ✓ *Ministry of Transport of the People's Republic of China (MTC)*
- ✓ *China Customs*
- ✓ *Tranalysis Database*
- ✓ *CCM Database*

STEP3

Report generation

The process of completing report was supported by:

- ✓ *Data Publishing System (DPS)*
- ✓ *Quality Control Department*

Throughout the process, the data from various sources were collected, analysed and discussed to draw the conclusions, and were cross-checked to make the final version report as precise and scientific as possible.

02

Pesticide supply

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2.1 Impact during 2019–2021

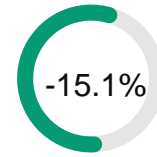
➤ Impact during 2019–2020

Since 2020 when the first wave of COVID-19 stroke Central China, the nationwide lockdowns and traffic control have imposed a negative influence on the production and logistics of pesticide technical and delayed the operation resumption of upstream and downstream enterprises.

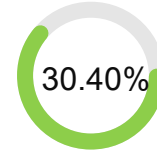
Output of Pesticide Technical in Central China by quarter in 2020, tonne

Region	Q1	Q2	Q3	Q4	Total in 2020	YoY change
Hubei Province	26,900	41,200	41,400	39,500	149,000	-15.10%
Hunan Province	32,900	16,800	13,600	66,700	130,000	30.40%
Henan Province	21,800	26,200	24,000	10,000	82,000	1.40%
Total	81,600	84,200	79,000	116,200	361,000	1.39%

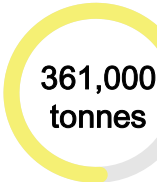
Sources: National Bureau of Statistics (NBS), China Crop Protection Industry Association (CCPIA) and CCM
Note: Output figure is based on 100% active ingredient



In Q1, the output of pesticide TC in *Hubei Province* dropped compared with 2019, amid the outbreak of the COVID-19 in Wuhan City.



In Q2–Q3, the pandemic-hit neighbouring areas like *Hunan Province* met production decline; yet entering in Q4, the implementation of control measures pushed up the local output.



With effective control taken by the governments, the total output of Central China was still up by 1.39% year on year.

➤ Impact in full 2021

The timely resumption of production allowed China's pesticide industry to return normal operation in 2021.

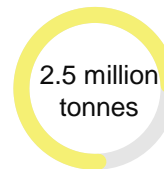
China's pesticide technical output in 2021, tonne

No.	Region	2021	2020 vs 2021	2019 vs 2021
1	Jiangsu Province	549,200	-5.64%	-10.26%
2	Sichuan Province	308,000	11.59%	-17.98%
3	Shandong Province	291,600	2.32%	29.43%
4	Zhejiang Province	237,100	23.49%	27.69%
5	Anhui Province	224,200	39.25%	130.05%
6	Hunan Province	168,500	29.62%	69.02%
7	Hubei Province	153,000	2.68%	-12.82%
8	Henan Province	100,600	22.68%	24.40%
9	Ningxia Hui Autonomous Region	59,300	64.72%	120.07%
10	Hebei Province	52,700	46.39%	26.04%
11	Gansu Province	47,600	28.65%	196.15%
12	Inner Mongolia Autonomous Region	35,100	-18.37%	-16.98%
13	Guangxi Zhuang Autonomous Region	29,000	-6.45%	-27.22%
14	Guangdong Province	22,800	14.00%	-37.41%
	Others	219,300	155.00%	10.47%
	Total	2,498,000	16.40%	10.83%

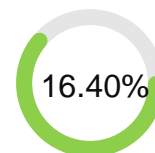
Sources: CCPIA and CCM

Note: Output is based on 100% active ingredient

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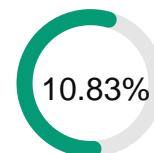


China's overall output ramped up in 2021 with Jiangsu Province in East China topping the list.



From 2020

vs.



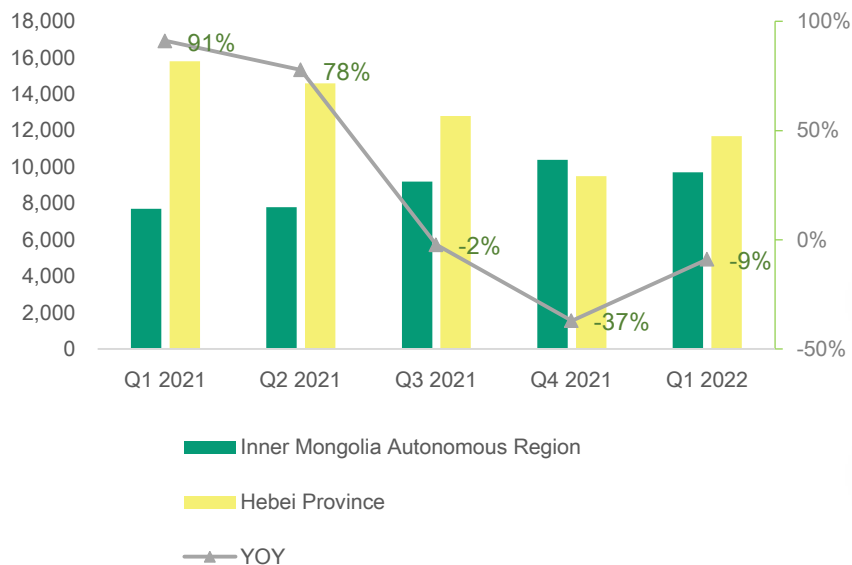
From 2019

The production of China's pesticide technical saw bigger recovery in 2021.

➤ Impact in late 2021

The outbreaks in North China affected the output of pesticide technical.

Output of technical in North China in Q1 2021-Q1 2022, tonne



Sources: CCPIA and CCM

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Pesticide technical output change in North China, 2020, 2021, 2022

Region	2021 vs 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022 vs Q1 2021
Inner Mongolia Autonomous Region	-18.37%	165.52%	-22.00%	-36.99%	-32.90%	25.97%
Hebei Province	46.39%	68.09%	461.54%	62.03%	-40.99%	-25.95%
Total	11.14%	91.06%	77.78%	-2.22%	-37.03%	-8.94%

Sources: CCPIA and CCM



Inner Mongolia Autonomous Region

- 2021 Output lost 18.37% compared with the 2020 total.
- In Q1 2022, output fell again, by 6.73% QoQ.



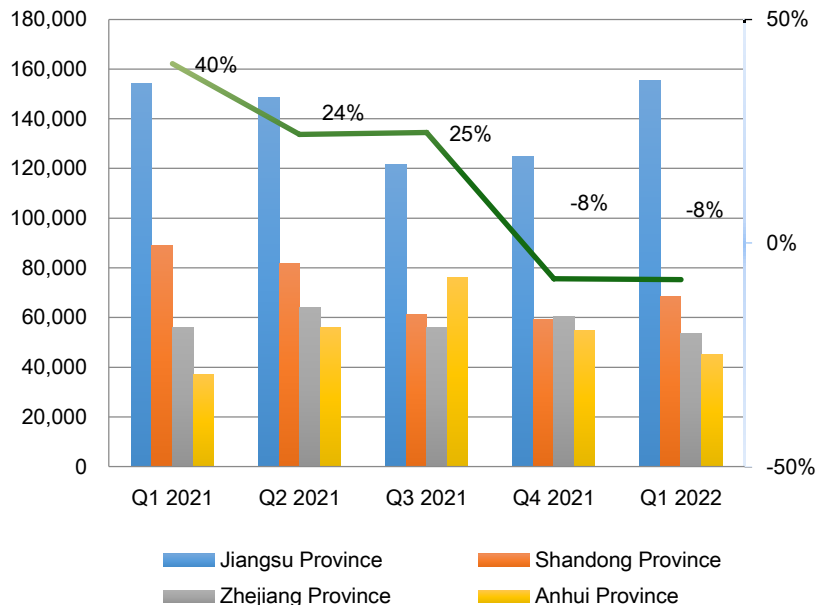
Hebei Province

- The spread of Delta variant exerted a toll on production; output in Q4 2021, slumped 40.99% YoY;
- In Q1 2022, the downtrend continued; output fell 25.95% YoY to 11,700 tonnes

2.2 Impact in Q1 2022

Production in Eastern China goes well, with only sporadic cases of COVID-19 infections.

Output of pesticide technical in East China, tonne



Sources: CCPIA and CCM



Jiangsu Province, the most productive province in China

- In Q1 2022, the output of pesticide technical saw a 0.84% YoY growth as COVID-19 pandemic eased and cross-regional traffic resumed.
- In 2022, the volume is expected to increase if adoptable measures against COVID-19 pandemic are in place.



Shandong Province

- Emerging Delta variant infections since Q2 2021 affected its production; in Q1 2022, output decreased by 23.32% YoY.



Zhejiang Province

- The spread of Delta and Omicron variants was well under control after upon April 2022.



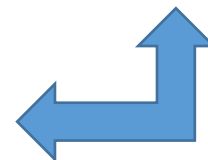
Anhui Province, an inland province of China

- In Q1 2022, the output reached 45,300 tonnes, up by 22.43% YoY;
- With the implementation of inter-regional transport permit system, easier road transport may facilitate the business of pesticide technical.

2.3 Key impact factors in different COVID-19 periods

Time	Affected regions	Regional measures	Results
Feb.–April 2020	<ul style="list-style-type: none"> Wuhan City, Hubei Province 	<ol style="list-style-type: none"> 1. Close non-essential public places and mass gathering activities; 2. Ban citywide traffic, except for transportation of necessities; 3. Bar cross-region traffic. 	<ul style="list-style-type: none"> Pesticide production was affected.
Nov. 2020	<ul style="list-style-type: none"> Hebei Province; Heilongjiang Autonomous Region 		
July 2021	<ul style="list-style-type: none"> Nanjing City, Jiangsu Province 	<ol style="list-style-type: none"> 1. City entrance and departure require : a green health QR code and travel code , as well as a 48-hour negative nucleic acid certificate; 2. Lock down entries to affected cities, such as through highway; 3. Issue temporary pass permits to designated destinations; 4. Visitors from medium/high-risk areas must fulfil 14-day centralised isolation & 7-day home quarantine. 	<ul style="list-style-type: none"> Production hindered in medium/high-risk areas Logistics challenges Slight impact upon production in low risk areas
Sept. 2021	<ul style="list-style-type: none"> Yangzhou City, Jiangsu Province 		
	<ul style="list-style-type: none"> Other regions in Jiangsu Province 		
Jan. 2022	<ul style="list-style-type: none"> Anyang City, Henan Province; Dalian City, Liaoning Province; Zhuhai & Zhongshan & Meizhou cities, Guangdong Province 	<ol style="list-style-type: none"> 1. Resumption of express services previously halted due to COVID-19; 2. Lift lockdowns of rural area; 3. Exemption from value-added tax for express enterprises in 1 May–31 Dec.; 4. Nationwide travel permits with quick application and issuance; 5. Free COVID-19 nucleic acid testing for truck drivers during transport. 	<ul style="list-style-type: none"> Traffic resumes in 23 provinces/regions in China
March 2022	<ul style="list-style-type: none"> Shenzhen Municipality; Tianjin Municipality; Changchun City, Jilin Province 		
April 2022	<ul style="list-style-type: none"> Shanghai Municipality 		

Inter-regional travel permits used nationwide



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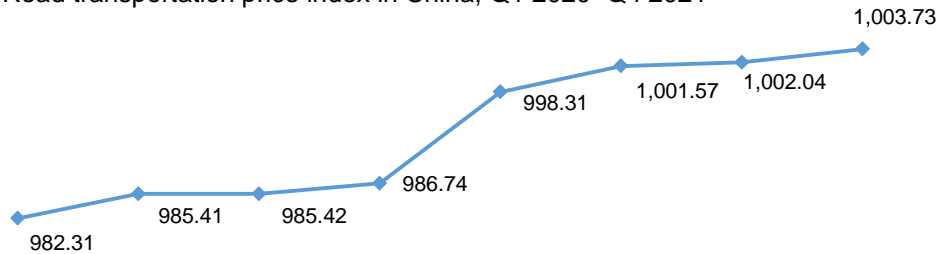
03

• Logistics and shipment •

3.1 Logistics cost

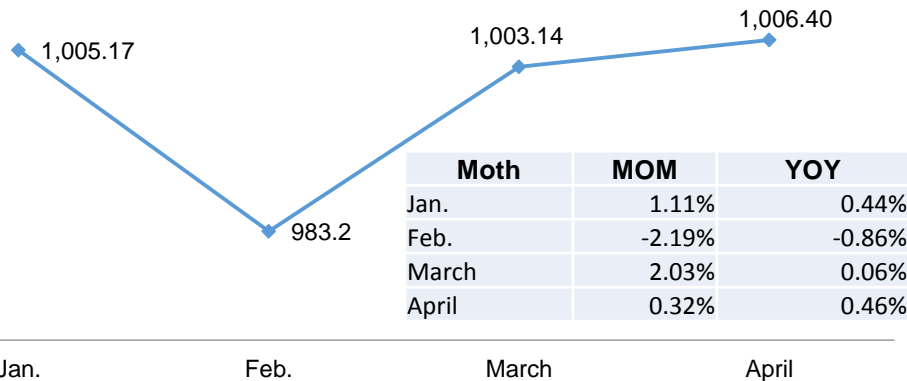
3.1.1 Domestic transportation

Road transportation price index in China, Q1 2020–Q4 2021



Q1 2020 Q2 2020 Q3 2020 Q4 2020 Q1 2021 Q2 2021 Q3 2021 Q4 2021
Sources: Ministry of Transport of the People's Republic of China

Road transportation price index in China, Jan.–April 2022



	MoM	YOY
Jan.	1.11%	0.44%
Feb.	-2.19%	-0.86%
March	2.03%	0.06%
April	0.32%	0.46%

Sources: Ministry of Transport of the People's Republic of China

Since 2020, the transportation cost in China has showed an upward trend. In 2021, the average price index of road transportation increased to about 1,000.61 from about 984.97 in 2020. The COVID-19 pandemic is one of key driving factors.

Especially in Q1 2022, though Chinese Spring Festival vocation contributed to a drop of the price index in Feb., the figure rebounded in March with a 2.03% MoM growth, and continued to increase to 1,006.40 in April.

The causal factors of the rise in transportation cost include:

- ✓ As the pandemic stroke Shanghai in Q1 2022, transportation restrictions were imposed in many regions.
- ✓ Trucks transported less goods in one journey than before under stricter transportation inspection.
- ✓ Transportation were subject to longer route/hour to destinations and drivers required a higher pay.
- ✓ Along with other unforeseeable factors.

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3.1.2 International shipment

China Containerized Freight Index (CCFI) saw a YoY increase in Q1 2022 and the cost of international shipment also surged.

In recent years, the COVID-19 pandemic further depressed the supply of containers. In Q1 2022, Shanghai Port was mostly not available to export due to the severe infection resurgence in the city. Lots of goods are transferred to Ningbo Port and Ningbo Zhoushan Port for exportation instead. The imbalance in export volumes at different ports led to a tight supply of containers and a further increase in international shipment cost.

China Containerized Freight Index(CCFI), USD/TEU

Item	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Trend
Comprehensive CCFI	919.40	853.62	901.94	1,207.62	1,960.79	2,186.54	2,994.34	3,265.79	3,449.35	
Australian region route	821.00	802.33	891.00	1,208.67	1,550.00	1,545.00	2,190.00	2,784.33	2,789.33	
Arabic region route	1,217.00	946.00	930.00	1,448.00	2,013.00	2,425.00	3,633.67	3,998.00	3,975.67	
Mediterranean region route	1,303.33	1,166.00	1,203.00	1,643.67	3,465.67	4,106.67	5,696.00	6,059.33	6,343.67	
Southeast Asia region route	752.67	716.00	640.33	928.00	1,451.00	1,293.33	1,367.67	1,701.33	2,097.33	
South Korea region route	579.00	566.33	537.67	559.33	862.33	869.33	930.67	1,088.33	1,272.33	
Eastern American region route	831.00	930.00	1,023.33	1,262.00	1,493.33	1,778.67	2,331.33	2,523.67	2,684.67	
Western American region route	712.33	738.33	925.33	1,137.00	1,333.33	1,498.33	2,061.00	2,310.33	2,601.00	
South African region route	750.00	626.67	609.00	1,137.67	1,658.67	1,871.33	2,875.00	3,550.33	3,317.00	
South American region route	680.00	525.00	529.33	1,150.00	1,857.33	1,858.33	2,458.00	2,940.67	2,637.00	
European region route	1,099.67	1,006.67	1,051.67	1,392.00	3,106.67	3,539.67	5,126.00	5,289.00	5,542.67	
Japanese region route	741.33	746.33	737.00	760.00	869.67	920.67	941.33	1,068.00	1,169.33	
Western African region route	818.67	618.00	531.67	803.00	1,476.33	1,548.33	2,051.33	2,021.33	1,910.00	

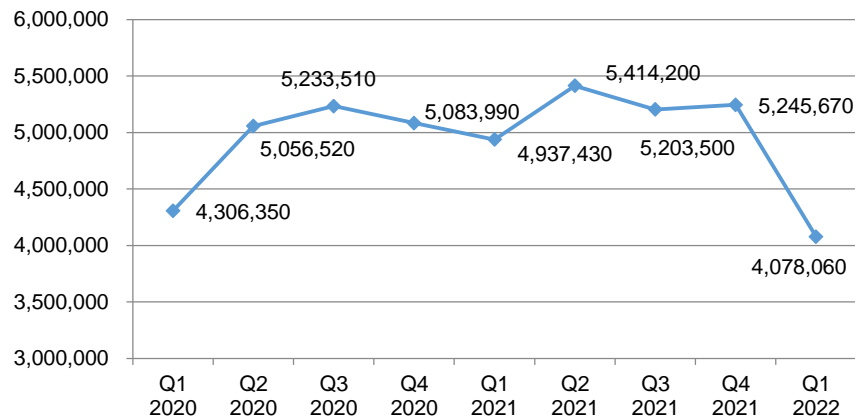
3.2 Port situation

➤ Coastal cargo throughput in key ports of China

In Q1 2022, China's coastal ports witnessed a decrease of 17.41% YOY in cargo throughput, under the spread of COVID-19 pandemic.

East China, especially Shanghai, suffered serious waves of infections; but coastal ports of Jiangsu and Shanghai still enjoyed slight increase in cargo throughput.

Total coastal cargo throughput in China, Q1 2020–Q1 2022, '000 tonnes



Sources: China Customs

Key reasons for the figure increase in Shanghai Port and Jiangsu Port:

- ✓ Shanghai Port offered many solutions for exporter, including combination transport, increasing containers and raising transportation frequency.
- ✓ The actual export demand in Shanghai Port increased in Q1 2022.
- ✓ Most agrochemical products were exported through Jiangsu Port in Q1 2022.

Coastal cargo throughput in China by region, Q1 2020–Q1 2022, '000 tonnes

Region	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q1 2022 Vs Q1 2021YOY
Zhejiang	838,240	1,084,920	1,081,050	997,100	992,520	1,130,970	1,036,720	1,044,020	800,320	-19.36%
Shandong	789,670	855,990	870,630	861,330	859,800	918,200	896,740	888,390	758,880	-11.74%
Guangdong	747,190	886,950	941,210	940,430	859,620	967,460	905,670	899,340	655,210	-23.78%
Hebei	618,210	729,170	791,510	772,910	740,520	745,180	743,990	768,380	579,680	-21.72%
Fujian	341,590	432,720	474,640	450,190	422,840	491,580	484,710	485,810	354,490	-16.16%
Liaoning	393,970	412,550	411,110	422,440	378,230	409,470	380,450	407,240	310,410	-17.93%
Guangxi	193,120	225,550	220,480	197,610	248,100	271,450	277,090	278,000	197,130	-20.54%
Jiangsu	157,220	163,340	160,390	168,000	170,680	186,280	205,000	200,570	173,660	1.75%
Shanghai	138,890	161,480	173,630	177,040	166,840	178,900	176,390	176,130	170,420	2.15%
Hainan	88,250	103,850	108,860	96,940	98,280	114,710	96,740	97,790	77,860	-20.78%
Total	4,306,350	5,056,520	5,233,510	5,083,990	4,937,430	5,414,200	5,203,500	5,245,670	4,078,060	-17.41%

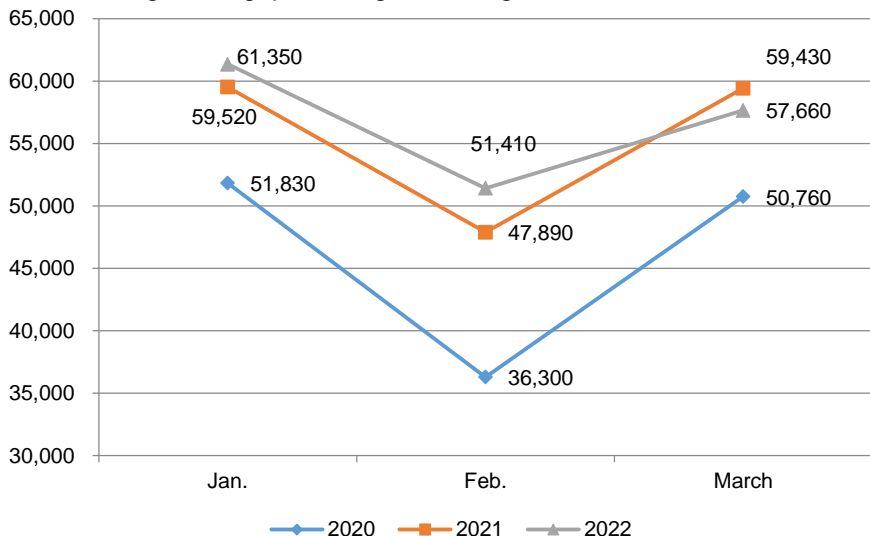
Sources: China Customs

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➤ Costal cargo throughput in Shanghai Port vs Ningbo Zhoushan Port

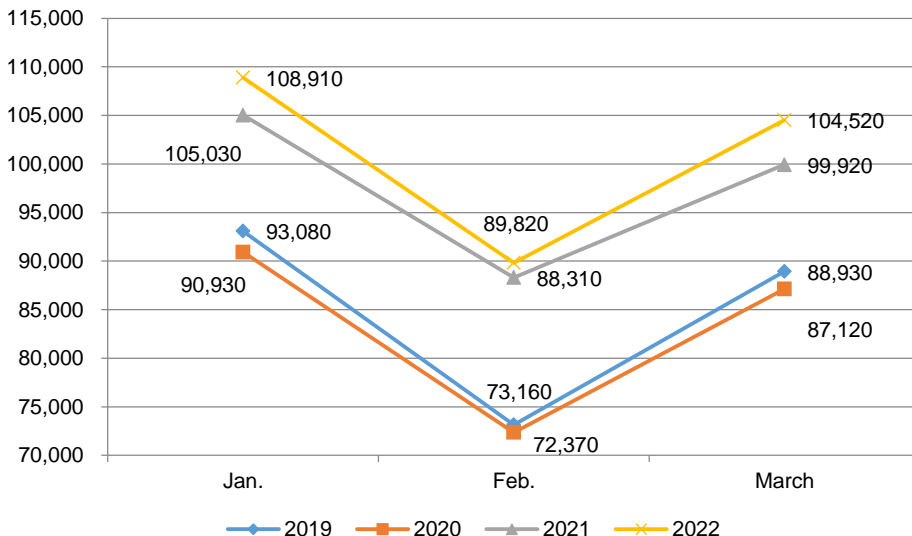
The Shanghai Port experienced a YOY decline in costal cargo throughput in March 2022, despite the many export measures taken; Ningbo Zhoushan Port achieved a YOY increase from Jan. to March 2022.

Coastal cargo throughput change in Shanghai Port, '000 tonnes



Sources: China Customs

Coastal cargo throughput change in Ningbo Zhoushan Port, '000 tonnes



Sources: China Customs

According to the survey by CCM, many pesticide suppliers have indicated that in Q1 2022 they sent out more shipments via Ningbo Zhoushan Port than via Shanghai Port which was basically inaccessible and most of parts remained half lock-downed. Some pesticide suppliers based nearby Shanghai chose not to export via Shanghai Port directly.

In addition, Feb. is a typically quiet month for coastal cargo shipping when the country is on Spring Festival break.

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➤ Inland cargo throughput in key ports of China

In Q1 2022, inland cargo throughput in China declined significantly by 15.81% YOY.

Inland cargo throughput in or near East China showed an overall downward trend in Q1 2022, due to the spreading Coronavirus cases

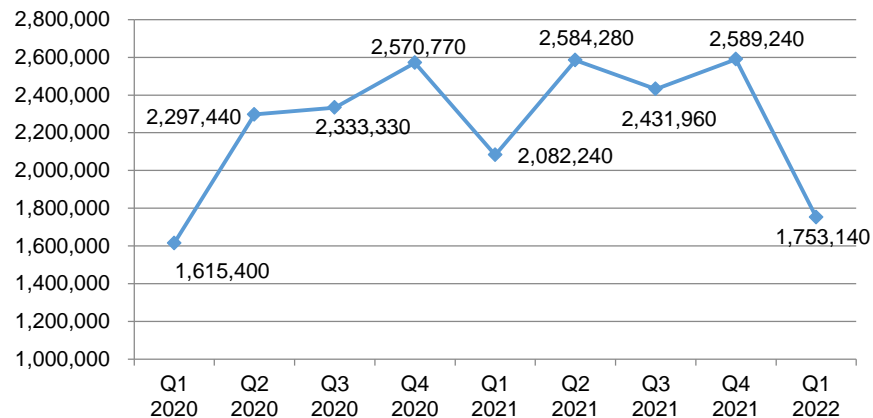
On the contrary, inland regions such as Sichuan, Henan, Yunnan and Guizhou provinces saw growths in inland cargo throughput.

Inland cargo throughput by region in China, Q1 2020–Q1 2022, '000 tonnes

Region	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021	Q4 2021	Q1 2022	Q1 2022 Vs Q1 2021YOY
Jiangsu	1,065,540	1,387,080	1,376,440	1,453,130	1,256,890	1,514,610	1,419,920	1,462,770	1,072,570	-14.66%
Hubei	100,090	167,260	215,200	277,010	205,240	259,870	225,740	285,820	190,370	-7.25%
Zhejiang	116,380	256,020	232,600	275,210	170,920	256,760	222,300	226,460	117,500	-31.25%
Guangdong	92,130	136,530	149,900	150,250	117,300	157,490	144,020	141,090	89,660	-23.56%
Jiangxi	65,130	94,200	91,830	123,920	96,070	113,040	123,010	125,970	81,160	-15.52%
Hunan	64,390	69,590	65,070	72,530	68,520	67,700	68,550	77,120	58,570	-14.52%
Guangxi	44,400	92,290	109,660	100,530	63,290	88,220	108,810	136,390	56,910	-10.08%
Chongqing	33,220	39,660	39,740	52,350	46,850	50,830	47,990	52,370	27,480	-41.34%
Shandong	18,470	28,360	28,690	38,960	27,400	35,800	32,950	35,570	23,270	-15.07%
Sichuan	6,830	7,360	6,030	6,950	10,010	8,790	8,210	13,880	14,830	48.15%
Shanghai	6,810	15,630	12,030	13,470	13,520	19,910	18,800	19,210	11,850	-12.35%
Henan	400	590	1,310	1,530	3,730	6,550	5,210	6,060	5,770	54.69%
Yunnan	1,590	1,860	2,320	2,700	2,460	2,580	2,520	4,460	3,150	28.05%
Guizhou	20	70	60	100	40	60	70	90	50	25.00%
Heilongjiang	0	940	2,450	2,130	0	2,070	3,860	1,980	0	0.00%
Total	1,615,400	2,297,440	2,333,330	2,570,770	2,082,240	2,584,280	2,431,960	2,589,240	1,753,140	-15.81%

Sources: China Customs

Total inland cargo throughput in China, Q1 2020–Q1 2022, '000 tonnes



Sources: China Customs

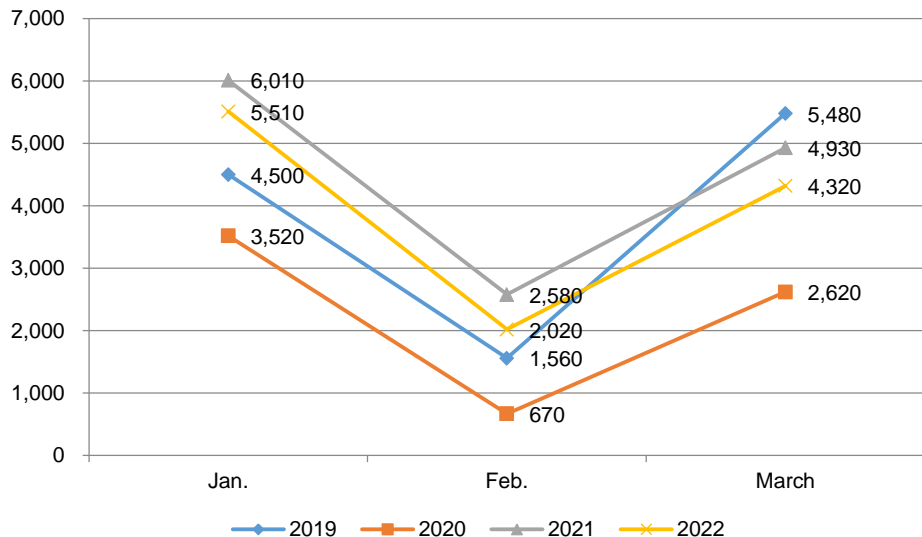
Driver for the growth in inland cargo throughput of specific regions is the switched transportation route between inland and coastal regions from road to inland waterway.

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➤ Inland cargo throughput in Shanghai Port vs Ningbo Port

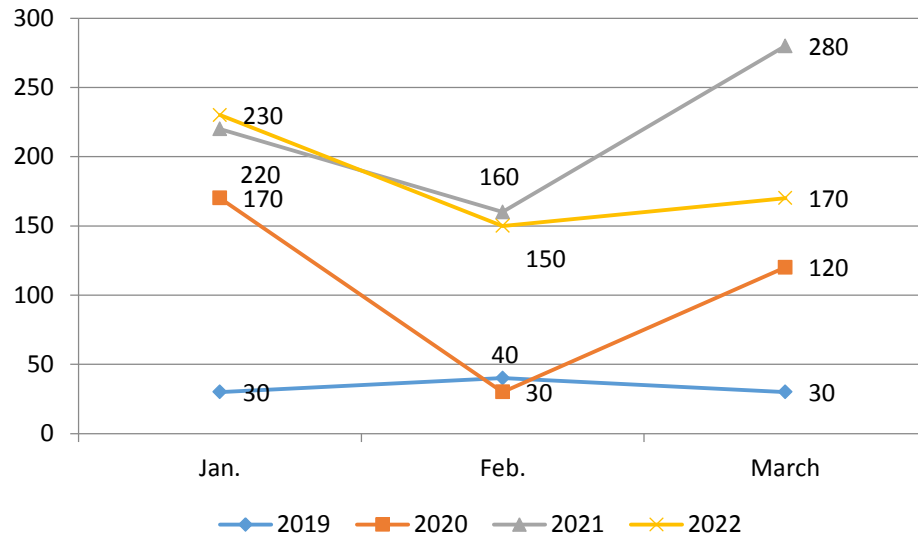
Inland cargo throughputs at both the Shanghai Port and Ningbo Port witnessed YOY downtrend in Q1 2022.

Inland cargo throughput in Shanghai Port, '000 tonnes



Sources: China Customs

Inland cargo throughput in Ningbo Port, '000 tonnes



Sources: China Customs

Noted that Feb. is a typically quiet month for coastal cargo shipping when the country is on Spring Festival break.

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3.2 Duration of logistics and shipment

Delayed by 7–10 days

Delayed by 3–7 days

Delayed by 2–7 days



Duration of domestic transportation has been extended by 7–10 days, mainly because:

- ✓ Some roads were closed and drivers had to take detours.
- ✓ Drivers or related staffs needed to conduct nucleic acid test.
- ✓ Manufacturers needed permission to travel across the region.

Duration of customs application in port is extended by at least 3–7 days mainly because,

- ✓ In Q1 2022, pesticide manufacturers in East China shipped their cargoes to Ningbo Port and Ningbo Zhoushan Port instead of Shanghai Port; many goods from East China were delayed in Ningbo Port and Ningbo Zhoushan Port.
- ✓ Pesticide manufacturers had to spend at least more three days in Ningbo Port and Ningbo Zhoushan Port for customs application in COVID-19 control period than that before.
- ✓ All related personnel are required to show negative 48-hour valid nucleic acid test and 24-hour antigen test report at port entry.

Rout	Before COVID-19, day	After COVID-19, day
Southeast Asia region rout	13	15
Australian region rout	23	28
Arabic region rout	23	28
European region rout	33	40
Western African region rout	45	50
Eastern American region rout	13	15
Western American region rout	25	28
South American region rout	35	40

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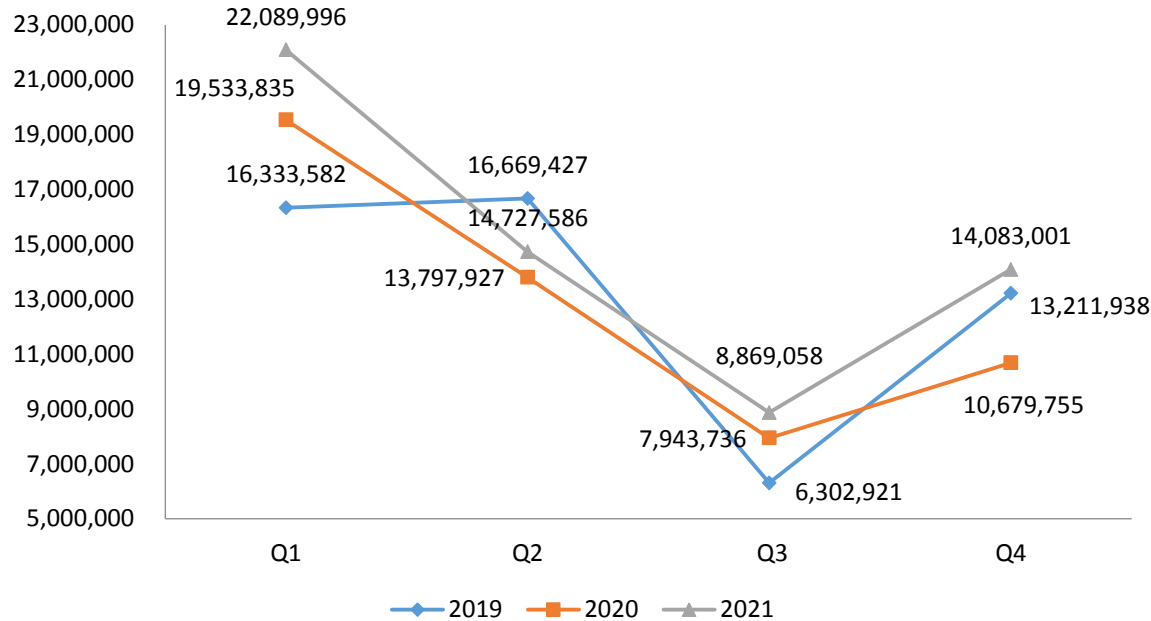
Pesticide trade

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4.1 Pesticide import

4.1.1 Import volume

Import volume of chemical pesticide in China, Q1 2019–Q4 2021, kg (based on quantity of goods)



Sources: China Customs

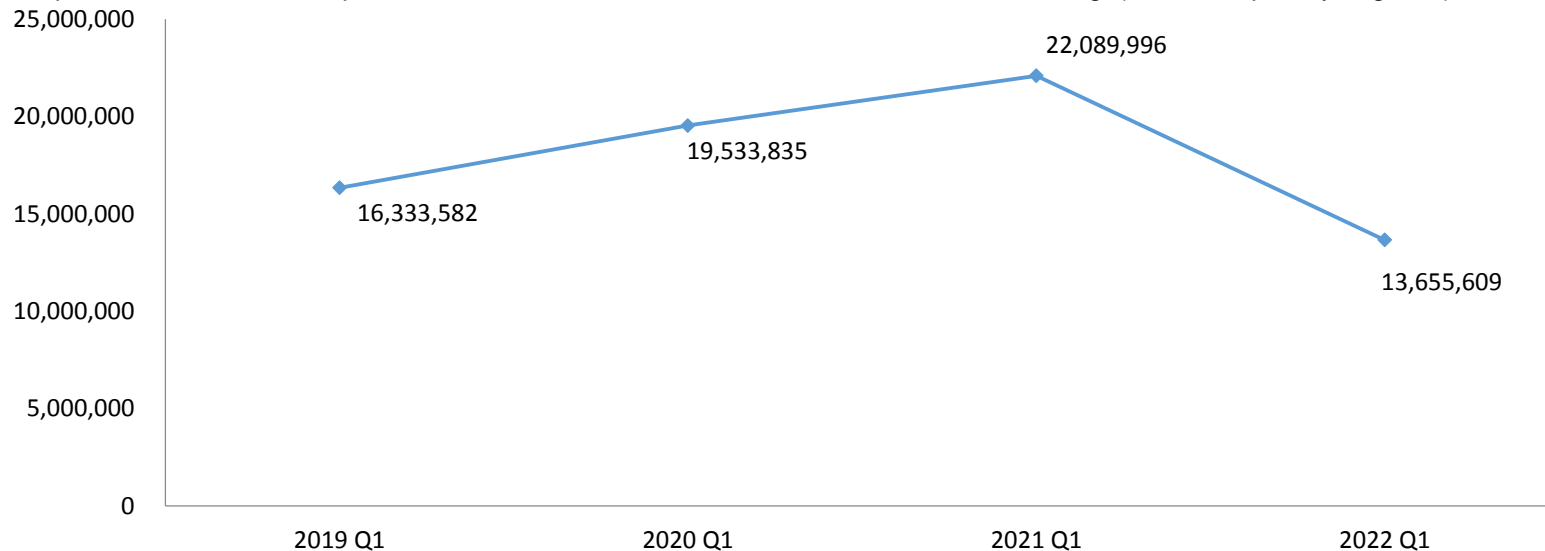
In Q2 2020, the import volume of pesticides technical decreased by 17.23% YoY. The EU and the US were China's main pesticide importers in 2020. The European Union removed the US from its safe travel list due to surging coronavirus cases in the country, and agreed on 17 March, 2020, on a coordinated temporary restriction of non-essential travel to the EU, which also hit the pesticide supply in Q2 2020.

Import volume of Chinese pesticides technical in Q2 2021 were still on a downward trend compared to Q2 2019. In April 2021, due to an outbreak of COVID-19 in India, lockdown measures were extended or re-imposed in many parts of the country. Maharashtra State, where Mumbai is located, has closed most factories since 14 April, thus reduced the supply of pesticides to China.

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4.1.1 Import volume

Import volume of chemical pesticide in China, Q1 2019, Q1 2020, Q1 2021 and Q1 2022, kg (based on quantity of goods)



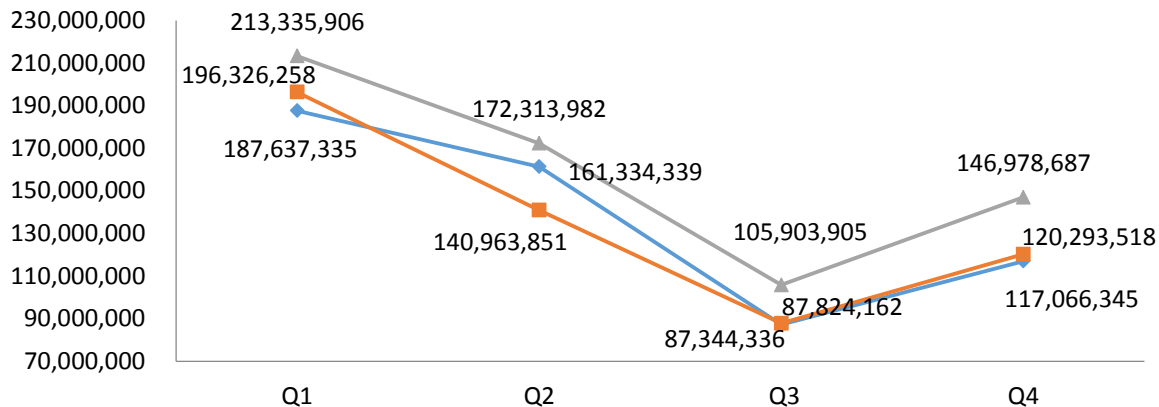
Sources: China Customs

- In Q1 2022, the import volume of pesticides technical decreased by 38.18% YoY, due to restricted logistics and increased freight fee affected by large-scale outbreak of COVID-19 in Shanghai since March.

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4.1.2 Import value

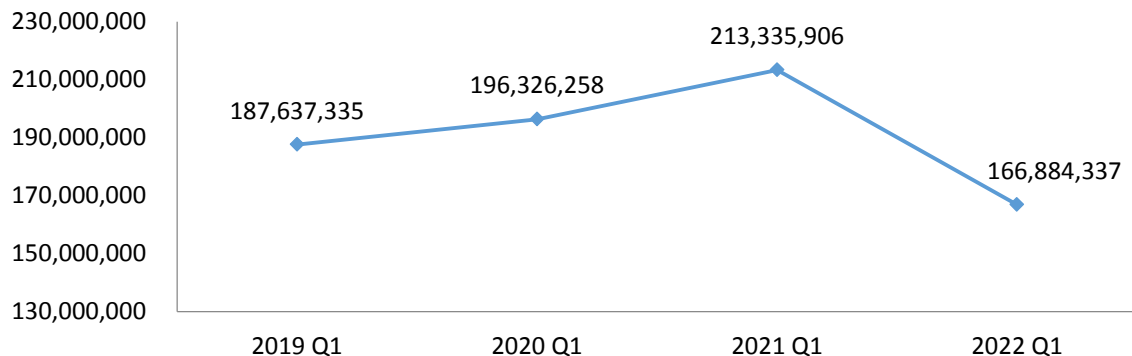
Import value of chemical pesticide AI in China, 2019–2021, USD



Sources: China Customs

2019 2020 2021

Import value of chemical pesticide AI in China, Q1 2019, Q1 2020, Q1 2021 and Q1 2022, USD



Sources: China Customs

The import value of pesticide technical decreased by 12.63% YoY in Q2 2020 but increased by 22.24% YoY in Q2 2021. One of the reasons for the increase was the low volume but high value of insecticides technical import in Q2 2021.

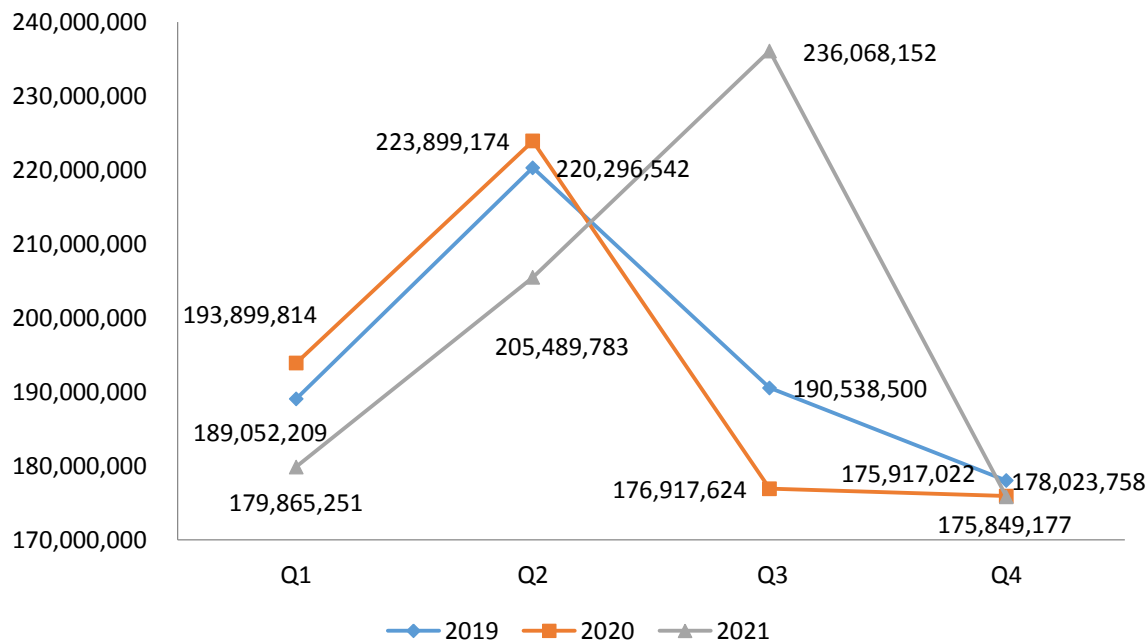
In Q1 2022, the import value of pesticide technical decreased by 21.77% YoY.

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4.2 Pesticide export

4.2.1 Export volume

Export volume of chemical pesticide AI in China, Q1 2019–Q4 2021, kg (based on quantity of goods)



Sources: Tranalysis

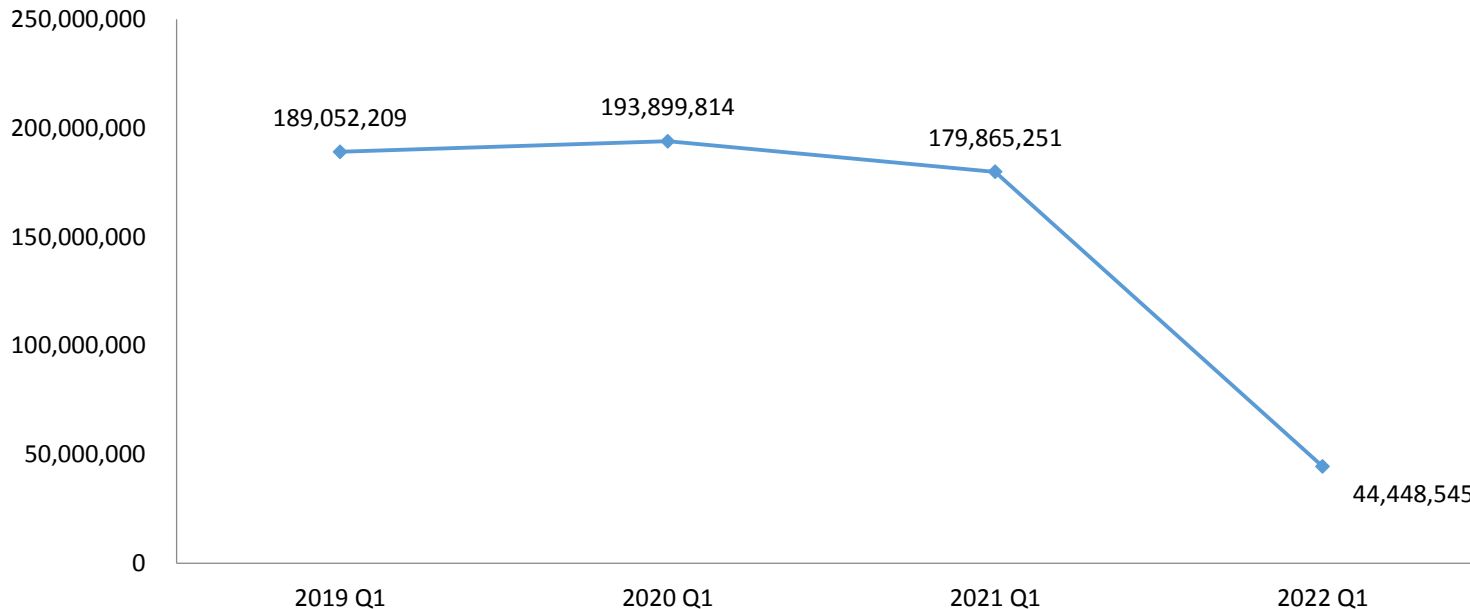
In Q3 2020, the export volume of pesticides technical decreased by 7.15% YoY. In late May 2020, Brazil's confirmed COVID-19 cases jumped, only second to the US's. Both two countries are major export destinations of pesticide technical from China. The pandemic led to falling demand for imported pesticides in Brazil and the US and delayed logistics.

In Q3 2021, the export volume of pesticides technical increased by 33.43% YoY. India is a major supplier of pesticides. The outbreak of COVID-19 in April 2021 resulted in not only the lockdowns of some parts and ports of India, but also the hindered transports and boosted freight fee, reduced labor force and delayed delivery. Part of overseas orders were since diverted to China.

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4.2.1 Export volume

Export volume of chemical pesticide AI in China, Q1 2019, Q1 2020, Q1 2021 and Q1 2022, kg (based on quantity of goods)



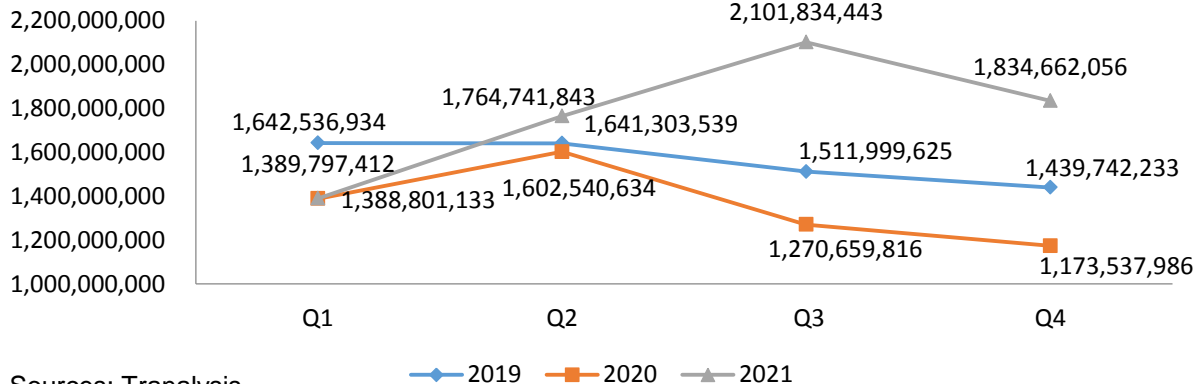
Sources: Tranalysis

In Q1 2022, the export volume of pesticides technical decreased by 75.29% YoY. Obviously, COVID-19 in Shanghai had a greater impact on the exports than imports.

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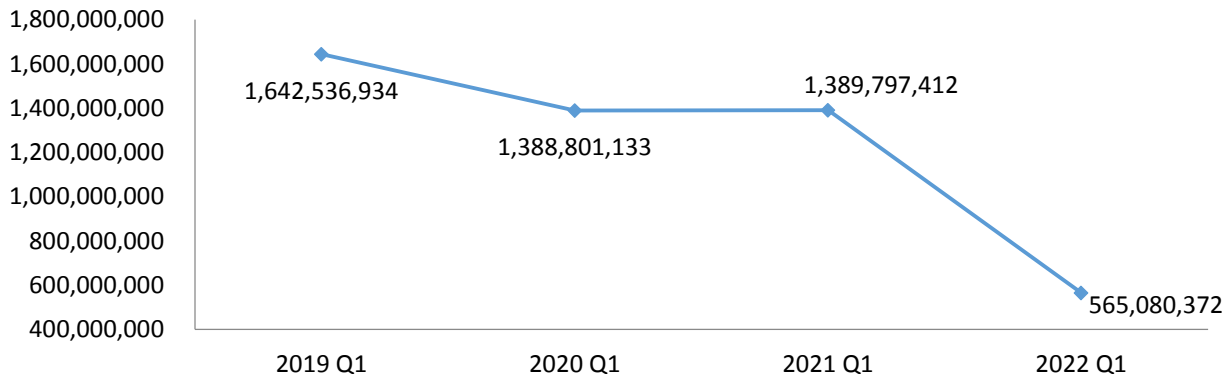
4.2.2 Export value

Export value of chemical pesticide AI in China, 2019–2021, USD



Sources: Tranalysis

Export value of chemical pesticide AI in China, Q1 2019, Q1 2020, Q1 2021 and Q1 2022, USD



Sources: Tranalysis

In Q3 2021, the export value of pesticide technical increased by 65.41% YoY. Due to overseas demand for Chinese pesticide technical increased.

In Q1 2022, the export value of pesticide technical decreased by 59.34% YoY.

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The End

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