

Production projects of China's pesticide Industry in 2023

The Second Edition

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Contents

Executive summary	1
Methodology	2
1 Overview of China's on-going pesticide projects	3
1.1 Project capacity and regional distribution.....	3
1.2 Concerning active ingredients.....	5
1.3 Construction progress	7
1.4 Product type	8
2 China's major pesticide projects	11
2.1 Large-scale projects for major active ingredients	11
2.2 Constructed projects for new capacity in 2023.....	11
2.3 Major projects for China's new pesticides and bio-pesticides.....	12
3 Details of China's on-going pesticide projects by product type.....	14
3.1 Projects involving pesticide technical only	14
3.2 Projects involving intermediates only or pesticide technical & intermediates.....	17
3.3 Projects involving pesticide formulations	20

LIST OF TABLES

Table 1.1-1 Number and capacity of projects by region, as of Oct., 2023
Table 1.1-2 Capacity of 92 projects by province/autonomous region/municipality/region, t/a
Table 1.2-1 Active ingredients involved in three or above projects, Q1–Q3 2023
Table 1.2-2 Top 10 herbicide technicals in 92 pesticide projects by capacity, Q1–Q3 2023
Table 1.2-3 Top 10 insecticide technicals in 92 pesticide projects by capacity, Q1–Q3 2023
Table 1.2-4 Top 10 fungicide technicals in 92 pesticide projects by capacity, Q1–Q3 2023
Table 1.3-1 Project progress of 92 pesticide projects in China, as of Oct., 2023
Table 1.4-1 Capacity of 92 projects by product type, Q1–Q3 2023
Table 3.1-1 31 Projects for pesticide technical only, Q1–Q3 2023
Table 3.2-1 22 Projects for pesticide intermediates only, Q1–Q3 2023
Table 3.2-2 24 Projects for pesticide technical and intermediates, Q1–Q3 2023
Table 3.3-1 15 Pesticide projects concerning formulations, Q1–Q3 2023

1. Introduction

Since late 2022, China's pesticide market has been suffering from slow consumption of technical inventory and depressed demand. In H1 2023, most fungicide varieties continued price downtrend in 2022; as of Sept., semi-reports released by multiple pesticide players had shown a commonly decreasing income, with some in the red; only a few had made positive growths in operating results. By H2, market prices of pesticides stabilised and started to tune up progressively. Against the current morass, it is worth attention how Chinese pesticide enterprises react to better adapt to the business scale and fulfill the need of long-term development.

According to public information from governments' environmental impact assessment and company announcement, totaling 92 pesticide projects pertaining to pesticide technical, formulations and intermediates were planned or constructed during Jan.–Sept. 2023, of which CCM will briefly take stock to have a closer look at China's agrochemical industry.

In this report, CCM will do overview of China's pesticide industry in 2023 from the following aspects:

- √ Overview of China's on-going pesticide projects
- √ Large-scale projects for major active ingredients
- √ Constructed projects for new capacity in 2023
- √ Major projects for China's new pesticides and bio-pesticides

2. Executive summary

In XXX–XXX, XXX, a total of XXX pesticide projects pertaining to pesticide technical, formulations and intermediates were planned or constructed by China's pesticide enterprises to better adapt to their business scale and long-term development.

In terms of project capacity by regional distribution, most scale pesticide capacity investment projects are located in Northwest, North China, East China and Central China. Among the pesticide technicals involved in the XXX Chinese pesticide projects in planning or construction progress during XXX, chlorantraniliprole, glufosinate-P and thiamethoxam are the top XXX active ingredients in terms of project amount. As of XXX, XXX of the XXX ongoing pesticide projects in China's pesticide industry in the XXX quarters are in the planning, EIA process or have received EI report approvals; meanwhile, only XXX % were under construction, trial production or have completed construction.

In China's XXX new projects that are in the planning and construction stage, XXX % of the new capacities are related to production of intermediates only, while XXX and XXX are of pesticide technical only and formulation only, respectively. Among these pesticide projects in China's pesticide industry during XXX, XXX were involving intermediates only or pesticide technical & intermediates.

3. Methodology

The report is drafted by diverse methods as follows:

- Desk research

The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, customs statistics, association seminars as well as information from the Internet.

- Internet

CCM contacted with players in the domestic agrochemical industry through B2B websites and software as well as obtained registration information on the internet.

- Data processing and presentation

The data collected and compiled are sourced from:

- CCM's database
- China Customs
- 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.

In this report, the USD/CNY exchange rate used is USD1.00=CNY7.1789 sourced from the People's Bank of China on 9 Oct., 2023.

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 Overview of China's on-going pesticide projects

1.1 Project capacity and regional distribution

In XXX, there were XXX Chinese pesticide projects in planning or construction progress, with a combined new capacity of XXX t/a, up by XXX % YoY. Among the XXX concerning projects in this issue, those projects involving pesticide technical in China are mainly located in the traditional pesticide production bases in North and East China, especially in Inner Mongolia Autonomous Region, Hebei Province and Shandong Province; those with large designed capacities for pesticide technical and the intermediates are in Gansu Province, Shandong Province and Shaanxi Province. Notably, a pesticide technical project with a designed production capacity of XXX t/a is sited overseas during the period.

East China (including Jiangsu Province, Shandong Province, Anhui Province, Jiangxi Province and Zhejiang Province) was the Top1 location with XXX projects of construction compared with the other places in China. Thereinto, XXX new projects in XXX China were designed to build capacities for pesticide technicals only. However, those production projects with higher scale of designed capacities were located in XXX Province, XXX Province and XXXX Autonomous Region, etc., targeting for the intermediates, as well as the pesticide technicals and intermediates.

Table 1.1-1 Number and capacity of projects by region, as of XXXX

No.	Location	Province/Autonomous region/Municipality/Region	Total new capacity, t/a	Number of project
1	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX

Source: CCM

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1.2 Concerning active ingredients

According to the XXX Chinese pesticide projects in planning or construction progress in XXX, the top 3 pesticide technicals in terms of project amount are XXX (XXX), XXX (XXX) and XXX (XXX).

Table 1.2-1 Active ingredients involved in three or above projects, XXXX

No.	Concerning products	Number of project	Ranking	Category
1	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX
XX	XXX	XXX	XXX	XXX

Source: CCM

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1.3 Construction progress

In XXX, there are XXX ongoing pesticide projects in China's pesticide industry which can be broken down by progress. As XXX, most of ongoing pesticide projects in China's pesticide industry (XXX, = XXX % of the total) have been planned, XXX of which was in EIA process or with EI report approved; the rest (XXX, = XXX % of the total) were under construction, in trial production or with construction completed and put into operation.

Table 1.3-1 Project progress of XXX pesticide projects in China, as of XXXX

No.	Status	Pesticide technical	Pesticide technical & intermediates	Pesticide intermediates	Pesticide technical & formulations	XXX	Total
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX
	XXX	XXX	XXX	XXX	XXX	XXX	XXX
	XXX	XXX	XXX	XXX	XXX	XXX	XXX

No.	Status	Pesticide technical	Pesticide technical & intermediates	Pesticide intermediates	Pesticide technical & formulations	XXX	Total
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX
		XXX	XXX	XXX	XXX	XXX	XXX
		XXX	XXX	XXX	XXX	XXX	XXX
Total		XXX	XXX	XXX	XXX	XXX	XXX

Note: EIA refers to environmental impact assessment; EI report refers to environmental impact report.

Source: CCM

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2 China's major pesticide projects

2.1 Large-scale projects for major active ingredients

In the XXX Chinese pesticide projects planned or constructed during XXX, active ingredients, such as mancozeb, clethodim, glyphosate and 2,4-D, were involved in projects with large production capacities. Notably, glufosinate-ammonium and glufosinate-P had enjoyed the same popularity as previous years, featuring both scale capacity and large project amount. As of XXX, concerning large-scale projects for the above-mentioned pesticide technicals are under planning or construction and yet to put into operation, with details of some major ones as below:

- Mancozeb and Clethodim:** On XXX, the recordation certificate of Inner Mongolia Miraculous Crop Science Co., Ltd.'s XXX t/a clethodim project and XXX t/a mancozeb project were publicised. With clethodim's investment totalling USD XXX million (RMB XXX million) and that of mancozeb was USD XXX million (RMB XXX million). Both projects will be constructed in the Bayin Aobao (Bayan Owoo) Industrial Park, Alxa High-Tech Industrial Development Zone, Alxa League, Inner Mongolia Autonomous Region. Inner Mongolia Miraculous is a subsidiary of Lianyungang Liben Crop Science Co., Ltd.

- Glyphosate:**

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- Glufosinate-ammonium:**

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3 Details of China's on-going pesticide projects by product type

3.1 Projects involving pesticide technical only

In XXX, Chinese pesticide enterprises had continued to cultivate high-quality projects in their sectors and beefed up capacity development for products in short supply. In this connection, multiple thousand-tonne projects were invested and constructed in a row, including XXX technical-only projects, which accounted for 33.7% of the total 92 projects in the period, with following regional distribution:

- XXX in XXX China;
- XXX in XXX China, of which the construction scale larger than technical projects in other regions;;

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Table 3.1-1 31 Projects for pesticide technical only, Q1–Q3 2023

No.	Enterprise name	Project name	Concerning products	New capacity, t/a	Total capacity, t/a	Status
1	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX
XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM

3.2 Projects involving intermediates only or pesticide technical & intermediates

In China, agrochemical enterprises are urgently intensifying industrial layout for key supporting intermediates, attempting to further enhance the industrial chain integration for the company's pivotal products. Among the XXX planned or constructed pesticide projects during XXX, a total of XXX projects with a capacity of XXX t/a were designed for intermediates only (XXX,= XXX t/a) or a combination of pesticide & intermediates (XXX,= XXX t/a). Thereinto, XXX t/a (=XXX) is located in the Northwestern China.

Table 3.2-1 22 Projects for pesticide intermediates only, Q1–Q3 2023

No.	Name of Enterprise	Project name	New capacity	Status	Category of concerning products
1	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX	XXX
7	XXX	XXX	XXX	XXX	XXX

Note: EIA refers to environmental impact assessment; EI report refers to environmental impact report; New capacities for projects in Phase II are based on those constructed in Phase II, others are based on total new capacities.

Source: CCM

Table 3.2-2 24 Projects for pesticide technical and intermediates, Q1–Q3 2023

No.	Name of Enterprise	Project name	New capacity	Status	Category of concerning products
1	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX	XXX
7	XXX	XXX	XXX	XXX	XXX

Note: EIA refers to environmental impact assessment; EI report refers to environmental impact report; New capacities for projects in Phase II are based on those constructed in Phase II, others are based on total new capacities.

Source: CCM

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