CCM Data & Business Intelligence

Survey of Metolachlor in China

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1. Introduction

This report presents an overview of China's supply and demand of metolachlor which is a selective herbicide, as well as forecast on the future trends.

Metolachlor is featured by broad weeding spectrum, high effectiveness and wide applications. During 2016–2021, the capacity and output saw some volatility. It is noteworthy that the pressure from environmental protection has been heavy in China in recent years. As a result, some metolachlor producers had to suspend production from time to time.

What's the detailed development situation of the industry? What are the driving factors and barriers? How will the industry go in the future years? This report will illustrate the details for readers through the following aspects:

- Product registration under the Institute for Control of Agrochemicals, Ministry of Agriculture and Rural Affairs, as of March 2022
- Production situation (capacity, output and key producers), 2016–2021
- Prices of metolachlor technical by month and year, 2016–2021
- Export analysis, 2016–H1 2021
- Domestic consumption, 2016–2021
- Forecast on supply and demand, 2022–2026

2. Approach for this report

This report is drafted by diverse methods as follows:

(1) Desk research
The sources of desk research are various, including published journals, government statistics, industrial statistics, Customs statistics, as well as information from the Internet. Obtained information has been compiled and analysed. When necessary, checks will be made with Chinese metolachlor suppliers regarding market information such as key producers, production and price trend, etc.

(2) Telephone interview
Extensive telephone interviews have been carried out in order to grasp the actual market situation of metolachlor in China.

Interviewees cover:
- Producers
- Traders

(3) Internet
CCM contacted with the players in this industry through B2B websites and software.

Data processing and presentation

The data collected and compiled were sourced from:

a. Published articles from periodicals, magazines and journals
b. Statistics from governments and international institutes
c. Telephone interviews with domestic suppliers, traders, industrial experts
d. Third-party data providers
e. Information from the Internet

Data obtained 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 made in order to analyse the data and have conclusions drawn.

3. Executive summary

Metolachlor is a selective herbicide with broad weeding spectrum, high effectiveness and wide application fields. According to statistics from the Institute for the Control of Agrochemicals, Ministry of Agriculture and Rural Affairs of the People's Republic of China (ICAMA), as of March 2021, a total of XXXX valid registrations of metolachlor have been licensed in China, including XXXX for technical, XXXX for single formulations and XXXX for mixed formulations.

The capacity of metolachlor technical increased from XXXX t/a in 2016 to XXXX t/a in 2018, yet dipped to XXXX t/a during 2019–2020 and increased to XXXX in 2021. The output of XXXX technical peaked at XXXX tonnes in 2017 but XXXX to about XXXX tonnes in 2021.

Metolachlor products made in China are export-oriented. In 2016–2018, the share of annual export volume of metolachlor (calculated by 97% technical, the same below) against the national total output XXXX continuously, reaching XXXX % in 2018. The share XXXX to slightly over XXXX % in 2019, but XXXX strongly in 2020.

In 2016–2018, prices of both metolachlor technical and metolachlor formulations were on a general increase. Specifically, the annual average ex-works price of 97% metolachlor technical XXXX from USDXXXX/t in 2016 to USDXXXX/t in 2018. In 2019, the annual ex-works price of 97% metolachlor technical decreased to USDXXXX/t, XXXX by about XXXX% year on year. And it XXXX further to USDXXXX/t in 2020. The annual ex-works price XXXX to about USDXXXX/t in 2021, and the market saw XXXX prices.

In China, metolachlor technical is applied on crops through single formulations of 720g/L EC and 960g/L EC and mixtures of the product with bensulfuron-methyl, atrazine and mefenacet. And metolachlor is mainly applied on corn, vegetables, soybean and some other cash crops in China. In 2021, the consumption volume of metolachlor technical in China reached XXXX tonnes, up XXXX% year on year. The consumption of metolachlor technical in corn and vegetables accounted for more than XXXX% of the total consumption in China.

With increasing demand and some barriers to a jump in metolachlor supply in China, it is predicted that the output of metolachlor technical in China will increase in the next four years and then decrease in 2026. It's unlikely to see too much increase in both supply and demand in China during 2022–2026.

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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3.2 Production of metolachlor in China, 2016–2021

The capacity of metolachlor technical increased from XXXX t/a in 2016 to XXXX t/a in 2018, yet dipped to XXXX t/a during 2019–2020 and increased to XXXX in 2021. The output of XXXX technical peaked at XXXX tonnes in 2017 but XXXX to about XXXX tonnes in 2021.

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Table 3.2-1 Capacity and output of major metolachlor technical producers in China, 2016–2021

No.	Producer	Location	Status, as of March 2022	2021		2020		2019		2018		2017		2016	
				Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne
1	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
2	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
3	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
4	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
5	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX

Source: CCM

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5 Consumption, 2016–2021

In 2021, the consumption volume of metolachlor technical in China has edged higher to XXXX tonnes, with a growth rate of about XXXX% compared with that in 2020. Years before, 2015 witnessed a large decrease in domestic consumption, which is mainly attributed to implementation of policies on reducing pesticides use in China and strong competition from S-metolachlor.

As a substitute of acetochlor in crop planting, metolachlor is becoming popular in China at present due to its relatively safer properties. That has driven up the domestic consumption of metolachlor technical in China since 2017. But it's worthy to note that S-metolachlor, a strong competing product for metolachlor, though at higher price, has better performance and becomes popular among planters in China.

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Table 5-1 Application of metolachlor technical in China by crop, 2021

Crops	Consumption volume, tonne
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
Total	**XXXX**

Source: CCM

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