

# Top 100 Pesticide Enterprises in China

The Eighth Edition

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**Researched & Prepared by:**

**Kcomber Inc.**

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## 1. Introduction

2021 continued a strong growth momentum of agricultural chemical market that has been seen for recent decade. Amidst the COVID-19 period, numbers of overseas orders flooded in China and there was a spike in electricity consumption which collided with the central government's carbon neutrality pledge and policies to control energy consumption & intensity by power rationing and production restriction. These factors along with raw materials' rises somehow led supply shortfalls and sent the pesticide prices high. In addition, China gave the top priority for healthy development of the pesticide industry.

Chinese pesticide enterprises have started to relocate their production operation since the end of 2018. Inner Mongolia Autonomous Region, Gansu Province, Ningxia Hui Autonomous Region come along as the major destinations of such relocations to the central and western regions. In 2021, both total revenue and the entry threshold of top 100 pesticide/formulation producers have increased from last year's records. Moreover, the lists indicate increased industry concentration as the sales of the top 10 accounted for about 40% of the total.

Along with intensified competition within the industry and rigorous enforcement of environmental protection measures, China's pesticide industry has entered a new round of integration with increasing number of M&A deals settled in the year, to boost adaptability to the ever changing environment and improve technology, product quality and innovation, business services, etc.

In this report, CCM will do analysis of Top 100 Pesticide Enterprises in China from the following aspects:

- √ Review of the pesticide industry focus in 2021
- √ Top crop protection brands in China in 2021
- √ Overview of 2022 China Top 100 Pesticide Enterprises
- √ 2022 Top Pesticide Enterprises in China
- √ 2022 Top Pesticide Formulation Enterprises in China

## 2. Approach for this report

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. A lot of work has gone into the compilation and analysis of the obtained information. When necessary, checks have been made with Chinese agrochemical players.

### - Internet

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

### - Data processing and presentation

The data collected and compiled are sourced from:

- China Crop Protection Industry Association
- CCM's database
- 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.

### - Unit

USD: US dollar, currency unit in the US

RMB: currency unit in China, also named Renminbi

Tonne: ton, equals to metric ton in this report

/t: per tonne

t/a: tonne per year, tonne/annum

## Table Abbreviations and full names

*Source: The People's Bank of China*

### 3. Executive summary

On XX July, China disclosed the XXXX top XXX enterprise lists based on the overall sales performance of pesticide enterprises in XXXX. In general, both total revenue and the entry threshold of top XXX pesticide and formulation producers have increased from last year's records. Moreover, the lists indicate increased industry concentration as the sales of the top XX accounted for about XX% of the total.

Regarding the geographical distribution of the XXXX China top XXX pesticide enterprises, the top three provinces Jiangsu, Hubei and Shandong account for XX.XX% of the total pesticide revenue in XXXX. Of pesticide formulations, sales in the top XXX rise XX.XX% year on year in XXXX, with Shenzhen Noposion Agrochemicals Co., Ltd., Jiangxi Zhengbang Crop Protection Co., Ltd., Guangxi Tianyuan Biochemistry Co., Ltd. and Jiangsu Rotam Chemistry Co., Ltd., being the top X.

China's pesticide industry has resumed stable production of pesticide technical gradually over the past two years, and the output of chemical pesticide technical in XXXX showed a year-on-year increase of XX.XX%, out of the COVID-XX outbreak concerns to some extent. In XXXX, as the global epidemic situation elevated, China's control on waves of infections was a success in general which helped grow the country's imports and exports of pesticides, herbicides particularly.

#### 4. What is in the report?

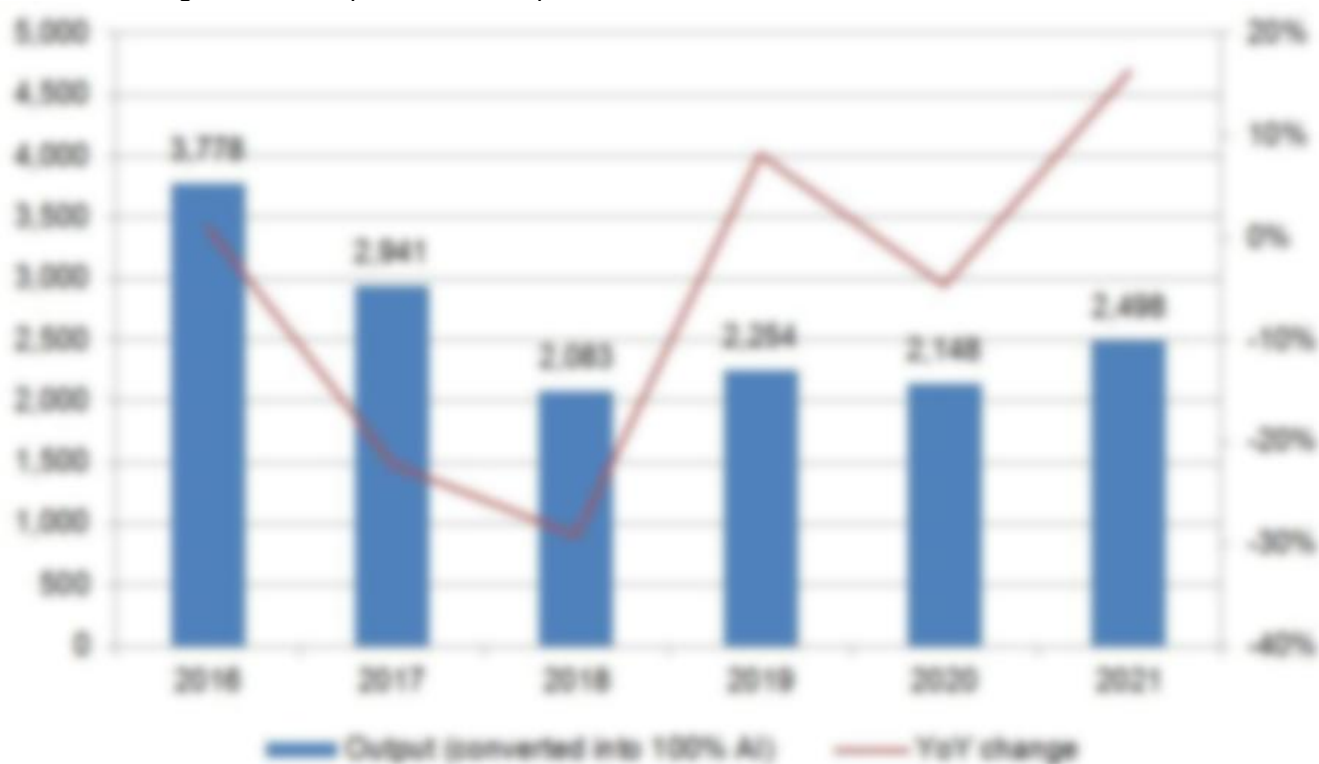
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#### 1.1 General situation of China's pesticide industry in 2021

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Figure 1.1-1 Output of chemical pesticide technical in China in 2016-2021, '000 tonnes



Source: National Bureau of Statistics (NBS) and CCM

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Figure 1.1-2 Geographical distribution of output of chemical pesticide technical (converted into 100% AI) in China, 2021



Source: NBS and CCM

...

## 1.2 Imports and exports of pesticide technical in 2021

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Table 1.2-1 Export volume and value of chemical pesticide in China, 2021 vs 2020

| Category        | Export volume, '000 tonnes |      |        | Export value, million USD |       |        |
|-----------------|----------------------------|------|--------|---------------------------|-------|--------|
|                 | 2021                       | 2020 | Trend  | 2021                      | 2020  | Trend  |
| XXXXXXXXXX      | XXX                        | XXX  | XXXXX  | XXXXX                     | XXXXX | XXXXXX |
| X XXXXXXXXXXX   | XXX                        | XXX  | XXXXX  | XXXXX                     | XXXXX | XXXXXX |
| X XXXXXXXXXXXXX | XX                         | XX   | XXXXXX | XXXXX                     | XXXXX | XXXXX  |
| X XXXXXXXXXXX   | XX                         | XX   | XXXXX  | XXX                       | XXX   | XXXXX  |

Source:Tranalysis

...

Table 1.2-2 Import volume and value of chemical pesticide in China, 2021 vs 2020

| Category        | Import volume, '000 tonne |      |        | Import value, million USD |      |        |
|-----------------|---------------------------|------|--------|---------------------------|------|--------|
|                 | 2021                      | 2020 | Trend  | 2021                      | 2020 | Trend  |
| XXXXXXXXXX      | XX                        | XX   | XXXXXX | XXX                       | XXX  | XXXXXX |
| X XXXXXXXXXXX   | XX                        | XX   | XXXXXX | XXX                       | XX   | XXXXXX |
| X XXXXXXXXXXXXX | XX                        | XX   | XXXXXX | XXX                       | XXX  | XXXXXX |
| X XXXXXXXXXXX   | XX                        | XX   | XXXXXX | XXX                       | XXX  | XXXXXX |

Source:Tranalysis

...

## 2.1 Top crop protection brands in China in 2021

...

Table 2.1-1 List of 2021 China Crop Protection Popular Fungicide Brands

| No. | Enterprise                      | Product                          | Brand  |
|-----|---------------------------------|----------------------------------|--------|
| X   | XXXXXXXX XXXXX XXXXXXXXXXX XXXX | Pyraclostrobin·Prochloraz XXX XX | XXXXXX |

|    |                                                   |                                                    |                     |
|----|---------------------------------------------------|----------------------------------------------------|---------------------|
|    | XXXX                                              |                                                    |                     |
| X  | XXXXXXXX XXXXXX XXXXXXXXXXX<br>XXXX XXXX          | Difenoconazole·Propiconazole XXXXXX XX             | XXXXXX              |
| X  | XXXXXXXX XXXXXX XXXXXXXXXXX<br>XXXX XXXX          | XXXXXXXXXXXX XXXXXX XXX XX                         | XXXX XXXXX          |
| X  | XXXXX XXXXX XXXXXXXXXXX XXXX<br>XXXX              | XXXXXXXXXXXXXXXX XXX XX                            | XXXXXXXXXX          |
| X  | XXXXXXXX XXXXXX XXXXXXXXXXX<br>XXXX XXXX          | Propiconazole·Azoxystrobin XXXXX XX                | XXXXXXX             |
| X  | XXXX XXXXXXX XXXX XXXX                            | Mefentrifluconazole·Pyraclostrobin XXXXXX XX       | XXXXXXX<br>XXXXXXXX |
| X  | XXXXXXXX XXXXXXXXXXX XXXX XXXX                    | XXXXXXXXXXXXXXXXXXXX XXX XX                        | XXXXX               |
| X  | XXXXX XXXXXXX XXXX XXXX                           | XXXXXXXX XXX XX                                    | XXXXX XXXXXXX       |
| X  | XXXXXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX XXXX        | Pyraclostrobin·Tebuconazole XXX XX                 | XXXX                |
| XX | XXXXXXXX XXXXXXX XXXXXXX<br>XXXXXXXX XXXX XXXX    | Tebuconazole·Phenamacril XXXXXX XX                 | XXXXXXX             |
| XX | XXXXX XXXXXXX XXXXXXX XXXX<br>XXXX                | Pyraclostrobin·Metiram XXX XX                      | XXXXXXXX<br>XXXXX   |
| XX | XXXXX XXXXXXX XXXXXXXXXXX<br>XXXXXXXX XXXX XXXX   | XXXXXXXXXXXX XXX XX                                | XXXXXX              |
| XX | XXXXXXXX XXXXXXXXXXX XXXX<br>XXXX XXXXXXX XXXXXXX | XXXXXXXX XXX XX                                    | XXXX                |
| XX | XXXXXXXX XXXXXXXXXXX<br>XXXXXXXX XXXX XXXX        | Famoxadone·Oxathiapiprolin XXX XX                  | XXXXXXXX<br>XXXXXX  |
| XX | XXXXXXXX XXXXXXX XXXXXXX XXXX<br>XXXX             | Difenoconazole·Fludioxonil·Thiamethoxam XXX<br>XXX | XXXXXXX             |
| XX | XXXXXXXX XXXX XXXXXXX XXXX<br>XXXX                | XXXXXXXX XXX XX                                    | XXXXXXX             |
| XX | XXXXXXXX XXXXXXX XXXXXXXs<br>XXXX XXXX            | XXXXXXXXXXXX XXXXXX XX                             | XXXXXX              |
| XX | XXXXXXXX XXXXXXX XXXXXXX XXXX<br>XXXX             | Metalaxyl-M·Fludioxonil·Azoxystrobin XXX XXX       | XXXXXX XXXX         |
| XX | XXXXXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX XXXX        | Pyraclostrobin·Epoxiconazole XXX XX                | XXXXXXXX            |

|    |                                                           |                                                  |         |
|----|-----------------------------------------------------------|--------------------------------------------------|---------|
| XX | XXXXXXXXXXXXXXXXXXXXXXXXXXXX<br>XXXX XXXX                 | XXXXXXXXXXXX hydrochloride·Metalaxyl-M XXX<br>XX | XXXXXX  |
| XX | XXXXXXXXXXXXXXXXXXXXXXXXXXXX<br>XXXXXXXXXXXXXXXXXXXX XXXX | Pyraclostrobin·Fluopimomide XXX XX               | XXXXXXX |

Note:1. The product "Flumorph 30% SC" is registered by Shenyang Sciencreat Chemicals Co., Ltd., a subsidiary of Sinochem International Crop Care Company Limited.

2. The product "Pyraclostrobin·Fluopimomide 30% ZC" is registered by Shandong United Pesticide Industry Co., Ltd., a subsidiary of Shandong Sino-Agri United Biotechnology Co., Ltd.

Source:CCPIA & CCM

Table 2.1-2 List of 2021 China Crop Protection Popular Plant Growth Regulator Brands

| No. | Enterprise                                                     | Product                                                                                      | Brand                        |
|-----|----------------------------------------------------------------|----------------------------------------------------------------------------------------------|------------------------------|
| X   | XXXXXXXXXXXXXXXXXXXXXXXXXXXX<br>XXXX                           | Thidiazuron-Diuron XXXXXX XX                                                                 | XXXXXXXX<br>XXXXXXXXXXXXXXXX |
| X   | XXXXXXXX XXXXXXXXXXXXXXXXXXXX<br>XXXX XXXX                     | XXXXXXXXXXXX XXXX XX XX                                                                      | XXXXXXX                      |
| X   | XXXXXXXXXXXXXXXXXXXX XXXX XXXX                                 | XXXXXXXXXXXXXXXXXXXX<br>XXXXXXXXXXXXXXXXXXXX XXXX XX                                         | XXXXXXXXXXXX                 |
| X   | XXXXXXXXXXXXXXXXXXXX XXXX<br>XXXXXXXXXXXX XXXX XXXX            | XXXXXXX nitrophenolate·Diethyl<br>XXXXXXXXXXXX XXXXXXXXXXXX XX XX                            | XXXXXXX                      |
| X   | XXXXXXXXXXXXXXXXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX XXXX         | XXXXXXXXXXXXXXXXXXXX XXX XX                                                                  | XXXXXXX                      |
| X   | XXXXX XXXXXXXXXXXXXXX XXXXXXX XXXX XXXX                        | XXXXXXXXXXXXXXXXXXXX<br>brassinosteroid·Indol-3-ylacetic<br>acid·Gibberellic XXXX XXXXXXX XX | XXXXX                        |
| X   | XXXXXXXXXXXXXXXXXXXX XXXX XXXX                                 | XXXXXXXXXXXX XXX XX                                                                          | XXXXXXX                      |
| X   | XXXXXX XXXXXXXXXXXXXXXXXXXX<br>XXXX XXXX                       | XXXXXXXXXXXXXXXXXXXX calcium·Uniconazole<br>XXX XX                                           | XXXXXXXXXXXX                 |
| X   | XXXXXXXXXXXX XXXXXXX XXXXXXX XXXXXXX<br>XXXX XXXXXXX XXXX XXXX | XXXXXXXXXXXX XXX XX                                                                          | XXXXXXX                      |
| XX  | XXXXXXXXXXXXXXXXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX Ltd.         | XXXXXXX XXXX XX XX                                                                           | XXXXXXXXXXXX XXXXXXX         |

Note:1. The product "14-Hydroxylated brassinosteroid·Indol-3-ylacetic acid·Gibberellic acid 0.136% WP" is registered by Pilarquim (Jiangsu) Co., Ltd., a subsidiary of Pilar (Shanghai) Biotech Co., Ltd.

2. The product "Ethephon 40% SL" is registered by Jiangsu Corechem Co.,Ltd., a subsidiary of Zhejiang Corechem Co.,Ltd.

3. The product "Sodium 4-CPA 8% SP" is registered by Sichuan Runer Technology Co.,Ltd., a subsidiary of Sichuan Guoguang Agricultural Materials Co., Ltd.

Source:CCPIA & CCM

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### 3.1 China's Top 100 Pesticide Enterprises

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Table 3.1-1 List of 2022 China Top 100 Pesticide Enterprises

| No. | Enterprise                                                      | XXXXXXXXXX<br>revenue in 2021,<br>million RMB | XXXXXXXXXX<br>revenue in 2021,<br>million USD | YoY Change      |                 | Ranking<br>in 2021 | Ranking<br>change |
|-----|-----------------------------------------------------------------|-----------------------------------------------|-----------------------------------------------|-----------------|-----------------|--------------------|-------------------|
|     |                                                                 |                                               |                                               | based on<br>RMB | based on<br>USD |                    |                   |
| X   | XXXXX XXXX                                                      | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | X                 |
| X   | XXXXXXXXXX XXXXXXXX<br>XXXXXXXXXX XXXX<br>XXXX                  | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | X                 |
| X   | XXXXXXXXXX XXXXXXXX<br>XXXXXXXXXX XXXXXXXX<br>XXXX XXXX         | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | X                 |
| X   | XXXXXXXXXX XXXXXXXX<br>XXXXXXXXXX XXXX<br>XXXX                  | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | X                 |
| X   | XXXXXXXXXX XXXXX<br>XXXXXXXXXX<br>XXXXXXXXXX XXXXX<br>XXXX XXXX | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | X                 |
| X   | XXXXXXXXXX XXXXX<br>XXXX XXXXXXXX XXXX<br>XXXX                  | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | X                 |
| X   | XXXXXX XXXXXXXX<br>XXXXXXXXXX XXXXX<br>XXXX XXXX                | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | X                 |
| X   | XXXXXXXXXX XXXX<br>XXXX                                         | XXXXXX                                        | XXXXXX                                        | XXXXXX          | XXXXXX          | X                  | XX                |

|    |                                                                   |       |       |          |          |    |    |
|----|-------------------------------------------------------------------|-------|-------|----------|----------|----|----|
| X  | XXXXX XXXXXX<br>XXXXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX     | XXXXX | XXXXX | XXXXXXXX | XXXXXXXX | XX | X  |
| XX | XXXX XXXXXXXX<br>XXXX XXXX                                        | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | X  | XX |
| XX | XXXXXXXX XXXXXX<br>XXXXXXXXXXXXXXXX<br>XXXX XXXX                  | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | X  |
| XX | XXXXXXXX XXX XXX<br>XXXX XXXX                                     | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | XX |
| XX | XXXXXXXX<br>XXXXXXXXXXXXXXXX<br>XXXXX XXXXXXXX<br>XXXX XXXX       | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | XX |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                    | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | X  |
| XX | XXXXXX XXXXX XXXX<br>XXXX                                         | XXXXX | XXX   | XXXXXX   | XXXXXXXX | XX | XX |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXXX X<br>XXXXXXXXXXXX XXXX<br>XXXX | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | X  |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                    | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | XX |
| XX | XXXXXXXX<br>XXXXXXXX<br>XXXXXXXX XXXXXXXX<br>XXXXX XXXX XXXX      | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | X  |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                    | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | X  |
| XX | XXXXXX XXXXXXXX<br>XXX XXXXXXXX<br>XXXXX XXXX XXXX                | XXXXX | XXX   | XXXXXXXX | XXXXXXXX | XX | XX |

|    |                                                        |       |     |        |        |    |    |
|----|--------------------------------------------------------|-------|-----|--------|--------|----|----|
| XX | XXXXX XXXXXXXXX<br>XXXXXXXXXXXXX XXXX<br>XXXX          | XXXXX | XXX | XXXXXX | XXXXX  | XX | XX |
| XX | XXX XXXXXXXX<br>XXXXXXXX XXXX<br>XXXX                  | XXXXX | XXX | XXXXXX | XXXXXX | XX | XX |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXXX<br>XXXX XXXX        | XXXXX | XXX | XXXXXX | XXXXXX | XX | XX |
| XX | XXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                  | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXXXXX<br>XXXXXXXX<br>XXXXXXXXXXXXX<br>XXXXXXXXXXXXX | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXXXXX XXXX<br>XXXXXXXX XXXX<br>XXXX                 | XXXXX | XXX | XXXXXX | XXXXXX | XX | XX |
| XX | XXXXXXXX XXXXXXXX<br>XXXX XXXXXXXX<br>XXXX XXXX        | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXXXXX XXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX XXXX       | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXX<br>XXXXXXXXXXXXX<br>XXXX XXXX XXXX               | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX             | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXXXXX XXXXX<br>XXXXXXXX XXXX<br>XXXX                | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXXXXX XXXX<br>XXXXXXXX XXXXXXXX<br>XXXX XXXX        | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |

|    |                                                               |       |     |        |        |    |    |
|----|---------------------------------------------------------------|-------|-----|--------|--------|----|----|
| XX | XXXXX XXXXXXXX<br>XXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX | XXXXX | XXX | XXXXX  | XXXXXX | XX | XX |
| XX | XXXXXXXX XXXXXXXXX<br>XXXX XXXXXXXXX<br>XXXX XXXX             | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXX XXXXXXXXX<br>XXXXX XXXX XXXX                            | XXXXX | XXX | XXXXX  | XXXXX  | XX | XX |
| XX | XXXX<br>XXXXXXXXXXXXXX<br>XXXXX XXXXXXXXX<br>XXXX XXXX        | XXXXX | XXX | XXXXXX | XXXXX  | XX | XX |
| XX | XXXXXX<br>XXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX         | XXXXX | XXX | XXXXXX | XXXXX  | XX | XX |
| XX | XXXXXX<br>XXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX         | XXXXX | XXX | XXXXX  | XXXXXX | XX | X  |
| XX | XXXXX XXXXX<br>XXXXXXXX XXXXXXXX<br>XXXXXXXXXX                | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXX XXXX<br>XXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX       | XXXXX | XXX | XXXXXX | XXXXXX | XX | XX |
| XX | XXXXXXXX XXXX<br>XXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX  | XXXXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXX XXXXXXXXX<br>XXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX  | XXXXX | XXX | X      | X      | X  | X  |

|    |                                                               |       |     |          |          |    |     |
|----|---------------------------------------------------------------|-------|-----|----------|----------|----|-----|
| XX | XXXXX XXXXXXXX<br>XXXXXXXXX XXXXXXXX<br>XXXX XXXX             | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXXX XXXX<br>XXXX               | XXXXX | XXX | XXXXX    | XXXXXX   | XX | XX  |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXX XXXXXXXX<br>XXXX XXXX          | XXXXX | XXX | XXXXX    | XXXXXX   | XX | XX  |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXX X<br>XXXXXXXXXX XXXX<br>XXXX   | XXXXX | XXX | XXXXX    | XXXXXX   | XX | XX  |
| XX | XXXXXXXX XXXX<br>XXXXXXXXXXXXX XXXX<br>XXXX                   | XXXXX | XXX | X        | X        | X  | X   |
| XX | XXXXX XXXXXXXX<br>XXXXXXXXXXXXX XXXX<br>XXXX                  | XXXXX | XXX | XXXXXXXX | XXXXXXXX | XX | XX  |
| XX | XXXXXXXX<br>XXXXXXXXXX XXXXXXXX<br>XXXXXXXXXXXXX<br>XXXX XXXX | XXXXX | XXX | XXXXX    | XXXXXX   | XX | XX  |
| XX | XXXXXXXX XXXXXXXX<br>XXXXX XXXX XXXX                          | XXXXX | XXX | XXXXX    | XXXXXX   | XX | XX  |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXX XXXX<br>XXXX                  | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXX XXXX                                            | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXXX XXXX<br>XXXX               | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXXX XXXX<br>XXXX               | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | XX  |
| XX | XXXXX XXXXXXXX<br>XXXXXXXXXXXXX XXXX                          | XXXXX | XXX | XXXXXXXX | XXXXXX   | XX | XXX |

|    |                                                                           |       |     |          |          |    |     |
|----|---------------------------------------------------------------------------|-------|-----|----------|----------|----|-----|
|    | XXXX                                                                      |       |     |          |          |    |     |
| XX | XXXX XXXX<br>XXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                    | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXX<br>XXXXXXXX XXXXXXXX<br>XXXX XXXX                           | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXXXXXX<br>XXXX XXXX                        | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXXXXXX<br>XXXX XXXXXXX XXXX<br>XXXX                            | XXXXX | XXX | X        | X        | X  | X   |
| XX | XXXXX XXXXXXX<br>XXXXXXXX XXXX XXXX                                       | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXX<br>XXXXXXXX XXXXXXXX<br>XXXXX XXXX XXXX | XXXXX | XXX | XXXXX    | XXXXX    | XX | XX  |
| XX | XXXXXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                             | XXXXX | XXX | XXXXX    | XXXXXX   | XX | XX  |
| XX | XXXX XXXX XXXX                                                            | XXXXX | XXX | XXXXXX   | XXXXXX   | XX | X   |
| XX | XXXXXXXX XXXXXXX<br>XXXXXXXX XXXX<br>XXXX                                 | XXXXX | XXX | XXXXXX   | XXXXX    | XX | XX  |
| XX | XXXXXXXX XXXX                                                             | XXXXX | XXX | XXXXXXXX | XXXXXXXX | XX | XXX |
| XX | XXXXXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                             | XXXXX | XXX | XXXXXX   | XXXXX    | XX | XX  |
| XX | XXXXXXXX X X XXXX<br>XXXXXXXXXXXX<br>XXXX XXXX                            | XXXXX | XXX | XXXXXXXX | XXXXXXXX | XX | XXX |

|    |                                                             |     |     |        |        |    |    |
|----|-------------------------------------------------------------|-----|-----|--------|--------|----|----|
| XX | XXXXXXXX XXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX              | XXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXX XXX<br>XXXXXXXX XXXX<br>XXXX                          | XXX | XXX | XXXXXX | XXXXXX | XX | XX |
| XX | XXXX XXXXXX<br>XXXXXXXX XXXX<br>XXXX                        | XXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXXXXX XXXXX<br>XXXXXXXXXXXX<br>XXXX XXXX                 | XXX | XXX | XXXXX  | XXXXXX | XX | XX |
| XX | XXXXXXXX XXXXXXX<br>XXXX XXXXXXX XXXX<br>XXXX               | XXX | XXX | XXXXXX | XXXXXX | XX | XX |
| XX | XXX XXXXXXX XXXX<br>XXXX XXX XXXX                           | XXX | XXX | XXXXXX | XXXXX  | XX | XX |
| XX | XXXXXXXX XXXXXXX<br>XXXXXXXX XXXX<br>XXXX                   | XXX | XXX | XXXXX  | XXXXX  | XX | XX |
| XX | XXXXXXXX XXXXXXX<br>XXXXXXXX XXXX<br>XXXX                   | XXX | XXX | XXXXX  | XXXXXX | XX | XX |
| XX | XXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                  | XXX | XXX | XXXXX  | XXXXXX | XX | XX |
| XX | XXXXX XXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                    | XXX | XXX | XXXXXX | XXXXXX | XX | X  |
| XX | XXXXX XXXXXXXXXX<br>XXXXXXXX XXXX XXXX                      | XXX | XXX | XXXXXX | XXXXXX | XX | XX |
| XX | XXXXXXXX XXXXXXX X<br>XXXXX<br>XXXXXXXXXXXXXXX<br>XXXX XXXX | XXX | XXX | X      | X      | X  | X  |
| XX | XXXXXXXX XXXXXXX                                            | XXX | XXX | X      | X      | X  | X  |



|    |                                                                |     |     |        |        |    |     |
|----|----------------------------------------------------------------|-----|-----|--------|--------|----|-----|
|    | XXXXXXXXXXXXXXXX<br>XXXXX XXXX XXXX                            |     |     |        |        |    |     |
| XX | XXXXXXXXXXXXXXXX<br>Bio-technology XXXX<br>XXXX                | XXX | XXX | XXXXX  | XXXXXX | XX | XX  |
| XX | XXXXX XXXXXXXXXXX<br>XXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX | XXX | XXX | XXXXXX | XXXXXX | XX | XX  |
| XX | XXXX XXX<br>XXXXXXXXXXXXXXXX<br>XXXXXX                         | XXX | XXX | XXXXXX | XXXXXX | XX | X   |
| XX | XXXXXXXXXXXXXXXX<br>XXX XXXXXXXXXXXX<br>XXXX XXXX              | XXX | XXX | XXXXXX | XXXXXX | XX | XXX |
| XX | XXXXX XXXXXXXXXXX<br>XXXXXXXXXX XXXX<br>XXXX                   | XXX | XXX | XXXXX  | XXXXXX | XX | XX  |
| XX | XXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                     | XXX | XXX | XXXXXX | XXXXXX | XX | X   |
| XX | XXXXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                  | XXX | XXX | X      | X      | X  | X   |
| XX | XXXXXXXXXXXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                  | XXX | XX  | XXXXXX | XXXXXX | XX | XX  |
| XX | XXXXX XXXXXXX<br>XXXXXXXXXXXX XXXX<br>XXXX                     | XXX | XX  | XXXXXX | XXXXXX | XX | XX  |
| XX | XXXX XXXXX<br>XXXXXXXXXXXXXXXX<br>XXXX XXXX                    | XXX | XX  | XXXXXX | XXXXXX | XX | XX  |
| XX | XXXXXXXXXXXXXXXX<br>XXXXXXXXXXXXXXXX<br>XXXX XXXX              | XXX | XX  | XXXXXX | XXXXXX | X  | X   |
| XX | XXXXXXXXXXXXXXXX<br>XXXX XXXXXXXXXXXX<br>XXXX XXXX             | XXX | XX  | XXXXX  | XXXXXX | XX | X   |

|     |                                                                  |     |    |          |        |    |     |
|-----|------------------------------------------------------------------|-----|----|----------|--------|----|-----|
| XX  | XXXXX XXXX<br>XXXXXXXXXX XXXX<br>XXXX                            | XXX | XX | XXXXX    | XXXXX  | XX | XX  |
| XX  | XXXXXXXX XXXXXXXX<br>XXXXXXXXXX XXXX<br>XXXX                     | XXX | XX | X        | X      | X  | X   |
| XX  | XXXXXXXX XXXXXXXX<br>XXXXXXXXXX XXXXXXXX<br>XXXX XXXX            | XXX | XX | XXXXXX   | XXXXXX | X  | X   |
| XX  | XXXXXXXX XXXXXXXX<br>XXXXXXXXXX<br>XXXXXXXXXX XXXXX<br>XXXX XXXX | XXX | XX | XXXXXX   | XXXXXX | X  | X   |
| XX  | XXXXXXXX XXXXXXXX<br>XXXXXXXXXX<br>XXXXXXXXXX XXXX<br>XXXX       | XXX | XX | XXXXX    | XXXXX  | XX | XX  |
| XX  | XXXXXXXX XXXXXXXX<br>XXXX XXXXXXXXXX<br>XXXX XXXX                | XXX | XX | XXXXX    | XXXXXX | XX | XX  |
| XXX | XXXXXXXX XXXXXXXX<br>XXXX XXXXXXXX<br>XXXX XXXX                  | XXX | XX | XXXXXXXX | XXXXXX | XX | XXX |

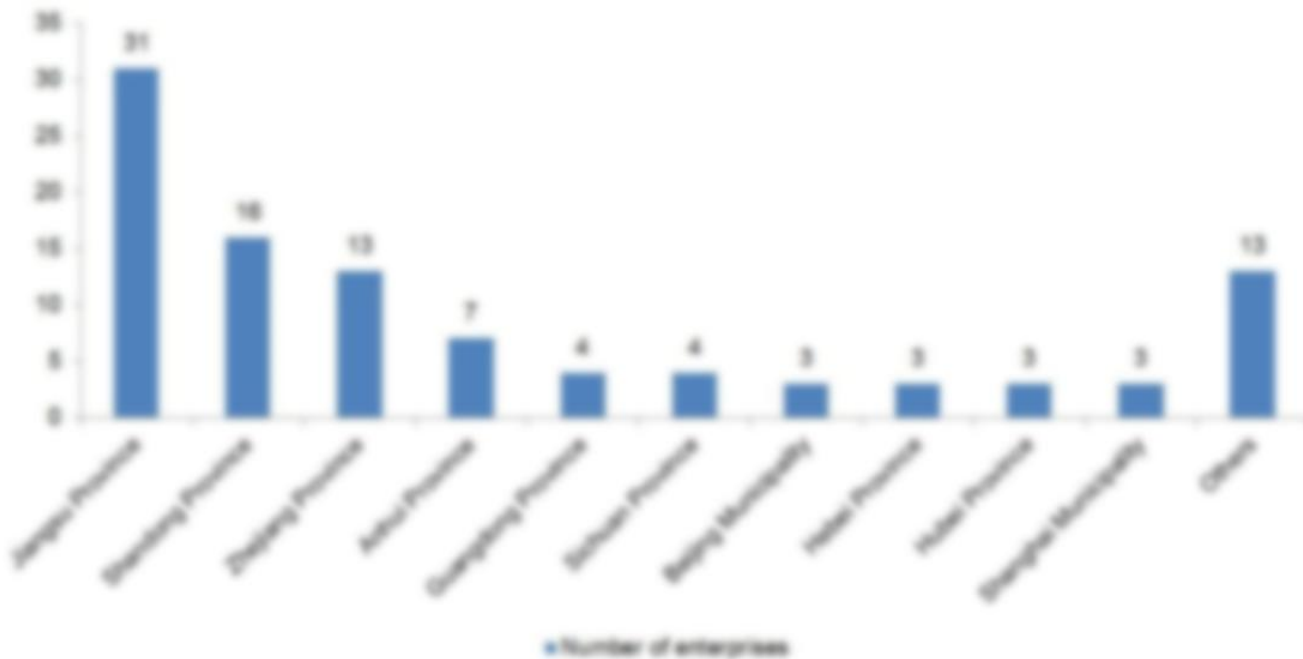
Source:CCPIA & CCM

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### 3.2 Geographical distribution of 2022 China Top 100 Pesticide Enterprises

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Figure 3.2-1 Number of 2022 Top 100 Pesticide Enterprises in China by province/region, 2021



Source:CCPIA & CCM

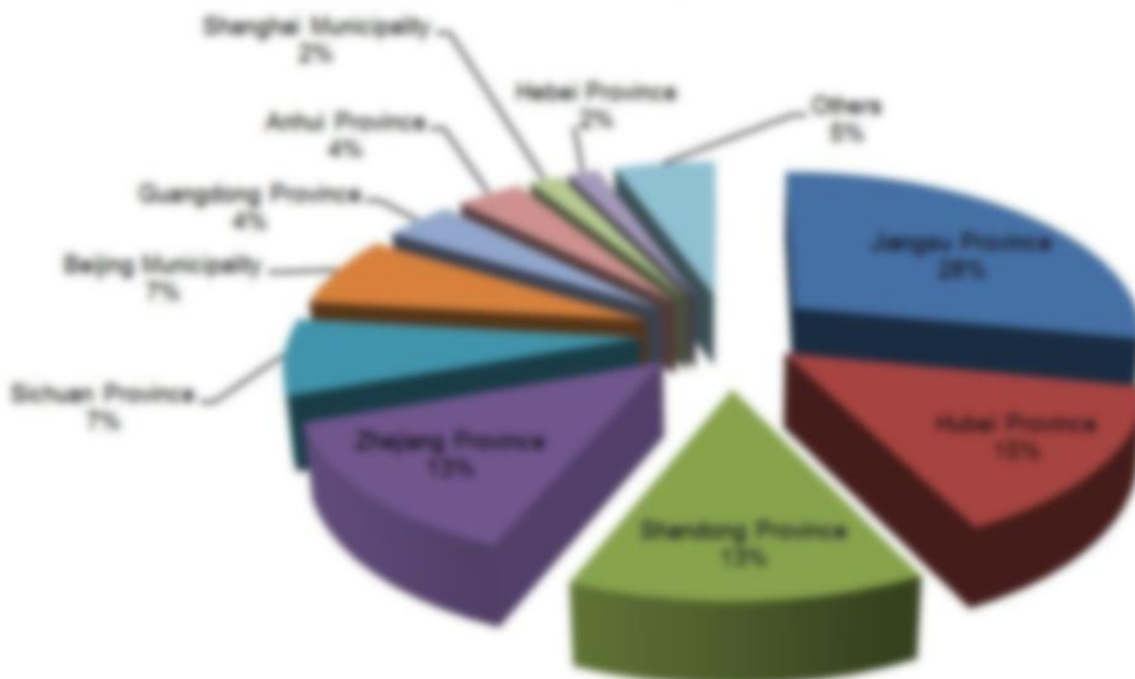
Table 3.2-1 Revenue of 2022 China Top 100 Pesticide Enterprises by province/region, 2021

| No. | Province/ XXXXXX                       | Pesticide revenue in 2021, million RMB | Pesticide revenue in 2021, million USD |
|-----|----------------------------------------|----------------------------------------|----------------------------------------|
| X   | XXXXXXXX XXXXXXXX                      | XXXXXX                                 | XXXXXX                                 |
| X   | XXXXX XXXXXXXX                         | XXXXXX                                 | XXXXX                                  |
| X   | XXXXXXXXX XXXXXXXX                     | XXXXXX                                 | XXXXX                                  |
| X   | XXXXXXXXX XXXXXXXX                     | XXXXXX                                 | XXXXX                                  |
| X   | XXXXXXX XXXXXXXX                       | XXXXXX                                 | XXXXX                                  |
| X   | XXXXXXXX XXXXXXXXXXXX                  | XXXXXX                                 | XXXXX                                  |
| X   | XXXXXXXXX XXXXXXXX                     | XXXXX                                  | XXXXX                                  |
| X   | XXXXX XXXXXXXX                         | XXXXX                                  | XXXXX                                  |
| X   | XXXXXXXX XXXXXXXXXXXX                  | XXXXX                                  | XXX                                    |
| XX  | XXXXX XXXXXXXX                         | XXXXX                                  | XXX                                    |
| XX  | XXXXXXXX XXXXXX XXXXXXXXXXXX<br>XXXXXX | XXXXX                                  | XXX                                    |

|       |                                      |          |        |
|-------|--------------------------------------|----------|--------|
| XX    | XXXXXXXX XXXXXXXXX                   | XXXXX    | XXX    |
| XX    | XXXXX XXXXXXXXX XXXXXXXXXX<br>XXXXXX | XXXXX    | XXX    |
| XX    | XXXXX XXXXXXXXX                      | XXXXX    | XXX    |
| XX    | XXXXXXXX XXXXXXXXX                   | XXXXX    | XXX    |
| XX    | XXXXX XXXXXXXXX                      | XXXXX    | XXX    |
| XX    | XXXXX XXXXXXXXX                      | XXX      | XXX    |
| XX    | XXXXXXXXXX XXXXXXXXXXXXXXX           | XXX      | XXX    |
| XX    | XXXXXXXX XXX XXXXXXXXXXXXX<br>XXXXXX | XXX      | XX     |
| XX    | XXXXXX XXXXXXXXX                     | XXX      | XX     |
| XXXXX |                                      | XXXXXXXX | XXXXXX |

Source:CCPIA & CCM

Figure 3.2-2 Share of pesticide revenue of 2022 China Top 100 Pesticide Enterprises by province/region, 2021



Source:CCPIA & CCM

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## 4.1 China's Top 100 Pesticide Formulation Enterprises

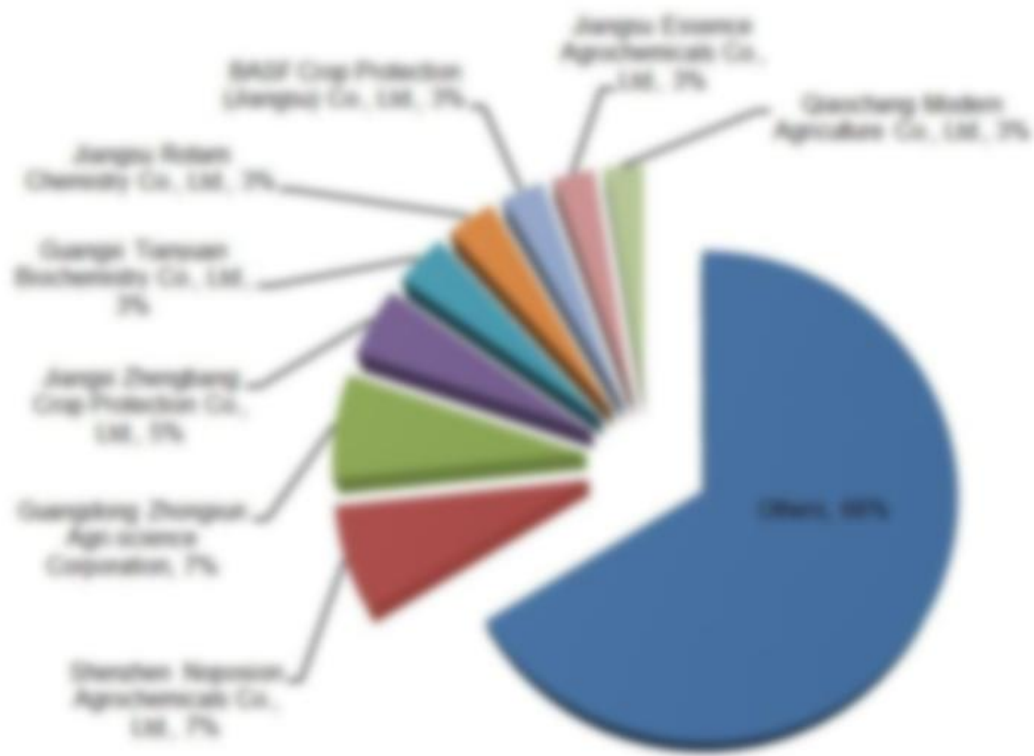
Taking advantages of industry transformation and upgrading of pesticide formulation business promoted in China last year, the XXXX top XXX China formulation enterprises achieved total revenue of USDX.XX billion (RMBXX.XX billion), a yearly increase of XX.XX%.

The average revenue of the top XXX enterprises from formulation business was USDXX million (RMBXXX million) in XXXX, XX% less than what amount the top XXX pesticide enterprises earned (=RMBX,XXX million on average) in the same year. The overall sales from formulations have increased significantly last year, though there are only X at the higher range, each with sales of above USDXXX million (RMBX billion). The aggregate sales of the top XX formulation enterprises approached USDX.XX billion (RMBXX.XX billion), accounting for XX.XX% of the total, with an increase of XX.XX% over the previous year. The sales of the top XX stay above USDXX million (RMBXXX million). The threshold for entry to the XXXX formulation list reaches USDXX million (RMBXXX million), up by X.XX% year-on-year.

Specifically, Shenzhen Noposion Agrochemicals Co., Ltd. (Shenzhen Noposion) catches the first place again, with sales of USDXXX million (RMBX.XX billion) in XXXX. Guangdong Zhongxun Agri-science Corporation came second, with sales of USDXXX million (RMBX.XX billion). The Xrd, Xth and Xth places are claimed by Jiangxi Zhengbang Crop Protection Co., Ltd., Guangxi Tianyuan Biochemistry Co., Ltd. and Jiangsu Rotam Chemistry Co., Ltd. The top X remain the same as XXXX.

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Figure 4.1-1 Shares of major enterprises of the 2022 China Top 100 Pesticide Formulation Enterprises



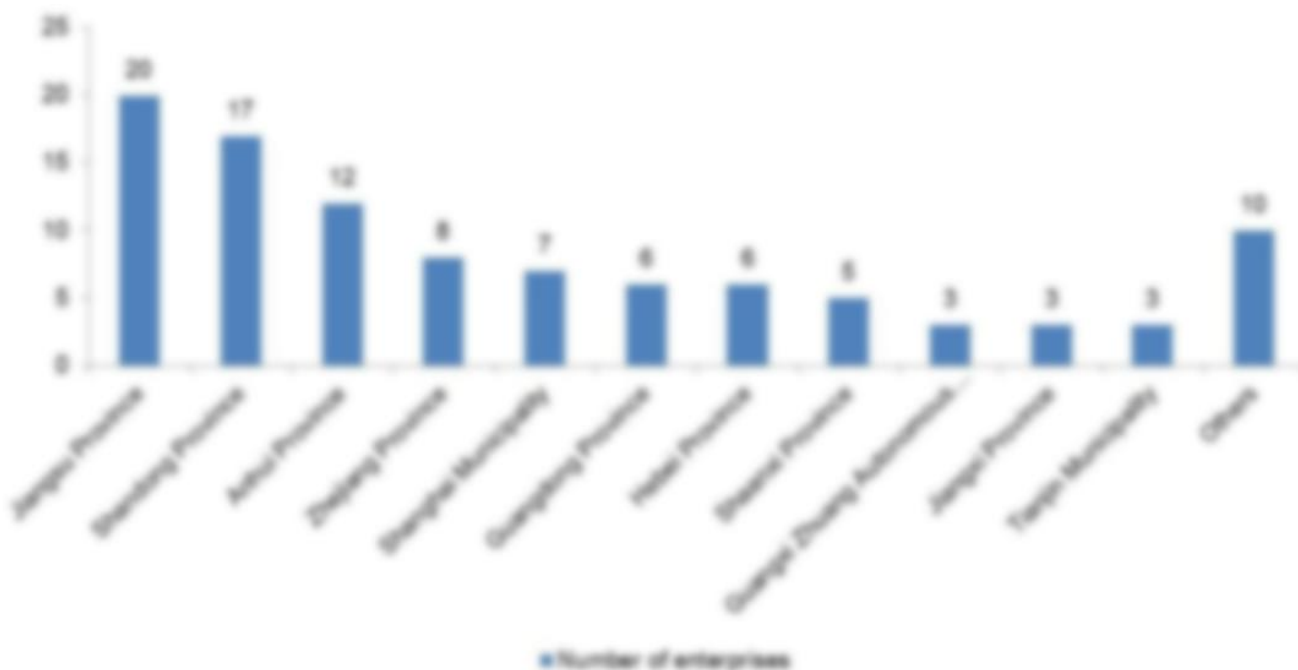
Source:CCM

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## 4.2 Geographical distribution of 2022 China Top 100 Pesticide Formulation Enterprises

Through the analysis of the geographical distribution of XXXX China Top XXX pesticide formulation enterprises, it is known to us that the sales of Jiangsu Province was USDX.XX billion (RMBX.XX billion), XX.XX% of the total, ranking the first. Jiangsu Province has XX companies entering the list of Top XXX pesticide formulation enterprises, X more over last list. Although Shandong Province had XX companies into the list, their combined revenue reached USDX.XX billion (RMBX.XX billion), XX.XX% of the total, ranking the third. Guangdong Province ranked the second, with only X companies on the list and the revenue of USDX.XX billion (RMBX.XX billion). It's worth noting that Shenzhen Noposion Agrochemicals Co., Ltd. and Guangdong Zhongxun Agri-science Corporation ranked first and second separately in the list, both of them are from Guangdong Province.

Figure 4.2-1 Number of 2022 Top 100 Pesticide Formulation Enterprises in China by province/region, 2021



Source:CCPIA & CCM

Table 4.2-1 Revenue of 2022 China Top 100 Pesticide Formulation Enterprises by province/region, 2021

| No. | Province/Region                        | Pesticide revenue in 2021, million RMB | Pesticide revenue in 2021, million USD |
|-----|----------------------------------------|----------------------------------------|----------------------------------------|
| X   | XXXXXXXX XXXXXXXX                      | XXXXX                                  | XXXXX                                  |
| X   | XXXXXXXX XXXXXXXX                      | XXXXX                                  | XXXXX                                  |
| X   | XXXXXXXX XXXXXXXX                      | XXXXX                                  | XXXXX                                  |
| X   | XXXXX XXXXXXXX                         | XXXXX                                  | XXX                                    |
| X   | XXXXXXXX XXXXXXXX                      | XXXXX                                  | XXX                                    |
| X   | XXXXXXXX XXXXXXXXXXXX                  | XXXXX                                  | XXX                                    |
| X   | XXXXXXXX XXXXXX XXXXXXXXXXXX<br>XXXXXX | XXXXX                                  | XXX                                    |
| X   | XXXXXXXX XXXXXXXX                      | XXXXX                                  | XXX                                    |
| X   | XXXXXXXX XXXXXXXX                      | XXXXX                                  | XXX                                    |
| XX  | XXXXX XXXXXXXX                         | XXXXX                                  | XXX                                    |

|       |                        |        |       |
|-------|------------------------|--------|-------|
| XX    | XXXXXXXX XXXXXXXXX     | XXXXX  | XXX   |
| XX    | XXXXXXXX XXXXXXXXXXXXX | XXX    | XXX   |
| XX    | XXXXXXXX XXXXXXXXXXXXX | XXX    | XXX   |
| XX    | XXXXX XXXXXXXXX        | XXX    | XX    |
| XX    | XXXXXX XXXXXXXXX       | XXX    | XX    |
| XX    | XXXXX XXXXXXXXX        | XXX    | XX    |
| XX    | XXXXXX XXXXXXXXX       | XXX    | XX    |
| XX    | XXXXX XXXXXXXXX        | XXX    | XX    |
| XX    | XXXXXX XXXXXXXXX       | XXX    | XX    |
| XXXXX |                        | XXXXXX | XXXXX |

Source:CCPIA & CCM

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