

Overview of Pesticide Industry in China in 2022

The Third Edition

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Kcomber Inc.

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1. Introduction

In China, the pesticide performance for 2022 varied by products. In terms of supply, the operating rate of major pesticide technical manufacturers has been low in general, as the domestic demand for major pesticides seeing marginal growth in the year, data from CCM's survey shown. However, there are potential pesticide capacities building in the country projected to a booster to the industry, including that of Hebei Veyong Bio-chemical Co., Ltd. (a subsidiary of Limin Chemical Co., Ltd.), Ningxia Wynca Technology Co., Ltd., etc.

For 2023, genetically modified crops that are gaining popularity in China grows into another driver for a more concentrated pesticide industry, likely benefiting the glyphosate technical market and others, in which main manufacturers like Zhejiang Wynca Chemical Group Co., Ltd., Hubei Xingfa Chemicals Group Co., Ltd., Fuhua Tongda Chemical Co., Ltd. and Nantong Jiangshan Agrochemical & Chemicals Co., Ltd. are playing increasingly important roles.

In this report, CCM will do analysis of the supply and demand of pesticides in China in 2022 from the following aspects:

- Overview of pesticide supply situation in China
- Newly added capacities in H1 2022
- Forecast of pesticide demand in China
- Market analysis of major pesticides in China

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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.

- 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:

- 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.

3. Executive summary

China's pesticide technical output in Jan.–Sept. XXXX dropped by X.XX% YoY, coupling with the XX.X% and XX.X% drops in export value and volume, respectively. There are potential pesticide technical capacities completed in construction in HX XXXX, ready for commissioning and/or production operation.

Although the occurrence of pests, diseases, weeds and rodents has mitigated, the overall situation remains severe in China in XXXX. In XXXX, the domestic demand for major pesticides saw marginal growth. However, by XXXX, the usage of chemical pesticides (converted by XXX% AI) is estimated to reduce, by X% for major food crops (rice, wheat and corn), and by XX% for the economic crops.

In China, the pesticide performance for XXXX varied by products. China's glyphosate market suffers tight supply in XXXX, while overall demand declines but is deemed prospective in the year to come. The glufosinate-ammonium technical supply in China has been stable, with new capacity launching in XXXX. In QX–QX, the supply of acetochlor technical went up as some major manufacturers resumed production, after seeing a shortfall in QX.

4. What is in the report?

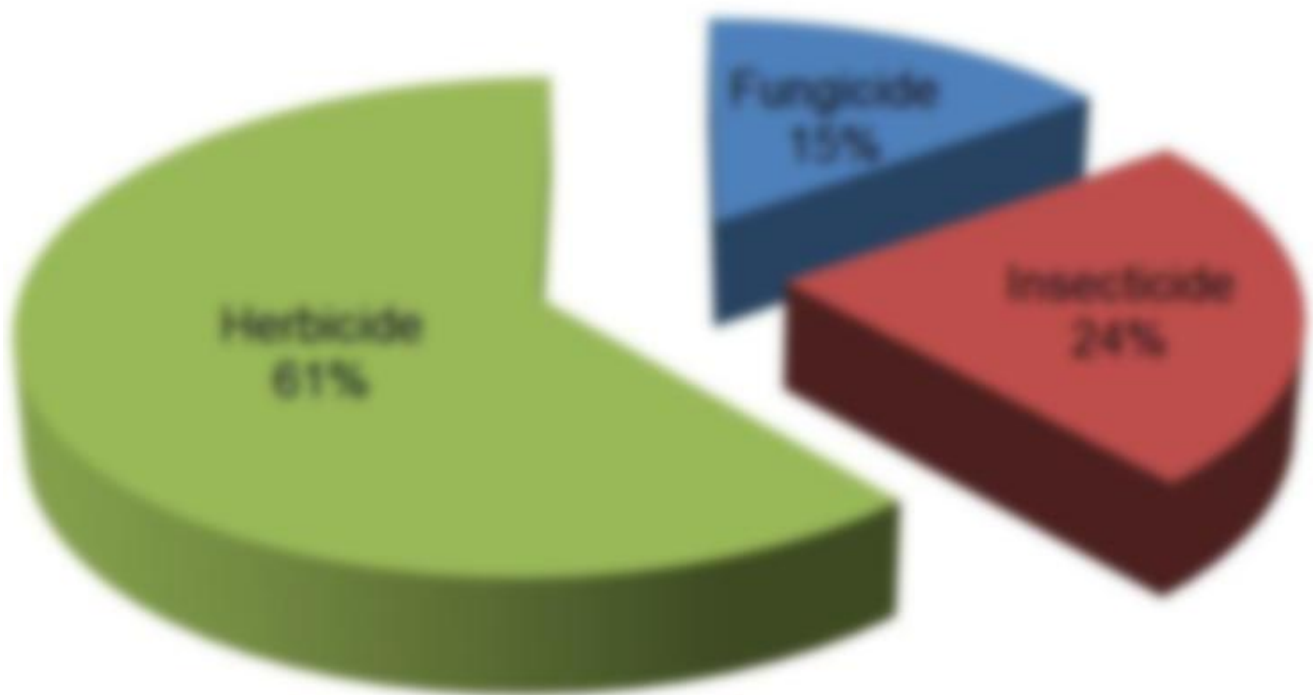
Note: Key data/information in this sample page is hidden, while in the report it is not.

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1.2 Situation of pesticide exports in China, Q1-Q3 2022

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Figure 1.2-1 Composition of export value of China's pesticide technical by category in Q1–Q3 2022



Source:Tranalysis

Table 1.2-1 Export volume (in real terms) of China's pesticide technical by category in Q1–Q3 2022, tonne

Time	Herbicide	Insecticide	Fungicide	XXXXX	YoY Change of the XXXXX
XX XXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXX
XX XXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXX
XX XXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXX
XXXXX XX XXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXXXXXXXX	XXXXXX

Source:Tranalysis

...

1.3 Newly added capacities in H1 2022

According to CCM's survey, the overall production of pesticide in China has run on a regular basis in XXXX, though some operations have become idle due to maintenance or environmental impact inspection in Aug. and Sept., leading to a tighter supply in later period. In Nov. and Dec., COVID-XX cases spread after the country's easing restrictions. Approaching the New Year's Day and Chinese Spring Festival, factory operation has reduced to a low level. The pesticide market enters a mild off-season.

There are potential pesticide capacities completed in construction in HX XXXX, ready for commissioning and production operation, likely to affect the supply and demand situation of China's pesticide industry in the coming future.

Table 1.3-1 Potential capacities of herbicides in China, H1 2022

No.	Company name	Parent company	Concerning products	TC capacity, t/a	Status	XXXXXXXXX /Region
X	XXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXX XXXXXXXXX XXXX XXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX XXXXXXXXXX XXXXXXXXXXXX XXX XXXXXXXX	XXXXXX	XXXXX XXX XXXXX XXXXXXXXXXXX	XXXXX XXXXXXXXXX
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X	XXXXX XXXXXXX XXXXXXXXXXXX XXXX XXXX	X	XXXXXXXXXXXX	XXXXX	XX XXXXXXXXXXX	XXXXX XXXXXXXXXX

Source:CCM

Table 1.3-2 Potential capacities of insecticides in China, H1 2022

No.	Company name	Parent company	Concerning products	TC capacity, t/a	Status	XXXXXXXXX /Region
X	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXX	X	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX	XXXXXXXXX	XXXXXX XXXXXXXXXXXX	XXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXX
X	XXXXXXXXXXXX XXXX XXXXXXXXXXXX XXXX XXXX	XXXXXXXX XXXXXXXX XXXXXXXXXXXX XXXX	XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXX	XXXXXX	XXXXXX XXXXXXXXXXXX	XXXXXXXX XXXXXXXX
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Source:CCM

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2.2 Forecast on occurrence of diseases and pests, 2022

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Table 2.2-1 Occurrence area of wheat pests in China, 2018–2022E

No.	Pest	Occurrence area, million ha				
		2018	2019	2020	2021	2022E
X	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
X	XXXXX XXXXX XXXX	XXXX	XXX	XXXX	XXXX	XXXX
X	XXXXX XXXXXXXX XXXXX	XXXX	XXX	XXX	XXX	XXX
X	XXXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXXXXXX XXXXXXXX XXXXX XXXX XXXXXXXX XXXXXXXX mosellana, XXXXXXX XXXXXXXX XXXXXXX XXX XXXXX XXXXX	XXXX	XXX	XXX	XXXX	XXXX
	XXXXX	XXXXX	XXX	XXXXX	XXXXX	XXXXX

Note:2022E stands for 2022 estimated.

Source:National Agricultural Technology Extension Service Center (NATESC)

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3.1 Glyphosate

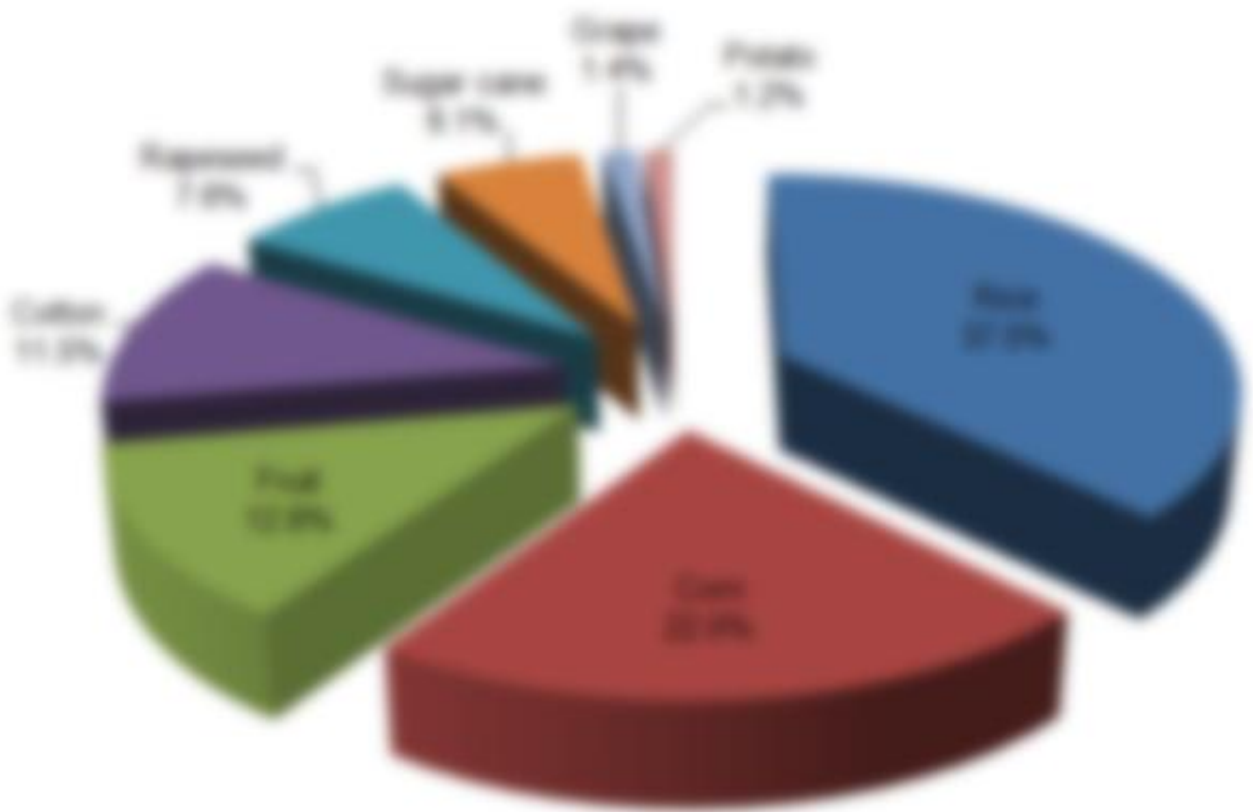
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Table 3.1-1 China's consumption of glyphosate by main crops, 2022

Category	Volume ratio in 2022	YoY Change
XXXX XXXXX	XXXXXX	XXXXXX
XXXXXXXXX XXXXX	XXXXXX	XXXXXX
XXXXX	XXXXXXXX	XXXXXX

Source:CCM

Figure 3.1-1 Consumption share of glyphosate in China by crops, 2022



Source:CCM

Table 3.1-2 Major manufacturers of glyphosate technical in China, 2022

No.	Manufacturer
X	XXXXXXXX XXXXX XXXXXXXXXXX XXXXX XXXX XXXX
X	XXXXXXXX XXXXXXX XXXXXXXXXXXXXXXXXXX XXXX XXXX
X	XXXXX XXXXXXX XXXXXXXXXXX XXXX XXXX
X	XXXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXX X XXXXXXXXXXX XXXX XXXX
X	XXXXX XXXXXXX XXXXXXXXXXX XXXXX XXXX XXXX
X	XXXXXXXX XXXXXXXXXXX XXXXXXXXXXX XXXXX XXXX XXXX

Note: The list is not ranked.
Source: CCM

3.2 Glufosinate-ammonium

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Table 3.2-1 China's consumption of glufosinate-ammonium by main crops, 2022

Category	Volume Ratio in 2022	YoY Change
XXXX XXXXX	XXXXXX	XXXXXX
XXXXXXXX XXXXX	XXXXXX	XXXXXX
XXXXX	XXXXXXX	XXXXXX

Source: CCM

...

3.3 Acetochlor

...

Table 3.3-1 Major manufacturers of acetochlor technical in China in 2022

No.	Manufacturer
X	XX
X	XX
X	XX
X	XX
X	XX

Note: The list is not ranked.
Source: CCM

3.4 Chlorpyrifos

China's chlorpyrifos market is led by main manufacturers including Nanjing Red Sun Co., Ltd., Zhejiang Xinnong Chemical Co., Ltd., and Jiangsu Fengshan Group Co., Ltd.

-Supply

In 2022, China's chlorpyrifos manufacturers maintained normal operating rates and the domestic market supply is sufficient, except in April and May, when the operating rate was low for the epidemic control measures in some regions.

-Demand

In 2022, the domestic consumption is about 4,700 tonnes. 59% of chlorpyrifos is mainly used for economic crops in China: 35.6% are for sugar cane, followed by fruit and rice.

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3.5 Imidacloprid

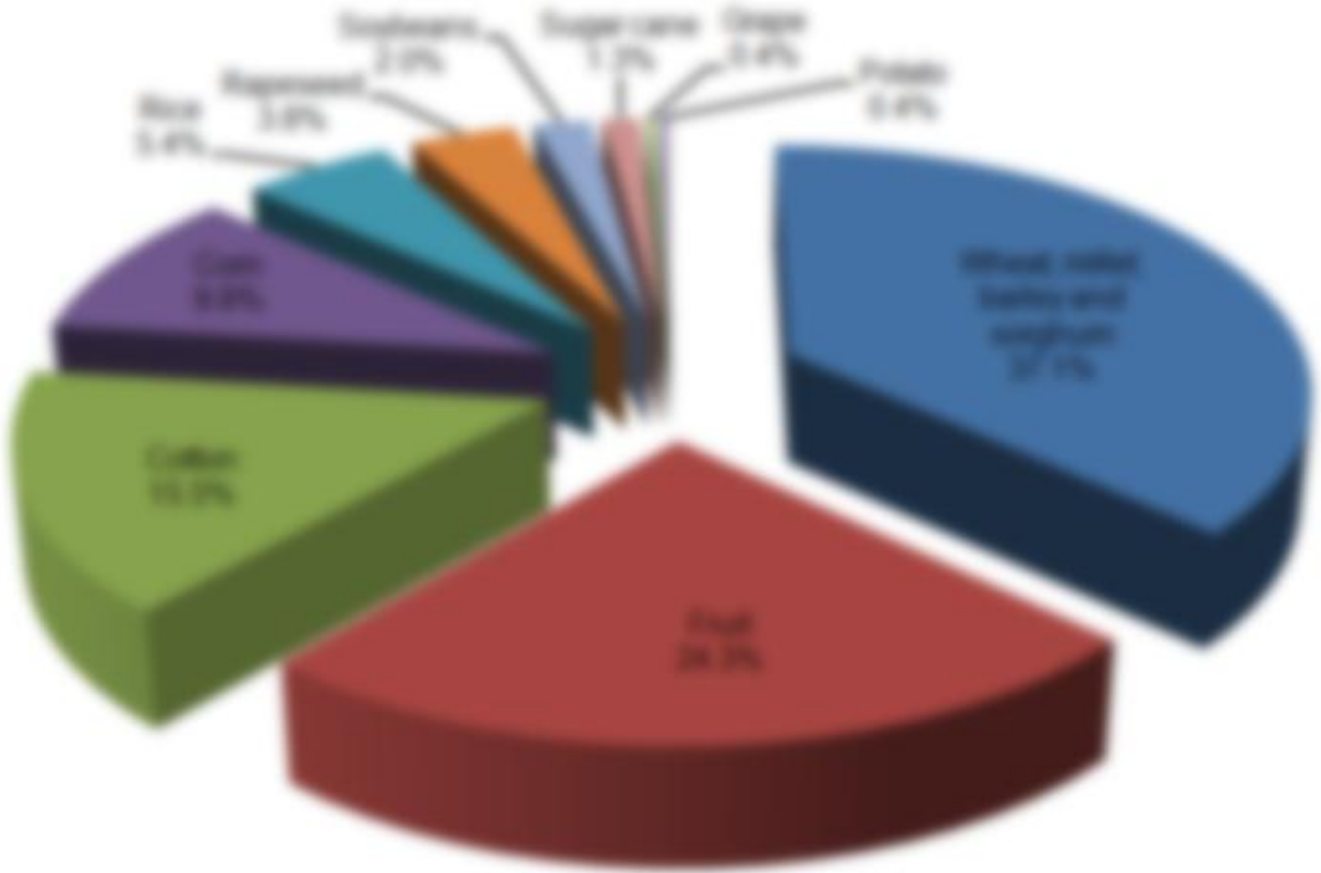
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Table 3.5-1 China's consumption of imidacloprid by main crops, 2022

Category	Volume Ratio in 2022	YoY Change
XXXX XXXXX	XXXXXX	XXXXXX
XXXXXXXX XXXXX	XXXXXX	XXXXXX
XXXXX	XXXXXXX	XXXXXX

Source:CCM

Figure 3.5-1 Consumption share of imidacloprid in China by crops, 2022



Source:CCM

Table 3.5-2 Major manufacturers of imidacloprid technical in China in 2022

No.	Manufacturer
X	XX
X	XX
X	XX
X	XX
X	XX

Note: The list is not ranked.

Source:CCM

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If you want more information, please feel free to contact us



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