

# Impact of the COVID-19 pandemic on pesticide industry

The Second Edition

August 2022

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**Kcomber Inc.**

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# Contents

<b>Executive summary</b> .....	1
<b>Methodology</b> .....	2
<b>1 Briefing on the impact of COVID-19 pandemic in China</b> .....	3
1.1 Regional changes of pesticide technical output in China .....	3
1.2 Regional measures and effects amid the COVID-19 pandemic .....	4
1.3 Overall price trend of China's pesticides in H1 2022 .....	6
<b>2 Impact on imports and exports of pesticide in China, H1 2022</b> .....	8
2.1 Imports and exports of China's pesticides by volume .....	8
2.2 Imports and exports of China's pesticides by value .....	10
<b>3 Impact of the COVID-19 pandemic on AI, H1 2022</b> .....	13
3.1 Price analysis of main herbicides in China, H1 2022 .....	13
3.1.1 Glyphosate .....	13
3.1.2 Nicosulfuron .....	14
3.2 Price analysis of main insecticides in China, H1 2022 .....	15
3.2.1 Imidacloprid .....	15
3.2.2 Chlorpyrifos .....	16
3.2.3 Emamectin benzoate .....	17
3.3 Price analysis of main fungicides in China, H1 2022 .....	18
3.3.1 Tebuconazole .....	18
3.3.2 Azoxystrobin .....	19
3.3.3 Carbendazim .....	20
<b>4 Impact on the supply side amid the COVID-19 pandemic</b> .....	22
4.1 Jiangsu Province .....	22
4.2 Sichuan Province .....	22
4.3 Shandong Province .....	23
4.4 Zhejiang Province .....	23
4.5 Anhui Province .....	24
4.6 Hubei Province .....	25
4.7 Hebei Province .....	25

## LIST OF TABLES

Table 1.1-1 China's pesticide technical output by province/region, 2020–May 2022, tonne
Table 1.2-1 Regional measures against the COVID-19 pandemic in China
Table 2.1-1 Import volume of pesticides in China, Jan.–June 2022, tonne
Table 2.1-2 Export volume of pesticides in China, Jan.–June 2022, tonne
Table 2.2-1 Imports value of pesticides in China, Jan.–June 2022, USD
Table 2.2-2 Exports value of pesticides in China, Jan.–June 2022, USD
Table 3.1.1-1 Operating rates of 5 major glyphosate technical manufacturers in China, Jan.–June 2022
Table 3.1.2-1 Operation status of 3 major nicosulfuron technical manufacturers in China, Jan.–June 2022
Table 3.2.1-1 Operation status of 4 major imidacloprid technical manufacturers in China, Jan.–June 2022
Table 3.2.2-1 Operation status of 3 major chlorpyrifos technical manufacturers in China, Jan.–June 2022
Table 3.2.3-1 Operation status of 3 major emamectin benzoate technical manufacturers in China, Jan.

–June 2022

Table 3.3.1-1 Operation status of 3 major tebuconazole technical manufacturers in China, Jan.–June 2022

Table 3.3.2-1 Operation status of 3 major azoxystrobin technical manufacturers in China, Jan.–June 2022

Table 3.3.3-1 Operation status of 4 major carbendazim technical manufacturers in China, Jan.–June 2022

## LIST OF FIGURES

Figure 1.1-1 Changes on regional output of pesticide technical, 2021 vs 2019, 2021 vs 2020, Jan.-May 2022 vs 2021

Figure 1.3-1 China Agrochemical Price Index (CAPI), June 2021–May 2022

Figure 2.1-1 Imports volume of pesticides, H1 2022 vs H1 2021

Figure 2.1-2 Exports volume of pesticides, H1 2022 vs H1 2021

Figure 2.2-1 Imports value of pesticides, H1 2022 vs H1 2021

Figure 2.2-2 Exports value of pesticides, H1 2022 vs H1 2021

Figure 3.1.1-1 Ex-works prices of 95% glyphosate technical in China, Jan.–June 2022

Figure 3.1.2-1 Ex-works prices of 95% nicosulfuron technical, Jan.–June 2022

Figure 3.2.1-1 Ex-works prices of 97% imidacloprid technical in China, Jan.–June 2022

Figure 3.2.2-1 Ex-works prices of chlorpyrifos technical in China, Jan.–June 2022

Figure 3.2.3-1 Ex-works prices of 70% emamectin benzoate technical in China, Jan.–June 2022

Figure 3.3.1-1 Ex-works prices of 97% tebuconazole technical in China, Jan.–June 2022

Figure 3.3.2-1 Ex-works prices of 96% azoxystrobin technical in China, Jan.–June 2022

Figure 3.3.3-1 Ex-works prices of 98% carbendazim technical (White colour), Jan.-June 2022

Figure 4.1-1 Pesticide output of Jiangsu Province, 2021–Q1 2022

Figure 4.2-1 Pesticide output of Sichuan Province, 2021–Q1 2022

Figure 4.3-1 Pesticide output of Shandong Province, 2021–Q1 2022

Figure 4.4-1 Pesticide output of Zhejiang Province, 2021–Q1 2022

Figure 4.5-1 Pesticide output of Anhui Province, 2021–Q1 2022

Figure 4.6-1 Pesticide output of Hubei Province, 2021–Q1 2022

Figure 4.7-1 Pesticide output of Hebei Province, 2021–Q1 2022

## 1. Introduction

In early 2020 when the first wave of COVID-19 stroke Hubei Province, nationwide lockdowns and traffic controls had influenced negatively and severely the production and operation in China's pesticide industry.

In Q2 2020, China took lead in controlling the infections and advanced work resumption. However, on the international level, global trade got a hit—pesticide production of the foreign peers was disturbed by the spread of the COVID-19 pandemic. The overseas demand for China's pesticides was boosted, driving up the domestic exports.

In 2021, the domestic businesses continued to recover from the early stage of the pandemic impact, with the output and exports of pesticides growing above the pre-pandemic levels, albeit at a moderate pace. However, obstacles like supply chain disruptions, soaring prices for large commodities and costs of manufacturing, shipping, labour, etc. have placed heavy burdens on Chinese pesticide producers.

Entering 2022, the Delta and Omicron variants occurred across mainland China have hampered domestic production, especially in medium- and high-risk areas, and challenged the nationwide logistics, even though there were varied political and financial aids launched by the central and local governments.

In this report, CCM will do analysis of the impact of the COVID-19 pandemic on pesticide industry in China from the following aspects:

- √ Pesticide industry
- √ Import & export
- √ AI
- √ Agrochemical companies

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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 websites and statistics, industrial 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.

- Internet

CCM visited government websites and 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
- 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

Amid COVID-XX control period, China's pesticide manufacturers encountered with challenges, such as suspended pesticide production, hindered domestic logistics, postponed export procedures, etc. China's central and local governments have put in place various supporting measures to lessen relevant negative effects. For instance, Jiangsu Province, topped the lists of major provinces producing pesticide technical in China by total output in XXXX and XXXX, is expecting an output increase, considering its achievement with X.XX% YoY growth made in QX XXXX.

With China's effective control of the pandemic since XXXX hinting the recovery of pesticide industry, pesticide production has been growing steadily, albeit at a mild pace in Jan.–May XXXX. During the first half of XXXX, the total import and export volume registered a decline of X.XX% year on year while the exports have increased slowly since May. In HX XXXX, the monthly value total of exports of China's pesticide achieved varying degrees of growth, especially that of herbicides; the ex-works prices of pesticide technical stood relatively lower than the highs in late XXXX. In XXXX, it is expected that market would be fluctuated slightly in the near future.

#### 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 Regional measures and effects amid the COVID-19 pandemic

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Table 1.2-1 Regional measures against the COVID-19 pandemic in China

Time	Province/Region	Regional measures	Results
Feb.–April XXXX	XXXXX XXXXX XXXXX XXXXXXXXXX	<ol style="list-style-type: none"> <li>XXXXX XXXXXXXXXXXXXXXX XXXXXX XXXXXX XXX XXXX XXXXXXXXXX XXXXXXXXXXXXX</li> <li>XXX XXXXXXXXXXX XXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXXXXXX XX XXXXXXXXXXXXXXXXXX</li> <li>XXX XXXXXXXXXXXXXXXX XXXXXXXXXX</li> </ol>	<ul style="list-style-type: none"> <li>XXXXXXXXXX XXXXXXXXXXXXX XXX XXXXXXXXXX</li> <li>XXXXXX XXXX XXXXXXXXX XXXXXXXXXX XX XXXXXXXXXXXXX XXXXXXXXXX XXX XXXXXXX XXXXXX XXX XXXXX XX XXXXXXXXXXXXXXXXXX XX XXXXXXX XX X XXXX</li> </ul>
XXXX XXXX	XXXXX XXXXXXXXXXXXX Heilongjiang XXXXXXXXXXXX XXXXXXX	<ol style="list-style-type: none"> <li>XXXX XXXXXXXXXXX XXX XXXXXXXXXX XXXXXXXXX X XXXXXX XXXXXX XX XXXX XXX XXXXXX XXXXXX XX XXXX XX X XXXXXXXXXX XXXXXXXXX XXXXXXXXX XXXX XXXXXXXXX XXXXXXXXX</li> <li>XXXX XXXX XXXXXXXXX XX XXX XXXXXXXXXX XXXXXXXXX XXXX XX XXXXXXXXXX XXXXXXXXX</li> <li>XXXXXX XXXXXXXXXXX XXXX XXXXXXXXXX XX XXXXXXXXXXXXX XXXXXXXXXXXXXXXXXX</li> <li>XXXXXXXXXX XXXX XXXXXXXXXXXXXXXXXXXX XXXXX XXXX XXXXXXXXX XXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXX X XXXXXX XXXX XXXXXXXXXXXXXXX</li> </ol>	<ul style="list-style-type: none"> <li>XX XXX XXXXX XXXXXXX XXXXXXXXXXXX XXXXXXXXX XX XXXXXXXXXX XXX XXXX XXXX XXXXXXXXXX</li> <li>XX XXXXX XXXXXX XXX XXXXXXX XXXXXXXXXX XXXXXXXXXXXXXXX XX XXXXXXXXXXXX XXXXXXXXX XXX XXXXXX XXXXX XXXXXXXXX XX XX XXXXXX XXX XXXXXXXXXXX XXXX XXX XXXXXXXXXXXXXXX XXXXXXXXX</li> </ul>
XXXX XXXX	XXXXXXXX XXXXX XXXXXXXX XXXXXXXXXXXXX Yangzhou XXXXX XXXXXXXX XXXXXXXXX	<ol style="list-style-type: none"> <li>XXXXXX XX XXXXXXXXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXXX XXX XXXXXXXXXXXXX XX X XXXXXXX XXXXXX</li> <li>XXX strengthen the XXXXXXXXX XXXXXXXXXX in Yangzhou XXXXX</li> </ol>	<ul style="list-style-type: none"> <li>XXXXXXXXXXXXXXXXXXXX XXXXXXX XX XXXX XXXXX XX XXXXXXX XXXXXXXXXXXX</li> </ul>
XXXX	XXXXXXXX XXXXX XXXXX	<ol style="list-style-type: none"> <li>XXXXXX XXXXXXXXX XXXXXXXXXXXXX</li> </ol>	<ul style="list-style-type: none"> <li>XXXXXXXX XXXXXXXXX</li> </ul>



XXXX	XXXXXXXXXX Dalian XXXXX XXXXXXXXXX XXXXXXXXXXXX Zhuhai X XXXXXXXXXXXX X XXXXXXXX XXXXXXXX XXXXXXXXXX XXXXXXXX	2. XXXX XXXXXXXXXXXX XX XXXXX XXXXX 3. XXXXXXX XXX XXXXXXXX XXXXXXXXXXXX XXXX XXXXXXXXXXXX XXX XX X May-31 XXXXX	XXXXXXXXXX XX XX XXXXXXXXXXXXXXXXXXXXX XX XXXXX XXXXXXX Jan.-May XXXXX • XXXXXXX exports improved—the XXXXX XXXXXXX XXXXXXX XX XXXXXXXXXXXX XXXXXXX XXXXX XX XXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXXXXXX XXXX XXXXXXXXXXXX XX XXXX
XXXXX XXXX	XXXXXXXXXX XXXXXXXXXXXXXXXXXXXX Tianjin XXXXXXXXXXXXXXXX Changchun XXXXX XXXXX XXXXXXXX	4. XXXXX XXXXXXXXXXXX XXXXXXX XXXXXXXX XXXX XXXXX XXXXXXXXXXXX XXX XXXXXXXXXX 5. XXXX XXXXXXXX XXXXXXX XXXX XXXXXXX XXXXXXX XXX XXXXX XXXXXXX XX XXXXXXX	
XXXXX XXXX	XXXXXXXXXX XXXXXXXXXXXXXXXXXXXX		

Source:CCM

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## 2.1 Imports and exports of China's pesticides by volume

In HX XXXX, the import and export volume of China's pesticides, such as herbicide, insecticide and fungicide, aggregated XXX,XXX.XXX tonnes, down by X.XX% year on year—XX% (=XXX,XXX.XXX tonnes) were exported.

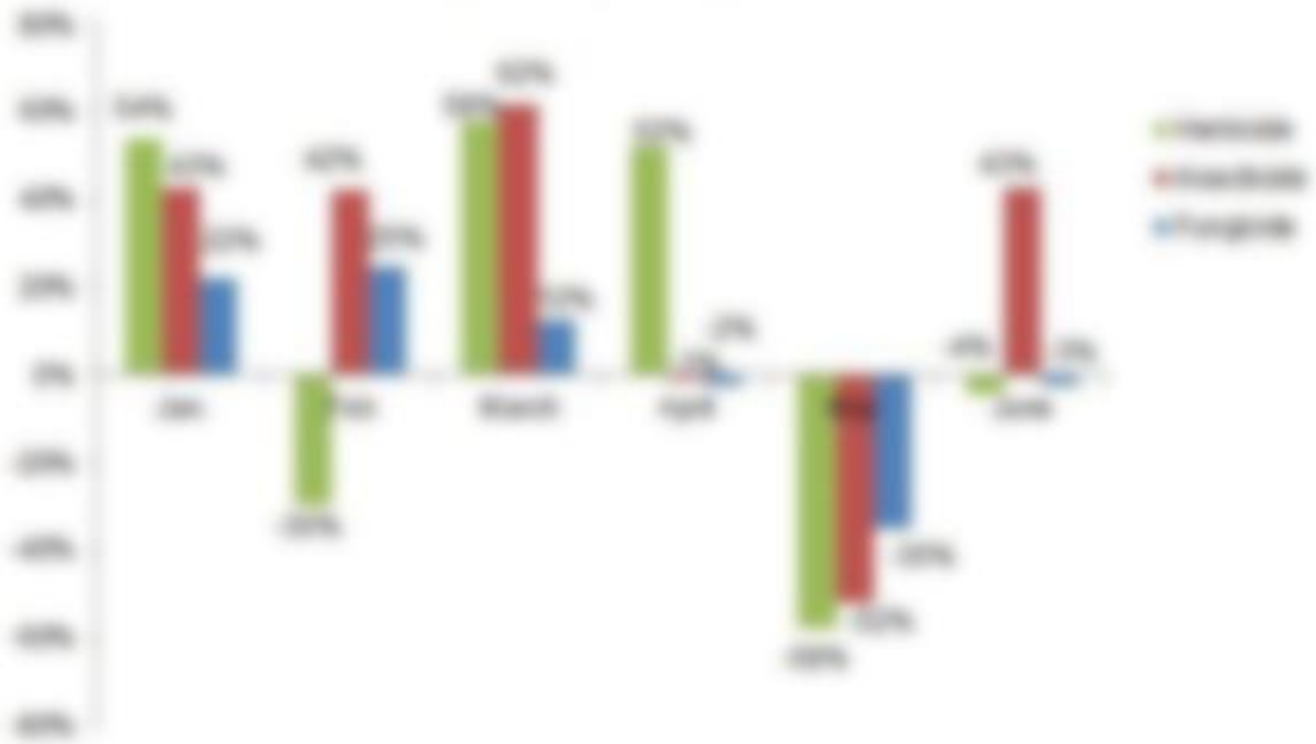
Compared with the same period last year, the import volume of pesticide witnessed growths in Jan. and March, but large decreases in other months; for exports, the volume showed a substantial decline in Feb.–April, yet rebounded slowly in May and June, up by XX.XX% and XX.XX% YoY, respectively.

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## 2.2 Imports and exports of China's pesticides by value

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Figure 2.2-1 Imports value of pesticides, H1 2022 vs H1 2021



Source: China Customs and CCM

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### 3.1.1 Glyphosate

According to CCM's price monitoring, the monthly ex-works price of XX% glyphosate technical in HX XXXX indicated a near XX% decline from USDXX,XXX/t in Jan. to USDX,XXX/t in June, partially due to the reduced cost of yellow phosphorus. The price of glyphosate is expected to remain high for full XXXX, with the low ready stock and limited new capacity launching to the market amidst strong demands.

Regarding the operating rate in China, glyphosate technical manufacturers reported stable operation in general. Notably, Hubei Xingfa Chemicals Group Co., Ltd., located in Hubei Province, has recovered its operation from hit by COVID-XX outbreak in QX XXXX, to XX% on average.

...

Table 3.1.1-1 Operating rates of 5 major glyphosate technical manufacturers in China, Jan.–June 2022

Manufacturer	Operating rate					
	Jan.	Feb.	March	April	May	June
XXXXXXXX XXXX XXXXXXXX XXXXX XXXX XXXX	XXX	XXX	XXX	XXX	XXX	XXX
XXXXXXXX XXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXX	XXX	XXX	XXX	XXX	XXX
XXXXXXXX XXXXXX XXXXX XXXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXX	XXX	XXX	XXX	XXX	XXX
XXXXXXXX XXXXXXXXXXX XXXXXXXXXXXXXXX XXX XXXXXXXXXXXX XXXX XXXX	XXX	XXX	XXX	XXX	XXX	XXX
XXXXX XXXXXX XXXXXXXXXXX XXXXX XXXX XXXX	XXXXXXXX XXXX	XXX	XXX	XXX	XXX	XXX

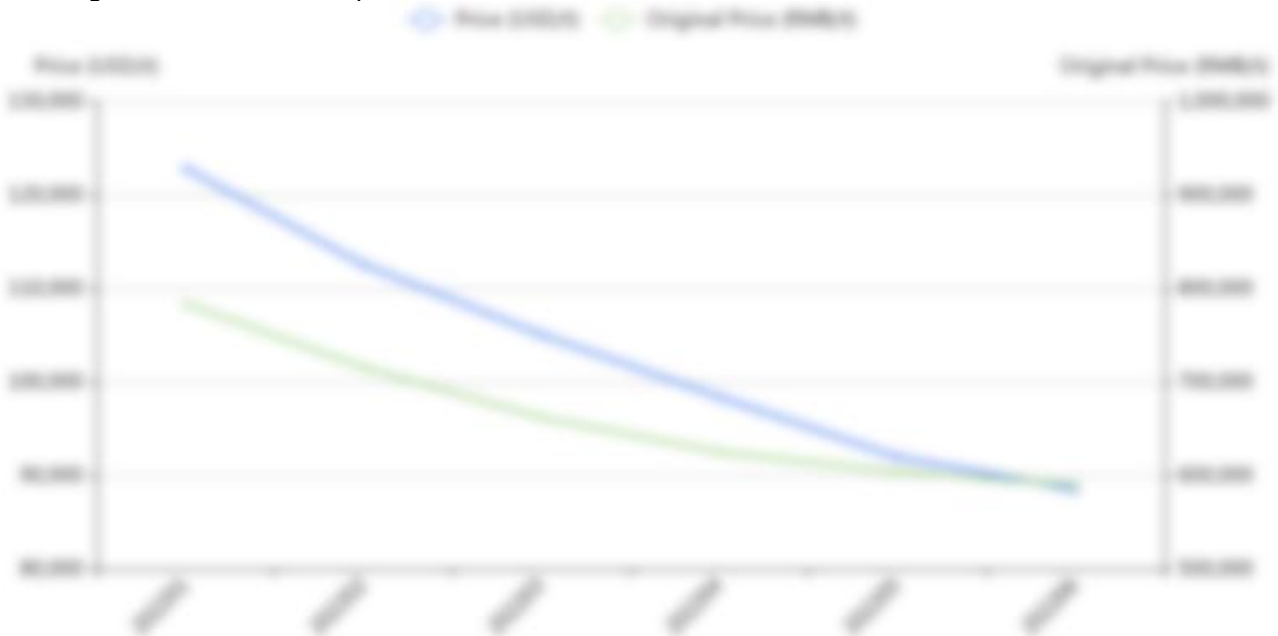
Source:CCM

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### 3.2.3 Emamectin benzoate

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Figure 3.2.3-1 Ex-works prices of 70% emamectin benzoate technical in China, Jan.–June 2022



Source:CCM

Table 3.2.3-1 Operation status of 3 major emamectin benzoate technical manufacturers in China, Jan.–June 2022

Manufacturer	Operation status					
	Jan.	Feb.	March	April	May	June
XXXXXX XXXXXX XXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX
XXXXX XXXXXXXXX XXXXX XXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX
XXXX XXXXX XXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX	XXXXXXXXXXXXXX

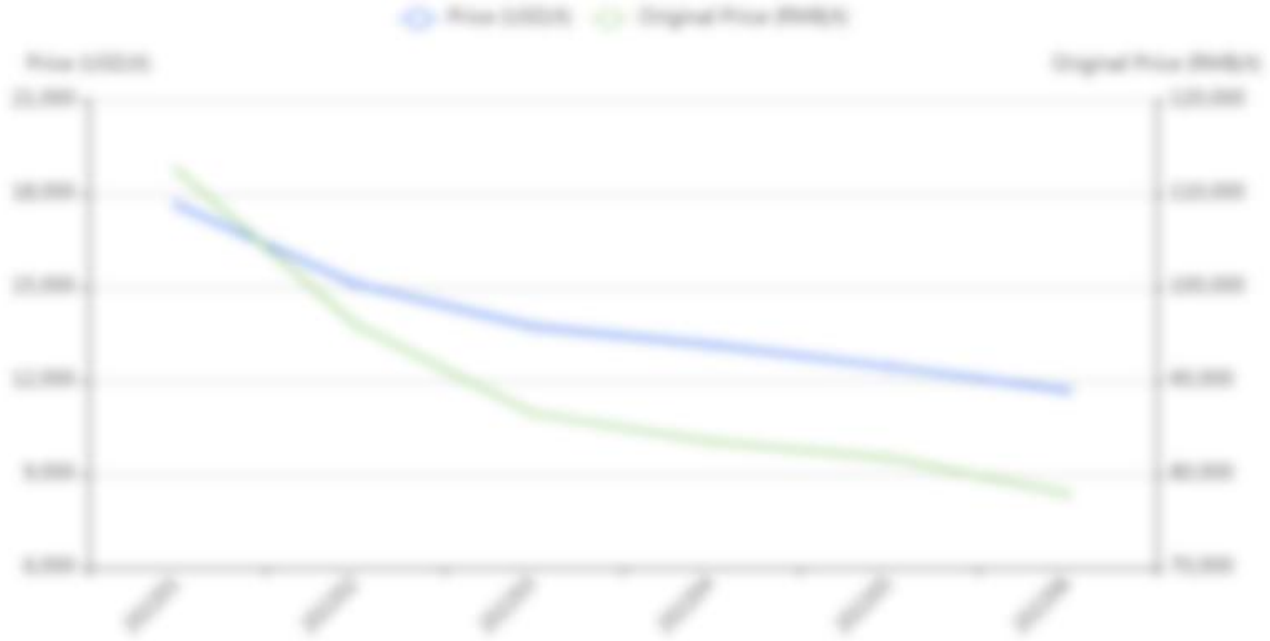
Source:CCM

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### 3.3.1 Tebuconazole

The operation of Chinese manufacturers of tebuconazole technical in Jiangsu Province, the main production area in the country, has run smoothly in HX XXXX. However, the ex-works price of this product was down from the hikes in Oct.–Nov. XXXX pulled by sluggish demand. According to CCM's price monitoring data, the ex-works price of XX% tebuconazole technical was USDXX,XXX/t in June, down by X.XX% year on year.

Figure 3.3.1-1 Ex-works prices of 97% tebuconazole technical in China, Jan.–June 2022



Source:CCM

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### 3.3.2 Azoxystrobin

In June, the price of XX% azoxystrobin technical marked a X.XX% year-on-year growth to USDXX,XXX/t.

In Jan.–Feb., the market supply of azoxystrobin technical was affected by logistics disruption induced by the COVID-XX pandemic. Starting from March, China's azoxystrobin technical manufacturers managed to fulfill the increasing foreign orders as transport and ports reopened. Estimates of the price of this product hover around USDXX,XXX/t in HX XXXX.

Figure 3.3.2-1 Ex-works prices of 96% azoxystrobin technical in China, Jan.–June 2022



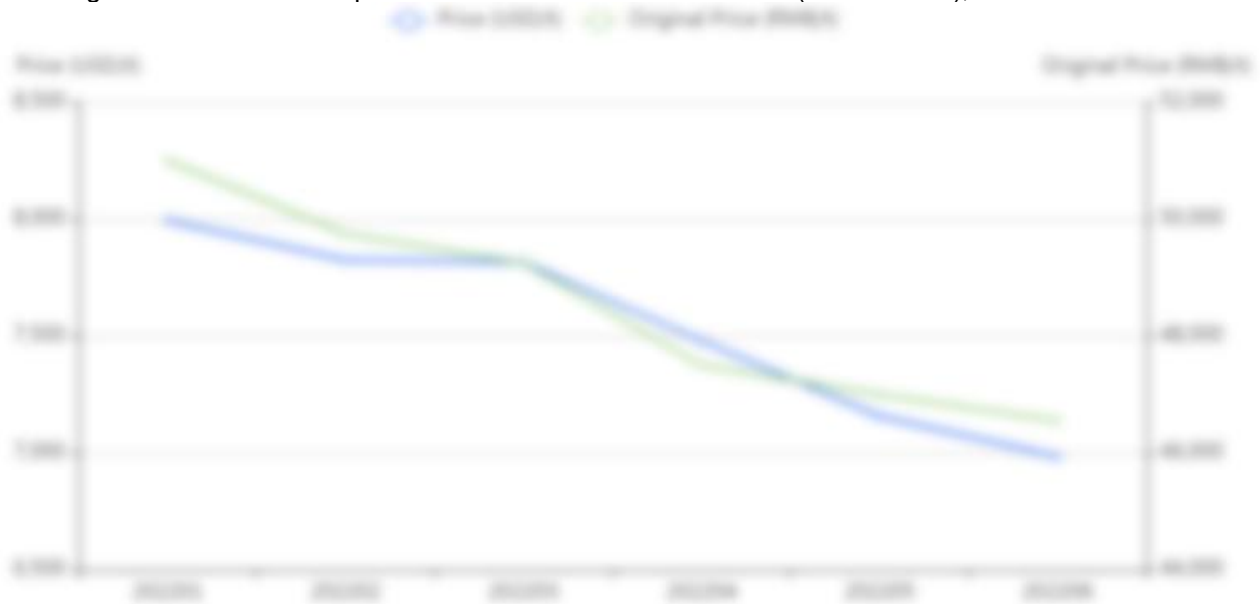
Source:CCM

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### 3.3.3 Carbendazim

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Figure 3.3.3-1 Ex-works prices of 98% carbendazim technical (White colour), Jan.-June 2022



Source:CCM

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#### 4.4 Zhejiang Province

Zhejiang Province's production of pesticide technical had been growing over recent years, accounting to XXX,XXX tonnes in XXXX, XXX,XXX tonnes in XXXX and XXX,XXX tonnes in XXXX. Although its QX output of XXXX was reported XX,XXX tonnes, down X.XX% YoY due to the spread of Delta and Omicron variants, Zhejiang Province is expecting a better performance in the coming months given some COVID-XX-related restrictions were lifted in April.

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#### 4.5 Anhui Province

Effectively taming the COVID-XX epidemic, Anhui Province has resumed local production activities in QX XXXX with total output of pesticides continued rising up by XX.XX% YoY to XX,XXX tonnes—such growth followed the XXXX and XXXX provincial output tallies which were up by XX% and XXX% respectively compared with the total of XXXX.

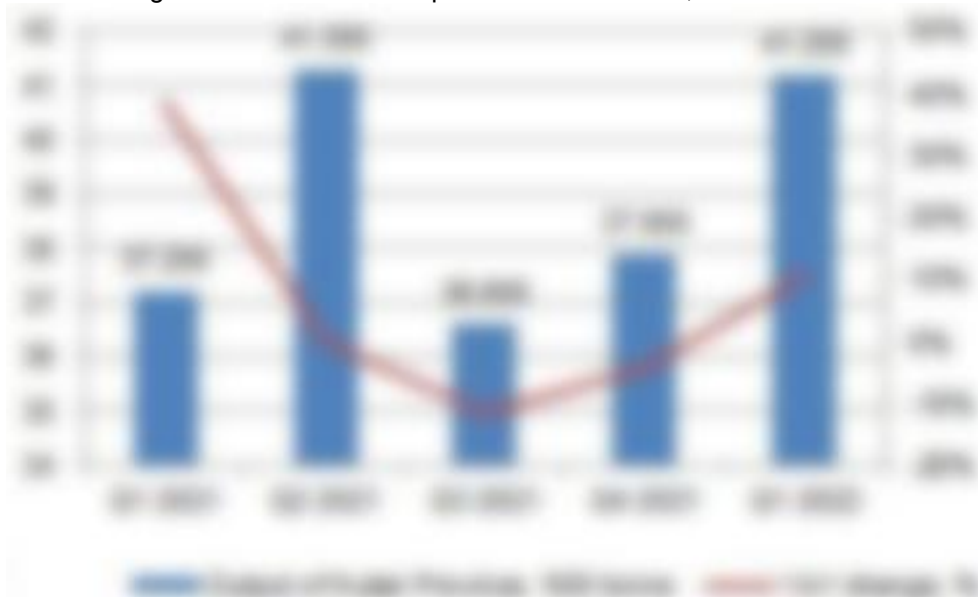
The province implementing the inter-regional transport permit system for easier road transport during the pandemic period has benefited the local pesticide businesses, such as Anhui Guangxin Agrochemical Co., Ltd., Anhui Jintudi Biotechnology Co., Ltd., Anhui Jukai Agrochemical Co., Ltd.

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#### 4.6 Hubei Province

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Figure 4.6-1 Pesticide output of Hubei Province, 2021–Q1 2022



Note: Output is based on 100% active ingredient

Source:CCPIA and CCM

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