

# Top 100 Pesticide Enterprises in China

The seventh Edition

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**Researched & Prepared by:**

**Kcomber Inc.**

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## 1. Introduction

With the intensification of industry competition and the increasing pressure on environmental protection and safety, China's pesticide industry has entered a new round of integration period. The merger and reorganization of the pesticide industry continued, and the industry concentration was further improved. In 2020, due to the continuous improvement of environmental protection in eastern China, the pesticide industry was transferred from Jiangsu Province, Zhejiang Province and Hebei Province to areas with large quantities of resources and energies. At present, the overall development of pesticides in China has ushered in a special period with management standardization, product optimization, industry integration and upgrading. For the whole industry, on the one hand, the overall level of China's pesticide industry should be improved through the development of new technologies and application of new products. On the other hand, it is necessary to avoid re-construction of low-end production capacity and re-registration of low-end products, to ensure the high-quality development of the industry.

In 2020, the pesticide industry was in an unfavorable situation, facing disadvantages such as the COVID-19 pandemic and ensuing trade risks, agricultural production reduction by bad weather, and disruptions to the pesticide supply chain. Though faced with the severe market situation, 72 companies achieved increases in sales revenue over 2019. Learning from the List of 2021 China Top 100 Pesticide Enterprises, the sales growth rate of these enterprises has accelerated significantly. Compared with the technical manufacturers, the average scale of enterprises in formulation industry was still small, but the overall sales level has increased significantly with better performance.

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

Review of China's pesticide industry in 2020

Top pesticide enterprises in China

Top pesticide formulation enterprises in China

Top crop protection brands in China in 2020

## 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.

Table Abbreviations and full names

### 3. Executive summary

In XXXX, with comprehensively strengthened pesticide management, China's pesticide industry continued the shift from high-speed development to environmental friendly and high-quality development. Despite huge blow of the COVID-XX outbreak in QX XXXX, the pesticide industry still quickly overcame difficulties and maintained a steady and sound development. The transformation and upgrading has achieved remarkable results in the industry, the process of merger and reorganization has been accelerated, and the industrial concentration has been significantly improved. Pesticide enterprises have made new progress in scientific and technological innovation, and continuously launched new varieties independently developed. The competitiveness of China's pesticide products has been continuously enhanced, and the export proportion of technical and formulation has been improved.

List of XXXX China Top XXX pesticide enterprises, XXXX China Top XXX pesticide formulation enterprises and popular pesticide brands (by sales) in China in XXXX, selected by the CCPIA, were disclosed in the Xth Analysis Meeting of Economic Operation in Pesticide Industry on XX May, XXXX. In general, both total revenue and the entry threshold of top XXX pesticide enterprises in XXXX have increased over XXXX. Moreover, the sales of the top XX accounted for about XX% of the total, which means industry concentration increased significantly. Compared with the technical enterprises, the scale of formulation enterprises was small on average, but their development was good overall. In the list of popular pesticide brands, the pesticide varieties with high efficiency, low toxicity and low residue increased, and the proportion of environmentally friendly formulation products rose.

With intensifying competition and rigorous enforcement of environmental protection measures, China's pesticide industry has entered a new round of integration, which also puts forward higher requirements on domestic pesticide enterprises. These enterprises have been trying to improve themselves to adapt to the new environment, as they are aware that only by continuously improving product quality, services and creativity, and by enhancing scientific and technological strength can they maintain advantages in pesticide industry.

The USD/CNY exchange rate in this newsletter is USDX.XX=RMBX.XXXX on X Aug. XXXX sourced from the People's Bank of China.



## 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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### 1.1 General situation

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In general, main economic indicators of the pesticide industry still maintained growth, even though some enterprises failed to operate normally due to the aftermath of COVID-XX.

With the supply-side structural reform and enterprises' transformation and upgrading, concentration ratio of China's pesticide industry continued to increase. In XXXX, there were XXX enterprises above designated size involved in pesticide business in China, XX less than the number in XXXX and XXX less than XXX in XXXX. Although the number decreased, the total assets and revenues from main business have increased steadily, and the economic benefits they generated were remarkable. According to data from the National Bureau of Statistics, in XXXX, the assets of the XXX pesticide enterprises totaled USDXX.XX billion (RMBXXX.XX billion), with a year-on-year increase of X.XX%; the main business revenue together reached USDXX.XX billion (RMBXXX.XX billion), a year-on-year increase of X.XX%; the total profit was USDX.XX billion (RMBXX.XX billion), up by X.XX% year on year; the total profit of chemical pesticide technical increased by X.XX% year on year, while that of biochemical and microbial pesticides decreased by X.X% over XXXX.

It is worth noting that due to the increased cost of raw materials under the influence of the global epidemic and China's rigorous enforcement of environmental protection measures, production cost in pesticide enterprises went up. Although product price increased accordingly, profit margins were still squeezed, which slowed down the growth of total profit of these enterprises above designated size.

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Since XXXX, with the implementation of the policy "achieving zero growth in the use of chemical fertilizers and pesticides by XXXX", as well as the phasing out of highly toxic organophosphorus pesticides (insecticides in majority), the total output of pesticides has decreased steadily. Data from the National Bureau of Statistics show that in XXXX, the output of chemical pesticide technical (converted into XXX% AI, hereinafter) of enterprises above designated size in the pesticide industry was X.XX million tonnes, with a year-on-year decrease of X.XX%. Thereinto, the output of herbicide, insecticide and fungicide was XX.XX%, XX.XX% and X.XX% of the total respectively.

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As to pesticide production in different provinces, the top three in pesticide technical output in XXXX are Jiangsu Province, Shandong Province and Sichuan Province, the trio accounting for XX.XX% of the domestic total, according to the data from the National Bureau of Statistics.

Jiangsu Province, as the largest pesticide producer in China, saw its pesticide technical output decrease by X.X% year on year, as relocation, shutdown & rectification in chemical enterprises have accelerated, which is prompted by environmental protection, work safety improvement and industrial structure adjustment in chemical parks. While Shandong Province and Anhui Province had their pesticide technical output rose by XX.XX% and XX.XX% year on year respectively, driven by continuous and effective release of production capacity and increasing demand for some products. Besides, Hunan Province, Gansu Province and Ningxia Hui Autonomous Region also experience fast growth in pesticide technical output, mainly due to effective release of new production capacity. In contrast, owing to the shutdown caused by floods in QX XXXX, Sichuan Province witnessed a XX.XX% slump in its pesticide technical output. Hubei Province, Hebei Province, Guangxi Zhuang Autonomous Region and Guangdong Province also experienced output drops, down by XX.XX%, XX.XX%, XX.XX% and XX.XX% respectively.



Table 1.1-1 Output of pesticide technical in China by region in 2020, '000 tonnes

XXXXXX	Output (converted into 100% AI)	YoY change
XXXXXXXXXXXXXXXX	XXX	XXXXXX
XXXXXXXXXXXXXXXX	XXX	XXXXXX
XXXXXXXXXXXXXXXX	XXX	XXXXXXX
XXXXXXXXXXXXXXXX	XXX	XXXXXX
XXXXX XXXXXXXXX	XXX	XXXXXX
XXXXX XXXXXXXXX	XXX	XXXXXXX
XXXXX XXXXXXXXX	XXX	XXXXXX
XXXXX XXXXXXXXX	XX	XXXXXX
XXXXX XXXXXXXXX XXXXXXXXXXXX XXXXXX	XX	XXXXXX
XXXXX XXXXXXXXX	XX	XXXXXXX
XXXXXXXX XXX XXXXXXXXXXXX XXXXXXX	XX	XXXXXX
XXXXX XXXXXXXXX	XX	XXXXXXX
XXXXXXXX XXXXXXX XXXXXXXXXXXX XXXXXX	XX	XXXXXXX
XXXXXXXXXXXX XXXXXXXXX	XX	XXXXXXX
XXXXXX	XX	X
XXXXX	XXXXX	XXXXXX

Source: National Bureau of Statistics

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## 1.2 Imports and exports

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As operating rates of overseas pesticide enterprises were damaged by COVID-XX, strong demand for China's pesticides was witnessed, and the export volume & value went up significantly in XXXX. According

to the data from the National Bureau of Statistics, China exported X.XX million tonnes of pesticides, with a yearly increase of XX.XX%; the export value was USDX.XX billion, up by XX.XX%.

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Table 1.2-1 Import volume and value of pesticides in China, 2020

Category	Import volume (converted into 100% AI), '000 tonne	YoY change	Import value, million USD	YoY change
XXXXXXXXXX	XXX	XXXXXX	XXX	XXXXXX
X XXXXXXXXXXX	XX	XXXXXX	XX	XXXXXX
X XXXXXXXXXXXXX	XX	XXXXX	XXX	XXXXXX
X XXXXXXXXXXX	XX	XXXXXX	XXX	XXXXXX

Source: CCM & National Bureau of Statistics

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## 2.1 2021 China Top 100 pesticide enterprises

In XXXX, the pesticide industry was in an unfavorable situation, facing disadvantages such as the COVID-XX pandemic and ensuing trade risks, agricultural production reduction by bad weather, and disruptions to the pesticide supply chain. At the same time, with implementation of new regulations and policies concerning pesticide management, pesticide industry has entered a high-quality development stage. Pesticide enterprises paid more attention to environmental protection and work safety, energy consumption reduction and product innovation. Small enterprises withdrew from the market, and the industry concentration increased significantly. For example, Jiangsu Province have stepped up industrial regulation, and pesticide production capacity has been gradually transferred to the central and western China. China's pesticide utilization rate improved continuously. It was obvious that high-efficient and low-toxic pesticides got on the fast lane of development.

Though faced with the severe market situation, XX companies achieved an increase in sales revenue over XXXX and most of these enterprises had significant growth in sales. Statistics show that the total sales of the top XXX enterprises on the list reached USDXX.XX billion (RMBXXX.XX billion), with a yearly increase of XX.XX% (the figure of the previous year was X.XX%). In XXXX, the entry threshold of top XXX enterprises rose to USDXX million (RMBXXX million), up XX.XX% from the previous USDXX million

(RMBXXX million).

Among the listed companies, the top ADAMA Ltd. had sales of more than USDX.XX billion (RMBXX billion). Following its lead, other X enterprises had sales over USDXXX million (RMBX billion), two more than last year. XX enterprises achieved sales within the range of USDXXX million to USDXXX million (RMBX billion–RMBX billion).

The top XX enterprises raked in USDXX.XX billion (RMBXX.XX billion) in pesticide business, up by XX.XX% over the previous year, accounting for XX.XX% of the total sales on the list. This shows that the market concentration of China's pesticide industry is relatively high, and the leading enterprises have played a significant role.

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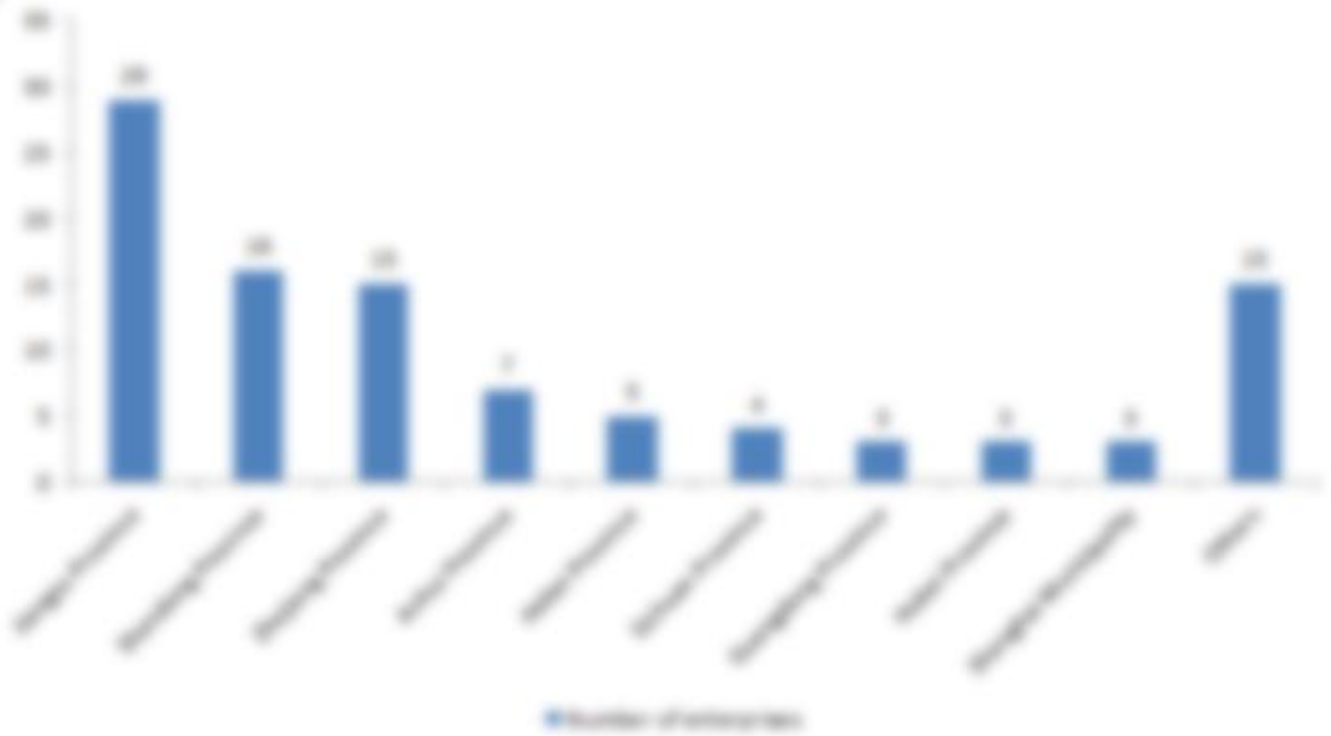
Table 2.1-1 Newly added pesticide enterprises in the 2021 list

No.	Enterprise	Pesticide revenue in 2020, million USD	Pesticide revenue in 2020, million RMB	Ranking
X	XXXX XXXXXXXXXXXXXXXX XXXXXX XXXXXXXXXX XXXX XXXX	XXXXXX	XXX	XX
X	XXXXXXXX XXXXXXXX XXXXXXXX XXXX Ltd.	XXX	XXX	XX
X	XXXXXXXX XXXX XXXX XXXXXXXX XXXX XXXX	XXX	XX	XX
X	XXXXXXXX XXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXX	XX	XX
X	XXXXX XXXXX XXXXXXXXXXXXXXXX XXXXX XXXX XXXX Ltd.	XXX	XX	XX
X	XXXXX XXX XXXXXXXXXXXX XXXX XXXX	XXX	XX	XX
X	XXXXXXXXXX XXXXXXXX XXXX XXXX	XXX	XX	XX
X	XXXXX XXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXX	XX	XXX

Source:CCPIA & CCM

2.2 Geographical distribution of 2021 China Top 100 pesticide enterprises

Figure 2.2-1 Number of 2021 Top 100 pesticide enterprises in China by region, 2020



Source:CCPIA & CCM

Table 2.2-1 Revenue of 2021 China Top 100 pesticide enterprises by region, 2020

No.	XXXXXX	Pesticide revenue in 2020, million RMB	Pesticide revenue in 2020, million USD
X	XXXXXXXXXXXXXXXXXX	XXXXXX	XXXXX
X	XXXXX XXXXXXXXX	XXXXXX	XXXXX
X	XXXXXXXXXX XXXXXXXXX	XXXXXX	XXXXX
X	XXXXXXXXXX XXXXXXXXX	XXXXXX	XXXXX
X	XXXXXXXX XXXXXXXXXXXXX	XXXXXX	XXXXX
X	XXXXXXXX XXXXXXXXX	XXXXXX	XXXXX
X	XXXXXX XXXXXXXXX	XXXXX	XXXXX
X	XXXXXXXXXX XXXXXXXXX	XXXXX	XXXXX
X	XXXXXX XXXXXXXXX	XXXXX	XXX
XX	XXXXXXXX XXXXXXXXXXXXX	XXXXX	XXX
XX	XXXXXXXX XXXXXX XXXXXXXXXXXXX XXXXXX	XXXXX	XXX
XX	XXXXXX XXXXXXXXX	XXXXX	XXX
XX	XXXXXX XXXXXXXXXXX XXXXXXXXXXXXX XXXXXX	XXXXX	XXX
XX	XXXXXXXX XXXXXXXXX	XXXXX	XXX
XX	XXXXXXXX XXX XXXXXXXXXXXXX XXXXXX	XXXXX	XXX
XX	XXXXXX XXXXXXXXX	XXXXX	XXX
XX	XXXXXXXXXX XXXXXXXXXXXXX	XXX	XXX
XX	XXXXXXXX XXXXXXXXX	XXX	XX
XX	XXXXXX XXXXXXXXX	XXX	XX
	XXXXX	XXXXXXXX	XXXXXX

Source:CCPIA &amp; CCM

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### 3.1 2021 China Top 100 pesticide formulation enterprises

In XXXX, pesticide industry entered a high-quality development stage, and the effect of industry transformation and upgrading was prominent. Enterprises in the XXXX Top XXX List for pesticide formulation business achieved total revenue of USDX.XX billion (RMBXX.XX billion), with a yearly increase of XX.XX%. Sales threshold for the Top XXX list this year was USDXX million (RMBXXX million).

Sales of the top XX companies altogether approached USDX.XX billion (RMBXX.XX billion), accounting for XX.XX% of the total, with an increase of XX.XX% over the previous year. It is worth noting that X companies achieved sales of more than USDXXX million (RMBX billion), one more than the XXXX. There are XX enterprises with sales between RMBXXX million and RMBX,XXX million (approximately within the range of USDXX million–USDXXX million), and the rest XX enterprises with sales between RMBXXX million and RMBXXX million (within the range of USDXX million to USDXX million). On the whole, compared with the technical manufacturers, the average scale of enterprises in formulation business is still small, but the overall sales performance has increased significantly.

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Table 3.1-1 List of 2021 China Top 100 Pesticide Formulation Enterprises

No.	Enterprise	XXXXXXXX XX revenue in 2020, million RMB	XXXXXXXX XX revenue in 2020, million USD	XXXXXXXX XX revenue in 2019, million RMB	XXXXXXXX XX revenue in 2019, million USD	YoY change	Ranki ng in 2019	Ranking change	Ranking in the list of 2020 China Top XXX XXXXXXXX X Enterprises
X	XXXXXXXXXX XXXXXXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXXXXX	XXX	XXXXXX	XXX	XXXXXXX	X	X	XX
X	XXXXXXXXXX XXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX	XXXXXX	XXX	XXXXXX	XXX	XXXXXXX	X	X	XX
X	XXXXXXX XXXXXXXXXX XXXX XXXXXXXXXXXX XXXX XXXX	XXXXXX	XXX	XXXXXX	XXX	XXXXXXX	X	X	XX
X	XXXXXXX XXXXXXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXXXXX	XXX	XXXXXX	XXX	XXXXXXX	X	XX	XX
X	XXXXXXXX XXXXX XXXXXXXXXX XXXX XXXX	XXXXXX	XXX	XXXXXX	XXX	XXXXXXX	X	XX	XX
X	XXXXXXXXXX XXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXX	XXX	XXX	XXX	XXXXXXX	X	X	XX
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XX	XXXXXXXXXX XXXXX XXXXXXXXXX XXXX XXXX	XXX	XXX	XXX	XXX	XXXXX	XX	XX	X
XX	XXXXXXX XXXXXXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXX	XXX	X	X	X	X	X	XX
XX	XXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXXXXX XXXX XXXX	XXX	XXX	XXX	XXX	XXXXX	XX	X	XX
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XX	XXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXX XXXX Ltd.	XXX	XX	XXX	XX	XXXXXX	XX	X	X



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XX	XXXX XXXXXXXX XXXXXXXXXX XXXXXXXXXXXXX XXXX Ltd.	XXX	XX	X	X	X	X	X	X
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XX	XXXXXXXX XXXXXXXX XXXXXXXX XXXXXXXX XXXX XXXX	XXX	XX	XXX	XX	XXXXXX	XX	X	X
XX	XXXXXXXX XXXXXXXX XXXXXXXX XXXX XXXX	XXX	XX	XXX	XX	XXXXX	XX	XXX	X
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XX	XXXXXXXX	XXX	XX	X	X	X	X	X	X

	XXXXXXX XXXXXXXXXXXXXX XXXX XXXX								
XX	XXXXX XXXX XXXXXXXXXXXXXX XXXX XXXX	XXX	XX	XXX	XX	XXXXX	XX	X	X
XX	XXXXXXX XXXXXXXXXXXX XXXXX XXXXXXXXXXXX XXXX XXXX	XXX	XX	X	X	X	X	X	X
XX	XXXXXXXXX XXX XXXXX XXXXXXXXXXXXXX XXXX XXXX	XXX	XX	XXX	XX	XXXXX	XX	XX	X
XX	XXXXXXXXX XXXXXX XXXXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXXX	XXX	XX	X	X	X	X	X	X
XXX	XXXXXXX XXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXXX XXXX	XXX	XX	XXX	XX	XXXXXX	XX	XX	X

Source:CCPIA & CCM

Note:Shandong Kesai Agrochem Co., Ltd. (No. 12 in this list), is a wholly-owned subsidiary of Shandong Kesai Agrochem Holdings Co., Ltd., which ranked 61 in the list of 2021 China Top 100 pesticide enterprises.

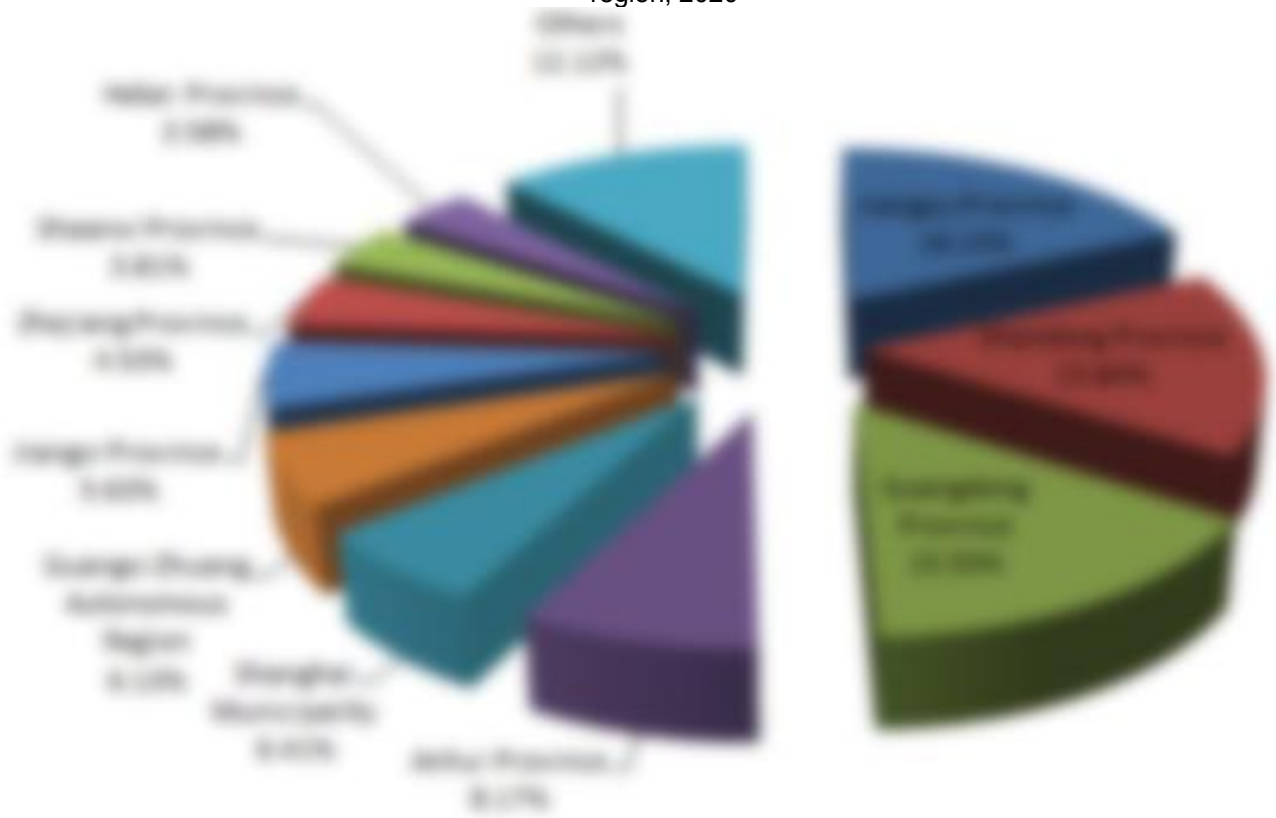
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### 3.2 Geographical distribution of 2021 China Top 100 pesticide formulation enterprises

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 second. Guangdong Province ranked the third, with only X companies on the list and the revenue of USDX.XX billion (RMBX.XX billion). It's worth noting that the companies ranking first and second in the list are both from Guangdong Province.

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Figure 3.2-1 Share of pesticide revenue of 2021 China Top 100 pesticide formulation enterprises by region, 2020



Source:CCPIA & CCM

#### 4 Top crop protection brands in China in 2020

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Table 4-1 List of 2020 China Crop Protection Blockbuster Possible Products

No.	Enterprise	Product	Brand
X	XXXX XXXXXXXX XXXX XXXX	XXXXXXXXXXXXXXXX XXXXX XX	XXXXXXXXXX
X	XXXXXX XXXXXX XXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXXXXXXXXXXXX XXX XX	XXXXXXXXXXXX
X	XXXXXXXX XXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	28-Homobrassinolide-Gibberellic XXXX XXX XX XXXX XX	XXXXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXXXXXXXX XXX XX	XXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXX XXXX XXXX	Fluoroglyphofen-ethyl-Glufosinate-ammonium XXX XX	XXXXXXXXXXXXXXXX
X	XXXXXX XXXXXXXXXXX XXX XXXXXXXXXXXX XXXXX XXXX XXXX	Flumorph-Cyazofamid XXX XX	XXXXXXXXXXXXXXXX
X	XXXXXX XXXXXXXX XXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXXXX XXX XX	XXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXX XXXXX XXXX XXXX	XXXXXXXXXXXX XXX XX	XXXXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXXXXX XXXXXXXXXXXX XXXX XXXX	Beta-cypermethrin-Pyriproxyfen XXX XX	XXXXXXXXXX
XX	XXXXXXXX XXXXXXXXXXX XXXX XXXXXXXXXXXX XXXX XXXX	Abamectin-aminomethyl-Tolfenpyrad XXXXX XX	XXXXXXXXXX
XX	XXXXXXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXX XXXXX XXXX XXXX	Dinotefuran-Thiamethoxam XXX XX	XXXXXXXXXXXX
XX	XXXXXXXXXXXX XXXXXXX XXXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXXXX XX XX	XXXXXXXXXXXX

XX	XXXXX XXXXXX XXXXXXXXXXXXXXXX XXXX Ltd.	Kasugamycin·Paenibacillus XXXXXXXX XXXXX XX XX	XXXXXX
XX	XXXXX XXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	Metalaxyl-M·Azoxystrobin XXXX XX	XXXXXXXXXXXXXXXX

Source:CCPIA & CCM

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