

Situation of China's pesticides trade with Ukraine and Russia

The First Edition

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1. Introduction

Since the outbreak of the Russia-Ukraine conflict, the international trade and agricultural production were affected. As the price of the crude oil surged, the high cost of producing some major intermediates has pushed up the production cost of pesticide. In Ukraine, crop yield has been hit hard, affecting the country's demand for China's pesticides; with evaluation on factors like safety and profitability, Chinese enterprises are thinking to slow down pesticide exports to Russia.

China has been an active partner of Ukraine and Russia in trading of pesticides for years. In 2021, China's total trades with Ukraine and Russia saw a yearly increase, up by XXX and XXX, respectively. Regarding to imports from Ukraine, iron ore and agricultural products topped the list by value, while for imports from Russia, energy products led.

In this report, CCM will do analysis of China's pesticides trade with Ukraine and Russia from the following aspects:

- Overview of possible influences from Russia-Ukraine crisis
- Impact on crops and related demand for China's pesticides
- China's import and export with Ukraine and Russia in 2021
- China's major pesticides exported to Ukraine and Russia in 2019-2021
- Outlook for Chinese pesticide technical market under Russia-Ukraine crisis

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.

- 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

The outbreak of conflict between Russia and Ukraine started on XX Feb., has stepped up turbulence in the worldwide commodity markets including crude oil, natural gas and agricultural products, etc., with markups in product prices.

In Jan. XXXX–Sept. XXXX, China exported XX kinds of pesticides to Ukraine and XX to Russia, each accounting for over XX% of the total pesticide exports to major destinations. This month's issue elaborates major pesticide exports to Ukraine and Russia in XXXX-XXXX with details of export price and volume, and major Chinese producers and exporters; five popular pesticide products are taken as examples to show the recent ups and downs in China's pesticide sector since QX XXXX.

Affected by Russia-Ukraine crisis, major fungicides marked great drops in prices; on the other hand, herbicides' prices experienced their ups and downs, but still remaining on the already high positions set since last year. For instance, among over XX destinations around the world, the ex-works price of glyphosate technical dwindled in early XXXX; Ukraine and Russia collectively made up X.XX% of China's total glyphosate exports in XXXX.

As uncertain factors arising from the Russia-Ukraine conflict and fuelling production costs, challenges and new opportunities come on in China's pesticide industry for XXXX.

4. What is in the report?

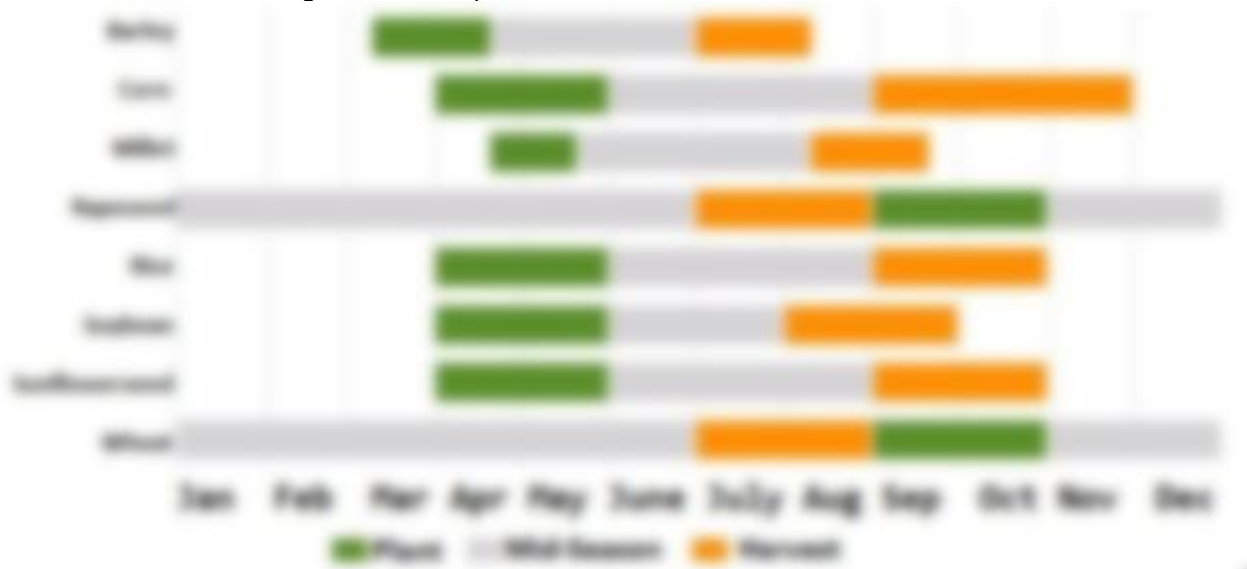
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1.3 Impact on crops and related demand for China's pesticides

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Figure 1.3-1 Crop calendars of Russia and Ukraine



Source:CCM

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1.4 China's major pesticides exported to Ukraine and Russia in 2019–2021

According to the import and export data sourced from Tranalysis, in Jan. XXXX–Sept. XXXX (before the tension), China exported pesticides with XX major active ingredients to Ukraine and XX to Russia, each accounting for over XX% of the total pesticide exports to major destinations (based on XXX% AI volume).

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2.2.1 Top 20 pesticide varieties to Ukraine and Russia by volume

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Table 2.2.1-1 China's top 20 pesticide varieties exported to Russia, Q1–Q3 2021

No.	Product name	Volume (100% AI, tonne)	Unit price (USD/t)
X	XXXXXXXXXX	XXXXXXXXXX	XXXX
X	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
X	XXXXXXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
X	XXXXXXXXXX	XXXXXXXXXX	XXXX
X	XXXXXXXXXX	XXXXXXXXXX	XXXX
X	XXXXXX	XXXXXXXXXX	XXXX
X	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXX
X	XXXXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
X	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXX
XX	XXXXXX	XXXXXXXXXX	XXXX
XX	XXXXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
XX	XXXXXXXXXXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
XX	XXXXXXXXXXXXXX	XXXXXXXXXX	XXXXX
	XXXXX	XXXXXXXXXX	X
	XXXXX	XXXXXXXXXXXXXX	X

Source:Tranalysis

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2.2.3 Top 15 Chinese manufacturers of pesticides to Ukraine and Russia

In QX–QX, XXXX, XX.XX% of the total China's pesticide exports to Ukraine were produced by the top X Chinese pesticide manufacturers—four were located in Zhejiang Province and X in Jiangsu Province. Zhejiang Province contributed the biggest share of XX.XX% of the exports to Ukraine in volume terms.

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As for exports to Russia, above a half of the exported pesticides during the period were manufactured by enterprises located in East China. Specifically, X enterprises in Zhejiang Province and X in Jiangsu Province, accounting for XX.XX% and XX.XX% of the total China's pesticide exports to Russia, respectively.

Zhejiang Wynca Chemical Group Co., Ltd. was the largest manufacturer of pesticides to Russia in QX-QX, followed by Nantong Jiangshan Agrochemical & Chemicals Co., Ltd. and Fuhua Tongda Agro-chemical Technology Co., Ltd. The quantity produced by the top X accounted for XX% of the total.

Table 2.2.3-1 Top 15 Chinese pesticide manufacturers to Russia by volume, Q1–Q3 2021

No.	Manufacture	XXXXX volume (converted to 100% technical, tonne)	Unit Price (USD/kg)
X	XXXXXXXX XXXX XXXXXXXX XXXX XXXX XXXX	XXXXXXXXXX	XXXX
X	XXXXXXXX XXXXXXXX XXXXXXXXXXXXXXX X XXXXXXXXXX XXXX XXXX	XXXXXXXXXX	XXXX
X	XXXXX XXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXXXXXX	XXXX
X	XXXXX XXXX XXXXXXXXXXXXX XXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXX	XXXX
X	XXXXX XXXXXXX XXXXXXXXXXX XXXX XXXX	XXXXXXX	XXXX
X	XXXXXXXX XXXXXXXX XXXXXXXXXXXXXXX XXXX XXXX	XXXXXXX	XXXX
X	XXXXXXXX XXXXXXX XXXXXXX XXXXXXXX XXXX XXXX	XXXXXXX	XXXX
X	XXXXXXXX XXXXXXXXXXXXXXXX XXXXX XXXXXXXX XXXX XXXX	XXXXXXX	XXXXX

X	XXXXXXXXXXXXXXXXXXXX X XXXXXXXXXXXX XXXX XXXX		XXXXXXXX	XXXX
XX	XXXXXXXXXXXXXXXXXXXX XXXX XXXX		XXXXXXXX	XXXX
XX	XXXXXXXXXXXXXXXXXXXX XXXX XXXX		XXXXXXXX	XXXX
XX	XXXXXXXXXXXXXXXXXXXX XXXX XXXX		XXXXXXXX	XXXX
XX	XXXXXXXXXXXXXXXXXXXX XXXX XXXX		XXXXXXXX	XXXX
XX	XXXXXXXXXXXXXXXXXXXX XXXX XXXXXXXXXXXXXXXXXXXX XXXX XXXX		XXXXXXXX	XXXX
XX	XXXX XXXXXXXXXXXXXXXXXXXX XXXX XXXX		XXXXXXXX	XXXX
	XXXXX		XXXXXXXXXX	X
	XXXXX		XXXXXXXXXX	X

Source:Tranalysis

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3.1 Glyphosate

Since Jan. XXXX, the ex-works price of glyphosate technical has been climbing due to the rising prices of its crucial raw materials of paraformaldehyde and glycine as a result of crude oil price hike. Moving into XXXX, the ex-works price of glyphosate technical began to dwindle from USDXX,XXX/t in Dec. XXXX, a record high in the recent three years, as most of buyers postponed purchasing plans. The price is unlikely to mark up significantly in the coming few months.

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According to the import and export data from Tranalysis, China's glyphosate were exported to over XX destinations around the world. In XXXX, a total of XXX,XXX.XXX tonnes (XXX% AI volume) of glyphosate products were exported from China—XX,XXX.XXX tonnes (XXX% AI volume, =X.XX% of the total) to Russia and X,XXX.XXX tonnes (XXX% AI volume, =X.XX% of the total) to Ukraine.

- Major products to Russia: XX% glyphosate TC and XX% glyphosate IPA in XXXX
- Major products to Ukraine: XX% glyphosate IPA and XX% glyphosate TC in XXXX
- Major exporters: In May XXXX–Jan. XXXX, the top X glyphosate TC exporters were Fuhua Tongda Agro-Chemical Technology Co., Ltd., Shandong Weifang Rainbow Chemical Co., Ltd. and Youth

Chemical Co., Ltd, accounting for totally XXX,XXX.XXX tonnes (XXX% AI volume) in this period which altogether equated to XX.XX% of total glyphosate exports from the top XX Chinese exporters.

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3.2 Carbendazim

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According to the import and export data from Tranalysis, XX countries had trades with Chinese carbendazim manufactures in the previous one and a half years. In XXXX alone, XX,XXX.XXX tonnes (XXX% AI volume) of carbendazim products were exported from China.

- Major product to Russia: XX% carbendazim TC, totalling XXX.XXX tonnes (XXX% AI volume) and accounting for XX% of Russia's total carbendazim exports from China in XXXX
- Products to Ukraine: XXXg/L carbendazim SC and XX% of carbendazim TC, totalling X,XXX.XXX tonnes (XXX% AI volume) in XXXX
- Major exporters: In May XXXX–Jan. XXXX, Anhui Guangxin Agrochemical Co., Ltd. accounted for XX.XX% of China's Top XX azoxystrobin exports, ranking the first and followed by Sinoway International (Jiangsu) Co., Ltd. and Ningxia Wynca Technology Co., Ltd., with XX.XX% and XX.XX% of top XX total, respectively.

Table 3.2-1 China's carbendazim exported to Russia and Ukraine in 2021, tonne

Destinati on	250g/ L SC	50% SC	50% WDG	50% WP	500g/L SC	80% WDG	80% WP	95% Tech.	97% Tech.	98% Tech.	XXXXX volume (converted to 100% technical)
XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXXX	XXXXXXX
XXXXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXXXXXX XX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXXX	XXXXXXXXXX X
XXXXXX	XXXXX	XXXXXX X	XXXXXX X	XXXXXX X	XXXXXXXXXX XX	XXXXX X	XXXXXX X	XXXXXX	XXXXXX X	XXXXXXXXXX XX	XXXXXXXXXX XX
XXXXX	XXXX X	XXXXXX XX	XXXXXX XX	XXXXXX XX	XXXXXX XXX	XXXX XX	XXXX XX	XXXX X	XXXX XX	XXXXXXX XXX	XXXXXXX XXX

Source: Tranalysis

Table 3.2-2 Top 10 Chinese exporters of carbendazim in May 2020–Jan. 2022

No.	Exporter	Volume, tonne
X	XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXX
X	XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXX
X	XXXXXXXX XXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXXXXXX
X	XXXXXXXXXX XXXXX XXXXXXXX XXX XXXXXXX XXXX XXXX	XXXXXXXXXX
X	XXXXXXXXXX XXXXXXX XXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXX
X	XXXXXXXXXX XXXXXXX XXXXXXXXXXXXXXX XXXX XXXX	XXXXXXXXXX
X	XXXXXXXXXX XXXXXXXXXXX XXXX XXXX	XXXXXXX
X	XXXXX XXXXXXX XXXXXXX XXXXXXX XXXX XXXX	XXXXXXX
X	XXXXXXXXXX XXXXXXX XXXXXXX X XXXXXXX XXXX XXXX	XXXXXXX
XX	XXXXXXXXXX XXXX XXXXXXXXXXXXXXX XXXXXXX XXXX XXXX	XXXXXXX
XXX XX XXXXX		XXXXXXXXXX

Note: The volume in this table is converted into 100% AI.

Source: Tranalysis

3.3 Azoxystrobin

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According to the import and export data from Tranalysis, since May XXXX, China exported azoxystrobin products to XX destinations, including Ukraine and Russia—Russia ranked the Xth and Ukraine were the XXth amongst the top ten destinations by export volume in May XXXX-Feb. XXXX.

- Major products to Russia: XX% azoxystrobin TC and XX% azoxystrobin TC, accounting for XX.XX% of azoxystrobin exports (XXX% AI volume) from China in XXXX
- Major product to Ukraine: XX% azoxystrobin SC, accounting for XX.XX% (XX.XXX tonnes) of azoxystrobin exports (XXX% AI volume) from China in XXXX
- Major exporter: CAC Nantong Chemical Co., Ltd. was the largest Chinese exporter of azoxystrobin, with the exported volume of XX,XXX.XXX tonnes, accounting for XX.XX% of China's total exports from May XXXX to Feb. XXXX.

Table 3.3-1 China's azoxystrobin exported to Russia and Ukraine in 2021, tonne

Destination	18.7% SC	25% SC	25% WDG	32% SC	40% WP	50% WDG	60% WDG	80% WDG	95% Tech.	96% Tech.	97% Tech.	98% Tech.	XXXXX volume (converted to 100% technical)
XXXXXXXX	XXXXXX X	XXXXXX X	XXXXX X	XXXXXX	XXXXX X	XXXXXX	XXXXX X	XXXXXX	XXXXXX	XXXXX X	XXXXXX X	XXXXXXXXXX	XXXXXXXXXX
XXXXXX X	XXXXXX	XXXXXX XX	XXXXX X	XXXXXX	XXXXX X	XXXXXX	XXXXX X	XXXXXX	XXXXXX	XXXXX X	XXXXXX	XXXXXX	XXXXXX
XXXXXXXX	XXXXXX X	XXXXXX XX	XXXXX X	XXXXXX X	XXXXX X	XXXXXX X	XXXXX X	XXXXXX X	XXXXXX X	XXXXX X	XXXXXX XX	XXXXXXXXXX XX	XXXXXXXXXX XX
XXXXXX	XXXX XX	XXXX XXX	XXX XX	XXXX XX	XXX XX	XXXX XX	XXX XX	XXXX XX	XXXX XX	XXX XX	XXXX XXX	XXXXXX XXX	XXXXXX XXX

Source: Tranalysis

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3.4 Tebuconazole

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

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