

Production projects of China's pesticide industry in 2022

The First Edition

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1. Introduction

The overriding food security across the globe has brought great opportunities to Chinese pesticide producers—as the global agricultural prices rise spurring interest and motivation among agricultural farmers, prices of fertilisers, pesticides and other agricultural materials have been rising in H1 2022. But challenges are standing in front of Chinese producers. The most prominent cases are the Russia-Ukraine conflict that has caused surges in worldwide chemical raw materials and energy prices, the upgraded lockdown and control measures against the Covid-19 across China that have raised material costs and disrupted energy supply and logistics, etc. Chinese pesticide companies, especially those of small and medium sizes, are facing higher levels of international and domestic pressures.

As the global production capacity of pesticide technical is gradually transferred to China, India and other developing countries, the problem of overcapacity has occurred due to low level of redundant capacity construction, and vicious undercutting has followed. Since 2018 when China adopted action to achieve zero growth in chemical fertiliser and pesticide use, the country has recorded improved efficacy of pesticides and declined domestic use. China has been the world's largest pesticide producer and Chinese companies engaging in pesticide technical manufacturing and export are increasing their investment in overseas marketing in recent years.

The leading agrochemical companies in China boasted high production and sales of pesticide products thanks to their advanced production technologies and abundant resources regarding to raw materials, energy and others. For example, Shandong Luba Chemical Co., Ltd. marked growing sales of glufosinate-ammonium, CAC Nantong Chemical Co., Ltd. with rising demand for chlorothalonil and 2,4-D, and Sichuan Hebang Biotechnology Co., Ltd. having more orders for glyphosate, etc. According to the financial reports, most of the listed companies gained rises in both sales prices and volumes of their herbicide products for H1 2022.

CCM research shows that there are 77 new pesticide capacity investment projects that are in the planning, EIA and construction stage in China's pesticide industry as of Oct. 2022; apart from the majority of upgrading and capacity expansion projects for technicals, there also include intermediates and raw materials projects. A great many of the concerning projects are (to be/being) established in East, Northwest and central China.

In this report, CCM will do overview of pesticide industry in China Q1-Q3 2022 from the following aspects:

- √ Overview of China's pesticide industry in Q1-Q3 2022
- √ Project dynamics of top 20 Chinese pesticide enterprises
- √ Project status of top 100 pesticide enterprises
- √ Pesticide technical projects of non-top 100 enterprises

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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

As of Oct. XXXX, China's first three quarters noted some regions across China, showed weak performance in pesticide production. In QX–QX XXXX, the import and export volume of pesticides with a year-on-year growth of X.XX%, though imports decreased by near XX%.

On X July XXXX, CCPIA launched the List of XXXX China Top XXX Pesticide Enterprises ranking by the XXXX sales results. According to CCM research, in QX-QX, totally XX production projects pertaining to pesticide technical, formulation and the intermediates for capacity expansion; XX projects for pesticide technical and/or intermediates and formulations were revealed in the Chinese pesticide enterprises of different sizes that are outside the Top XXX list.

In terms of project capacity and regional distribution, most scale pesticide capacity investment projects are located in Sichuan Province, Hubei Province and Inner Mongolia Autonomous Region. In the XX projects that are in the planning, EIA and construction stage, XX.X% are related to production of intermediates only, XX.X% are of pesticide technical only, and X.X% are for formulation only.

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 Regional output of pesticide technical in China, Jan.–Sept.

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Table 1.1-1 China's pesticide technical output by province/region, Jan.–Sept., 2022 vs 2021, tonne

No.	XXXXXX	Sept. 2022	MoM	Jan.–Sept. 2021	Jan.–Sept. 2022	YoY change
X	XXXXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
X	XXXXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
X	XXXXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
X	XXXXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
X	XXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
X	XXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
X	XXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
X	XXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
XX	XXXXXX XXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX
XX	XXXXXX XXXXXXXX XXXXXXXXXX	XXXXXX	XXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX

	XXXXXX					
XX	XXXXXXXX XXXXXXXX	XXXXX	XXXXX	XXXXXX	XXXXXX	XXXXXX
XX	XXXXXXXXXX XXXXXXXXXX	XXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX
XX	XXXXX XXXXXXXXXX	XXX	XXXXXXXX	XXXXXX	XXXXXX	XXXXX
XXXXXX		XXXXXX	XXXXXXXX	XXXXXX	XXXXXX	XXXXXX
XXXXX		XXXXXXX	XXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXX

Note: The output here is converted into 100% AI volume.

Source: National Bureau of Statistics (NBS) and CCM

1.2 Imports and exports of pesticide in China, Jan.–Sept.

In Jan.–Sept. XXXX, the import and export volume of China's pesticides, such as herbicides, insecticides and fungicides, grew X.XX% year on year, which are XXX,XXX.XXX tonnes on aggregate, breaking down to XX,XXX.XXX tonnes (X%) of imports and XXX,XXX.XXX tonnes (XX%) of exports.

The import volume of pesticide during the period registered a near XX% decrease compared with the same period last year. Even though in QX, the August import volume of pesticide witnessed a YoY growth, large decreases came in July and Sept. The exports showed the opposite trajectory with a YoY drop in August volume, but double-digit increases in July and Sept. which were XX.XX% and XX.XX% YoY, separately.

Table 1.2-1 Import volume of pesticides in China, Jan.–Sept. 2022, tonne

Date	Herbicide	Insecticide	Fungicide	Monthly volume	Prev Yr Monthly volume	YoY change
XXXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXX
XXXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXX
XXXXXX XXXX	XXXXXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXX
XXXXXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXX
XXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXX
XXXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXX
XXXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXX
XXXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXX
XXXXXX XXXX	XXXXXXX	XXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXX
XXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXXXXXX	XXXXXX

Note:1. The calculated volume is based on actual quantity of goods imported.

2. These data are collected under 8 digit HS code provided by China Customs. Thereinto, herbicides are subject to HS code 38089319, insecticides to 38089190 and fungicides to 38089290.

Source:China Customs and CCM

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2 Dynamics of pesticide projects in China's pesticide industry in 2022

On X July, China Crop Protection Industry Association (CCPIA) launched the List of XXXX China Top XXX Pesticide Enterprises ranking by the XXXX sales results. According to CCM research, there are totally XX production projects pertaining to pesticide technical, formulation and the intermediates in the planning, EIA and construction stage and planned by enterprises among the top XXX, including X companies that carry forward more than one project, such as Shandong Luba Chemical Co., Ltd. (X), Hailir Pesticides and Chemicals Group Co., Ltd. (X) and Shandong Sino-Agri United Biotechnology Co., Ltd. (X), Nanjing Red Sun Co., Ltd. (X).

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2.2 Projects of top 100 pesticide enterprises

XX enterprises listed the XXst–XXXth in the XXXX China Top XXX Pesticide Enterprises are planning/EI assessing/constructing XX production projects as of Oct. XXXX. These XX projects are in relation to construction of XXX,XXX t/a capacities of pesticide technical & formulations and their intermediates.

For instance, Shandong Luba Chemical Co., Ltd., ranked the XXth among the Top XXX, has X projects representing XXX,XXX t/a capacity of pesticide technical and intermediates in aggregate that are operated by its X subsidiaries located in Shandong Province——Weifang Xinlu Chemical Co., Ltd., Shandong Hengdong Biotechnology Co., Ltd. and Dezhou Luba Fine Chemical Co., Ltd. Pingyuan Subsidiary.

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Table 2.2-1 Pesticide projects in the 21st–100th enterprises of the top 100 pesticide enterprises, as of Oct.

2022

No.	Company name	XXXXXXX XXX for operation	Type	Capacity, XXX	Name XX XXXXXXXX X concerning product	Status	Ranking
X	XXXXXXX X XXXX XXXXXXX X XXXX XXXX	XXXXXXX XXXXXX XXXXXXX X XXXX XXXX	XXXXXXX XX XXXXXXX XXXXXX	XXXXXX	XXXXXX XXX XXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXX XXXXXXX XXX XXXXXXXXXXX XXXX XXX XXXXXXXXXX	XX XXX XXXXXXX	XX
X			XXXXXXX XX XXXXXXX XX	XXXXXX	XXXXXXXXXXXXXXXXXXXXXXXXX XX XXX XXXXXXXXXXX XXX	XX XXX XXXXXXX	
X			XXXXXXX XX XXXXXXX XX	XXXXXX	XXXXXX XXXXXXXXXXX XXX	XX XXX XXXXXXX	
X			XXXXXXX XX XXXXXXX XX	XXXXXX	XXXXXXXXXXXX XX XXX XXXXXXXXXXXXXXXXXXXX XXX	XX XXX XXXXXXX	
X			XXXXXXX XX XXXXXXX XX	XXXXXX	XXXXXX XX	XXXXX XXXXXXX XXXXX	
X			XXXXXXX XX XXXXXXX XX X XXX XXXXXXX	XXXXXX	XXXXXXXXXXXXXXXXX	XXXXX XXXXXXX XXXXX	



			XXXXXX				
X		XXXXXXXX X XXXXXXXX X XXXXXXXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XX X XX XXXXXXXX XXXX	XXXXXX	XXXXXXXXXX XXX XXXXXXXXXXXX XX XX XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX	XX XXX XXXXXXXX	
X		XXXXXXXX XXXX XXXX XXXXXXXX X XXXX XXXX XXXXXXXX X XXXXXXXX XXX	XXXXXXXX XX XXXXXXXX XX	XXXXXX	XXXXXX XX	XX XXX XXXXXXXX	
X	XXXXX XXXXXXXX XXXXXX XXXX XXXX	XXXXXXXX XXXX XXXXXXXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XX	XXXXXX	XXXXXXXXXX XX	XX XXXXXX XXXXXXXX X	XX
XX	XXXXXXXX X XXXXX XXXXXXXX X XXXX XXXX	XXXXXXXX X XXXXX XXXXXXXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XX X XXX XXXXXXXX XXXX	XXXXXX	XXXXXXXXXX XXX XXXXXXXXXXXX XXX XXXXXXXXXXXX XX XXX XXXX XXXXXXXXXXXXXXXX	XX XXXXXX XXXXXXXX X	XX
XX			XXXXXXXX XX XXXXXXXX XX	XXXXXX	XXXXXXXXXXXX	XXXXX XXXXXXXX XXXXX	
XX	XXXXX XXXXXXXX XXXXXXXX XXXXX XXXXXXXX XXX XXXX XXXX	XXXXX XXXXXXXX XXXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXXXXXXXXXXXX XXX XXXXXXXXXXXXXXXXXX XXXXXXXXXXX XX XXX XXXXXXXXXXXXXXX XXXXXXXX XXXXXXXX XXXXXX X XXX XXX	XX XXXXXX XXXXXXXX X	XX
XX	XXXXX XXXXX XXXXXXXX X XXXXXXXX X XXXX XXXX	XXXXX XXXXX XXXX XXXXXXXX XXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XX X XXX XXXXXXXX XXXX	XXXXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX XXX XXXXXXXXXXXX XXXXXXXX	XXXXX XXXXXXXX XXXXX	XX
XX	XXXXXXXX X XXXXXXXX XX XXXXXX XXXXXXXX XXXX XXXX	XXXXX XXXXXXXX XXXXXXXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XXXX	XXXXXX	XXXXXXXXXXXXXXXXXXXX	XXXXX XXXXXXXX XXXXX	XX



XX	XXXXXXXX X XXXXX XXXXXXXX XX X XXXXXXXXX XX XXXX XXXX	XXXXXXXX XXXXX XXXXX XXXXXXXX XXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XX	XXXXX	XXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXX XXXXXXXXXXXXXXXX	XX XXX XXXXXXX	XX
XX	XXXXXXXX X XXXXXXXX XX XXXXXX XXXXXX XXXXXX XXXX XXXX	XXXXXXXX XXXXXX XX XXXXX XXXXXXXX X XXXX XXXX	XXXXXXXX XX XXXXXXXX XX	XXX	XXXXXXXXXXXXXXXXXXXXXXXXX XX XXX XXXXXXXXXXXXXXXXXXXX XX	XX XXX XXXXXXX	XX
XX			XXXXXXXX XX XXXXXXXX XX	XXXXX	XXXXXXXXXXXXX XX	XX XXXXXX XXXXXXX X	
XX			XXXXXXXX XX XXXXXXXX XXXXXX	XXXXX	XXXXXXXXXXXXX	XX XXX XXXXXXX	
XX			XXXXXXXX X XXXXX XXXXXXXX XX XXXXXXXX X XXXX XXXX	XXXXX	XXXXX XXX XXXXXXXXXXXXXXXX XX XXXXXXXXXXXXX XXXXXXXX	XXXXXX XXXXXXX XXX	
XX	XXXXXXXX XXXXXX X XXXXX XXXX XXXX	XXXXXXXX X XXXXXX XXXXXX XXXX XXXXXX XXXXXX XXXX	XXXXXXXX XX XXXXXXXX XXXXXX	XXXXXXX	XXXXXXXXXXXXXXXXXXXXX	XXXXXXX X	XX
XX	XXXXXX XXXXXX X XXXXX XXXX XXXX	XXXXXX XXXXXX X XXXXX XXXX XXXX	XXXXXXXX XX XXXXXXXX XX	XXXXX	XXXXXXXXXXXXX XXX XXXXXXXXXXXXXXXXXXXXXXXX XXX XXXXXXXXXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXX	XX XXX XXXXXXX	XX
XX	XXXX XXXX XXXXXXXX XXX XXXXXX XX XXXX XXXX	XXXX XXXX XXXXXXXX XXX XXXXXX XX XXXX XXXX	XXXXXXXX XX XXXXXXXX XXXXX	XXXXXX	XXXXXXXXXXXXX XXX XXXXXXXXXXXX XXXXXX XXXXXXX XX XXXXXX XXX XXXXX XXXXXXXXXXXX XXXXXXXXXXXXXXX	XX XXX XXXXXXX	XX
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XX	XXXXXXXX XXX XXXX	XXXXX XXXXXX	XXXXXXXX XX	XXXXXX	XXXXXXXXXXXX XXXXXX XXXXXXX XX XXXXX XXX XXXXXXX XXXX	XX XXXXXX	XX

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XXXXXX				XXXXXXXX	X		

Note: EIA refers to environmental impact assessment;

EI report refers to environmental impact report;

Ranking refers to the position of a company listed in the 2022 China Top 100 Pesticide Enterprises.

Source: CCM

2.3 Pesticide technical projects of non-top 100 enterprises

In addition to the XX projects proposed by the Top XXX pesticide enterprises, there are XX new projects for pesticide technical and/or intermediates and formulations in XX Chinese pesticide enterprises of different sizes that are outside the Top XXX list, which are in the planning, EIA and construction stage. Among the XX projects, XX ones involve (but not limited to) production of pesticide technicals, representing TC capacity total of XXX,XXX t/a.

Regional distribution of the XX ones:

- X in East China region;
- X in the Northwestern China;
- X in Central China;
- X in North China, with construction scale larger than the technical projects in other regions

Table 2.3-1 Technical projects in non-top 100 enterprises, as of Oct. 2022

No.	Name XX XXXXXXXXXX company	XX capacity, XXX	Detail	Status	XXXXXXXX /Region
X	XXXXXXXX XXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXX XXXXXXXXXX XXXXXXXXXX XXXXXXXX	XX XXX XXXXXXXX	XXXXXXXX XXXXXXXX
X	XXXXXXXX	XXXXXX	XXXXXXXXXX	XXXXXX	XXXXXXXX



	XXXXXXXX XXXXXXXXXX XXXX XXXX		XXXXXXXXXX XXXXXXXXXX XXXXX XXX XXXXXXXXXXXXXX XXXXXXX XXX XXXXXXXXXXXXXX XXXXXXXX XXXXXX XX	XXXXXXXXXXXXXX	XXXXXXXX
X	XXXXXXXX XXXXXXXX XXXXXXXXXX XXXX XXXX	XXXXXX	XXXXX XXX XXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXX XXXXXXX	XX XXX XXXXXXXX	XXXXXXXX XXXXXXXX
X	XXXXXXXX XXXXXX XXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXXXXXX XXXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXX XXXXXX XX XXX XXX XXX XXXXXXXXXXXXXX XXX XXX XXX XXXXXX XXXXXXXXXXXXXX XXXXXXXXXX	XXXXXXXXXXXXXX XXXXXXXXXX	XXXXXXXX XXXXXXXX
X	XXXXXXXX XXX XXXXX XXXXXXX XXXXXXXXX X XXXXXXXXXXXX XXXX XXXX (subsidiary XX XXXXXX XXX XXXXX XXXX XXXXXXXX XXXX XXXXX)	XXXX	XXX XXX XXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXXXX XXX XXXXXXX	XX XXX XXXXXXXX	XXXXXXXX XXXXXXXX
X	XXXXX XXXXXXX XXX XXXXXXXXXXXXXX X XXXX XXXX	XXXXXX	XXXXXXXXXX XXXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXX XXXXXX XXX XXX XXXXXXXXXXXXXX XXXXXXX	XX XXX XXXXXXXX	XXXXX XXXXXXXX
X	XXXXXXXX XXXXXXXX XXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXXXXXX XXXXXXXXXX XXXX XXX XXXXXXXXXXXXXX X XXX XXX XXXXXXXXXXXXXX XXX XXX XXX XXXXXXXXXXXX XXXXXXXXXXXXXX XXXXXX XXXXXXX	XXXXXXXXXX	XXXXXXXX XXXXXXXX
X	XXXXX XXXXXXX XXXXXXXXXX XXXX XXXX (subsidiary XX XXXXX XXXXXXXXXX XXXXXXXXXX XXXX XXXXX)	XXXXXX	XXXXXX XXX XXXXXXXXXXXXXX XXXXXXXXXXXXXX XXX XXXXXXXXX XXXXXXX XXXXXXXX XXXXXX XXX XXXXXXXXXXXXXX X XXX XXXXX XXX XXXXXXXXXXXX XXX	XX XXX XXXXXXXX	XXXXX XXXXXXXX

X	XXXXX XXXXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXX XXXXXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXXXX XXX XXXXXXX XXX XXXXXXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXX XX	XX XXX XXXXXXXX	XXXXXX XXXXXXXX
XX	XXXXXX XXXXXXXX XXXXXXX XXXXXXXX XXXX XXXX	XXXXXX	XXXXXXXXXX XXXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXXXX XXX XXXXX XXX XXXXXXXXXXXXXXXX XXX XXX XXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXX XXXXXXXX	XXXXXX XXXXXXXXXXXXXXXX	XXXXXX XXXXXXXX XXXXXXXXXXXX XXXXXX
XX	XXXXXX XXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXX XXXXXXXXXXXX XXX XXXXXXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXX X XXXXX XXXXX XXX XXXXXXXXXXXXXXXX XX XXXXXXXXXXXX XXXXXX	XX XXX XXXXXXXX	XXXXXX XXXXXXXX
XX	XXXXXX XXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXX XXXXXXXXXXX XXX XXXXXXXXXXX XXXXXXXXXXXX XXXXXXXX XXXXXXX X X XXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXX XX XXXXX XX XXXX XXXXX XXX XXXXXXXXXXXXXXXX X XXXXX XXX XXXXXXXXXXXXXXXX XXXXXXXX XXX XXXXXX XXX XXXXXXXXXXXX XXX	XX XXX XXXXXXXX	XXXXXX XXXXXXXX
XX	XXXXXX XXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXX XXXXXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXXXX XXXXXX XXX XXXXXXXXXXXX XXXXXX XXX XXXXXXXXXXXX XXXXXX	XX XXX XXXXXXXX	XXXXXX XXXXXXXX
XX	XXXXXXXX XXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXX XXXXXXXXXXXX XXXXXX XXX XXXXXXXXXXXXXXXX XXXXXXXXXXXX XXXXXX XXXXXXXXXXXX XXXXXX	XXXXXXXXXX	XXXXXX XXXXXXXX

			XXXXXXXXXXXX XXXXXX		
XX	XXXXXXXXXX XXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXX X XXXX XXXX	XXXXXX	XXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXXXXXXXXXX XXXXXX	XX XXXXXXX XXXXXXXXXX	XXXXXX XXXXXXXX
XX	XXXXXXXX XXXXXXX XXXXXXXX XXXX XXXX	XXXXXX	XXXXXXXXXX XXXXXXXXXXXX XXXXXX XXX XXXXXXXX XXX XXXXXX XXX XXXX XXX XXXXXXX XXX XXXXXXX	XX XXX XXXXXXX	XXXXXXXX XXXXXXXXXXXX XXXXXX
XX	XXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXXXX XXX XXXXXXXXXXXX XXXXXX XXXXXXXXXXXX XXXXXX XXX XXXXXX XXX XXXX XXX XXX XXXXXX XXX	XXXXXXXXXXXX XXXXXXXXXX	XXXXXXXX XXXXXXXXXXXX XXXXXX
XX	XXXXXX XXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXXXX XXXX XXX XXXXXXXXXXXX XXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXX XXXXXXXX XXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXX	XXXXXX XXXXXXXXXXXX	XXXXXX XXXXXXX
XX	XXXXXX XXXX XXXXXX XXXXXXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXXXX XXXXXXXXXXXX XXX XXXXXXXXXXXX XXXXXX XXXXXXXXXXXX XXX XXXXXXXXXXXX XXXXXX	XX XXXXXXX XXXXXXXXXX	XXXXXX XXXXXXX
XX	XXXXXXXX XXXXXXXXXXXX XXXX XXXX (subsidiary XX XXXXXXXX XXXXXXXX XXXXXXXX XXXX XXXX)	XXXXXX	XXXXXX XXX XXXXXXXXXXXX XXXXXXXXXXXX XXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXXXXXXXX XXXXXX	XX XXX XXXXXXX	XXXXXX XXXXXXX
XX	XXXXXXXX	XXXXXX	XXXXXX XXX	XX XXX XXXXXXX	XXXXXX XXXXXXX

	XXXXXXXXXX XXXXXXXXXXXXXXXXXX XXXX XXXX		XXXXXXXXXX XXXXXXXXXX XXXXXXXXXXXXX XXXXXXX		
XX	XXXXXX XXXXX XXXXXXXXXXXXXXXXXX XXXX XXXX	XXXXXX	XXXXXX XXX XXXXXXXXXXXXX XXXXXXXXXXXXX XXXXXXXXXXXXX XXXX XXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXX XXXXXX XXXXXXXX XXXXXX XXXXX XXXXXX XXXXXXXXXXXXX XXXXXX XXX XXXXXX XXX XXXXXXXXXXXXX XXXXXXXXXXXXX	XX XXX XXXXXXXX	XXXXXX XXXXXXXXXX

Note:EIA refers to environmental impact assessment;
 EI report refers to environmental impact report.
 Source:CCM

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3.1 Project capacity and regional distribution

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Table 3.1-1 Number and capacity of projects by region, as of Oct. 2022

Location	XXXXXXXX / autonomous region / municipality	Number of project	XXXXX capacity, t/a
XXXX XXXXX	XXXXX XXXXXXXXXX XXXXXXXX XXXXXXXXXX XXXXXXXX XXXXXXXXXX XXXXXXXX XXXXXXXXXX XXXXXXXX XXXXXXXXXX	XX	XXXXXXXXXXXX
XXXXXXXXXX	XXXXX XXXXXXXXXX XXXXXXXX XXXXXXXXXX XXXXXX	XX	XXXXXXXXXXXX
XXXXX XXXXX	XXXXX XXXXXXXXXX XXXXX XXXXXXXX XXXXXXXXXX XXXXXX	XX	XXXXXXXXXXXX
XXXXXXXX XXXXX	XXXXX XXXXXXXXXX XXXXX XXXXXXXX	XX	XXXXXXXXXXXX
XXXXXXXXXX	XXXXXXXX XXXXXXXXXX XXXXXXXX XXXXXXXXXXXXXXXX XXXXX XXXXXXXX	X	XXXXXXXXXXXX
XXXXXXXXXX	XXXXXXXX XXXXXXXXXX	X	XXXXXXXXXX
XXXXX		XX	XXXXXXXXXXXX

Source:CCM

As of Qct, in Shandong Province, there are XX projects in the planning, EIA and construction stage, with the combined designed capacity of XXX,XXX t/a (=XX.X% of the national total capacities of the XX concerning projects), XXX,XXX t/a of which contains pesticide technical. Inner Mongolia Autonomous Region has X projects with designed production capacities of XXX,XXX t/a (=XX.X% of the national total capacities of the XX concerning projects), XXX,XXX t/a of which contains pesticide intermediates.

Table 3.1-2 Capacity of 77 projects in province / autonomous region / municipality, t/a

No.	XXXXXXXX X X autonomous region X municipality	Pesticide intermediates	Pesticide technical & its intermediates	Pesticide technical	Pesticide formulations	Pesticide technical and formulations	Pesticide technical & formulations and their intermediates	Pharmaceutical and pesticide intermediate	XXXXX
X	XXXXXXXX XXXXXXXX X	XXXXXXXX	X	XXXXX	X	X	X	X	XXXXXXXX
X	XXXXXXXX X	XXXXXX	XXXXXXXX	XXXXXX	XXXXXX	X	X	X	XXXXXXXX

	XXXXXXX X								
X	XXXXX XXXXXXXX X XXXXXXXX XXX XXXXXX	XXXXXXX	XXXXXX	X	X	X	XXXXXX	XXXXX	XXXXXXX
X	XXXXX XXXXXXXX X	XXXXXXX	XXXXXX	XXXXX	X	XXXXXX	X	X	XXXXXXX
X	XXXXX XXXXXXXX X	XXXXX	X	XXXXXX	XXXXXX	X	XXXXXX	X	XXXXXXX
X	XXXXX XXXXXXXX X	XXXXXX	XXXXXX	XXXXX	X	XXXXX	XXXXX	XXXXXX	XXXXXX
X	XXXXXXXX XXXXXXXX XXX XXXXXX	X	XXXXXX	XXXXXX	X	XXXXXX	X	X	XXXXXX
X	XXXXXXXX XXXXXXXX X	XXXXXX	X	X	X	X	X	X	XXXXXX
X	XXXXXXXX XXXXXXXX X	X	X	XXXXXX	XXXXXX	X	X	X	XXXXXX
XX	XXXXX XXXXXXXX X	X	XXXXX	XXXXXX	XXXXXX	X	X	X	XXXXXX
XX	XXXXXX XXXXXXXX X	X	X	X	X	X	XXXXXX	X	XXXXXX
XX	XXXXXXXX X XXXXXXXX X	X	X	XXXXX	X	XXXXX	X	X	XXXXXX
XX	XXXXXXXX X XXXXXXXX X	X	X	XXXXX	X	X	X	XXXXX	XXXXX
XX	XXXXXXXX XX XXXXXXXX XXXXX	X	X	XXXXX	X	X	X	X	XXXXX
XX	XXXXX XXXXXXXX	X	X	XXXXX	X	X	X	X	XXXXX

	X								
XXXXX		XXXXXXXX XX	XXXXXXXX	XXXXXXXX	XXXXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXXXX XX

Source:CCM

3.2 Construction progress

As of Oct. XXXX, there are XX ongoing pesticide projects in China's pesticide industry which can be broken down by progress:

- X% in planning;
- XX% in EIA process and with EI report approved;
- XX% under construction and X% in trial production;
- and X % with construction completed (but yet put into operation).

Table 3.2-1 Project progress of 77 pesticide projects in China, as of Oct. 2022

No.	Status		Pesticide technical	Pesticide intermediates	Pesticide technical & its intermediates	Pesticide formulations	Pesticide technical and formulations	Pesticide technical & formulations and their intermediates	Pharmaceutical and pesticide intermediate	XXXXX
X	XXXXXXXXX	XXXXXXXXX X	X	X	X	X	X	X	X	X
		XXX XXXXXXXXX	X	X	X	X	X	X	X	X
X	XXX	XX XXX XXXXXXXXX	XX	X	X	X	X	X	X	XX
		XX XXXXXXX XXXXXXXXX X	X	X	X	X	X	X	X	XX
X	XXXXXXXXX XXXX	XXXXXX XXXXXXXXX XXXXXX	X	X	X	X	X	X	X	XX
		XXXXXX XXXXXXXXX XXXX	X	X	X	X	X	X	X	X
		XXXXXXXXX XXXXXX XXXXXXXXX XX	X	X	X	X	X	X	X	X
XXXXXX			XX	XX	XX	X	X	X	X	XX

Note: IPO refers to initial public offering;

EIA refers to environmental impact assessment;

EI report refers to environmental impact report.

Source: CCM

3.3 Product type

The XX pesticide projects in the planning, EIA and construction stage as of Oct. XXXX are designed to produce a single product type or product combination of pesticide technical, formulation and intermediates; XX.X% are related to production of intermediates only, XX.X% are of pesticide technical only, and X.X% are for formulation only.

XX of the XX projects are expansion projects based on the established production scale of pesticide enterprises. For instance, Hebei Lingang Chemical Co., Ltd. (Hebei Lingang), a subsidiary of Hebei

Chengxin Co., Ltd. with EI report for a XX,XXX t/a agrochemicals project published on X Oct. XXXX, plans to upgrade the production equipment in the existing two atrazine workshops and build additional XX,XXX t/a terbuthylazine TC and X,XXX t/a terbutryn TC. Currently, the company has production capacities of XX,XXX t/a atrazine TC, X,XXX t/a ametryn TC and X,XXX t/a simazine TC.

Table 3.3-1 Capacity of 77 projects by product scheme as of Oct. 2022

No.	Product scheme	XXXXXXXX / autonomous region / municipality	Capacity, t/a
X	XXXXXXXXXXXXXXXXXXXX	XXXXXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX XXXXXXXXXXXX XXXXXXX	XXXXXXXXXXXX
		XXXXXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXXXXXXXXX	XXXXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXX XXXXXXXXXXXXXXX	XXXXXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX XXXXXXXXXXXX XXXXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXXXXX XXXXXXXX XXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXXXXXXXXX	XXXXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXX	XXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXXXXX XXXXXXXX	XXXXXXXXXXXX
		XXXXXXXX XXXXXXXX	XXXXXXXXXXXX

		XXXXXXXXXXXXXXXXXXXX XXXXXX	XXXXXXXXXX
		XXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXXXX XXXXXXXXXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXXXX	XXXXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXXXXXXXXXX	XXXXXXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXXXX	XXXXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXXX XXX XXXXXXXXXXXXXXX	XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXXXX XXXXXXXXX XXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXXXX	XXXXXXXXXXXX
X	XXXXXXXXXXXX XXXXXXXXX X XXXXXXXXXXXXXXXX XXX XXXXXX XXXXXXXXXXXXXXX	XXXXXX XXXXXXXXX XXXXXXXXXXXX XXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX	XXXXXXXXXX

		XXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXX	XXXXXXXXXX
X	XXXXXXXXXXXXXXXXXXX XXX XXXXXXXXXX XXXXXXXXXXXXXXXXXX	XXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXX XXXXXXXXX XXXXXXXXXXXX XXXXXXX	XXXXXXXXXX
		XXXXXXXXXX XXXXXXXXX	XXXXXXXXXX
		XXXXXXXXXXXX	XXXXXXXXXX
XXXXX			XXXXXXXXXXXXXXXX

Source:CCM

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