CCM Data & Business Intelligence

Survey of Metolachlor in China

The Third Edition

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Contents

Executive summary……1
Methodology and source……2
1 Overview of China's pesticide industry and metolachlor's position in herbicide industry ……...4
1.1 Brief introduction to China's pesticide industry, 2013–2015……...4
1.2 Position of metolachlor in China's herbicide industry ……..…6
2 Supply……...7
2.1 Production technology …… ……..…7
2.2 Registration as of 17 Oct., 2016 …… ……....9
2.3 Production, 2013–2015…… ……..……10
3 Circulation ……12
3.1 Prices of technical and formulations, 2011–2015……..…..12
3.2 Export, 2013–2015……..……14
4 Consumption, 2011–2015……...21
5 Forecast on output and demand, 2016–2020……23

LIST OF TABLES

Table 1.1-1 Output of chemical pesticides (calculated by 100% AI) in China by product category, 2013–2015, '000 tonne
Table 1.1-2 Consumption volume of pesticides (calculated by 100% AI) in China by product category, 2013–2015, tonne
Table 1.1-3 China's imports and exports of pesticides, 2013–2015
Table 1.2-1 Metolachlor's shares in China's herbicide industry by output and consumption, 2013–2015
Table 2.1-1 Comparison of different routes for producing metolachlor technical
Table 2.2-1 Registrations of metolachlor technical in China, as of 17 Oct., 2016
Table 2.2-2 Registrations of metolachlor formulations in China, as of 17 Oct., 2016
Table 2.3-1 Capacity and output of major metolachlor technical producers in China, 2013–2015
Table 3.2-1 China’s exports of metolachlor by month, 2015
Table 3.2-2 China’s exports of metolachlor by month, 2014
Table 3.2-3 China’s exports of metolachlor by month, 2013
Table 3.2-4 China’s export volume of metolachlor by destination, 2015, tonne
Table 3.2-5 China’s export volume of metolachlor by destination, 2014, tonne
Table 3.2-6 China’s export volume of metolachlor by destination, 2013, tonne
Table 3.2-7 China's export volume of metolachlor by exporter, 2015, tonne
Table 3.2-8 China's export volume of metolachlor by exporter, 2014, tonne
Table 3.2-9 China's export volume of metolachlor by exporter, 2013, tonne
Table 4-1 Consumption volume and market value of metolachlor formulations in China, 2011–2015
Table 5-1 Drivers and barriers for development of metolachlor industry in China, 2016

LIST OF FIGURES

Figure 1.1-1 Output share of chemical pesticide technical (calculated by 100% AI) in China by region, Jan.–Oct. 2015
Figure 2.1-1 Methoxyacetone route for producing metolachlor technical
Figure 2.1-2 2-Chlorine propanol route for producing metolachlor technical
Figure 2.1-3 2-Bromo-1-methoxyl propane route for producing metolachlor technical
Figure 2.3-1 Capacity and output of metolachlor technical in China, 2013–2015
Figure 3.1-1 Annual ex-works price of metolachlor 97% technical in China, 2011–2015
Figure 3.1-2 Monthly ex-works price of metolachlor 97% technical in China, Jan.–Oct. 2016
Figure 3.1-3 Annual ex-works price of metolachlor 720g/L EC in China, 2011–2015
Figure 4-1 Consumption volume of metolachlor formulations in China by crop, 2011–2015
Figure 4-2 Share of consumption volume of metolachlor formulations in China by crop, 2015
Figure 5-1 Forecast on output of metolachlor technical in China, 2016-2020
Figure 5-2 Forecast on demand and market value of metolachlor formulations in China, 2016-2020

1. Introduction

This report presents an overview of the supply and demand of metolachlor, a selective herbicide, in China as well as forecast on the future trends.

Metolachlor is featured by broad weeding spectrum, high effectiveness and wide applications. Previously, the metolachlor industry in China was developing at a fast pace. However, the growth seemed to have slowed down these years. From 2013 to 2015, the compound annual growth rate of metolachlor technical's capacity was negative, and in 2015 alone, both the capacity and output were decreasing compared with the previous year. In addition, there's a decrease in the consumption in 2015.

What's the detailed development situation of the industry behind these statistics? How will the industry go in the future years? This report will illustrate the details for readers through the following aspects:

- ✓ Product registration under the Institute for Control of Agrochemicals, Ministry of Agriculture, as of 17 Oct., 2016
- ✓ Production situation (capacity, output and key producers), 2013–2015
- ✓ Prices of technical and formulations of metolachlor , 2011–2015
- ✓ Export analysis, 2013–2015
- ✓ Domestic consumption, 2011–2015
- ✓ Forecast on output and demand, 2016–2020

2. Executive summary

Metolachlor is a selective herbicide with broad weeding spectrum, high effectiveness and wide application fields. According to statistics from the Institute for the Control of Agrochemicals, Ministry of Agriculture (ICAMA), as of 17 Oct., 2016, a total of XXX valid registrations of metolachlor have been licensed in China, including 16 for technical, XXX for single formulations and XXX for mixed formulations.

The metolachlor industry maintained relatively fast expansion in China in previous years. However, the growth seemed to have slowed down and even turned to be negative in recent three years. From 2013 to 2015, the capacity and output of metolachlor technical (calculated by 97% technical) posted opposite development trends–respective CAGRs were XXX and XXX. In 2015 alone, the figures both decreased compared with the previous year by XXX and XXX, respectively.

The number of producers of metolachlor technical is XXX in China, XXX in active production in 2015.

Metolachlor products made in China are export-oriented. During the past three years, the annual export volumes were increasing slightly at a CAGR of XXX. Growths in the volume of different specifications are different. There was an XXX in volumes of 96% technical and 960g/L ECXXX a XXX in those of 97% technical and 720g/L EC. The XXX in total export volumes indicates XXX in further exploiting the overseas market.

The domestic consumption volume of metolachlor formulations (calculated by 97% technical) is relatively small in China, the majority of which is applied in corn, vegetables & melons and soybean fields. It's noteworthy that there'sXXX a XXX in the consumption in 2015.

In 2016–2020, the output of metolachlor technical (calculated by 97% technical) and demand for formulations (calculated by 97% technical) as well as the market value (at ex-works level) would decrease at CAGRs of XXX, XXX and XXX respectively for two key reasons.

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3. Methodology and source

- Methodology

This report is drafted by diverse methods as follows:

(1) Desk research

The sources of desk research are various, including published journals, government statistics, industrial statistics, Customs statistics, as well as information from the Internet. Obtained information has been compiled and analyzed. When necessary, checks will be made with Chinese metolachlor suppliers regarding market information such as key producers, production and price trend, etc.

(2) Telephone interview

Extensive telephone interviews have been carried out in order to grasp the actual market situation of metolachlor in China.

Interviewees cover:
- Producers
- Traders

(3) Internet

CCM contacted with the players in this industry through B2B websites and software.

- Data processing and presentation

The data collected and compiled were sourced from:

- Published articles from periodicals, magazines and journals
- Statistics from governments and international institutes
- Telephone interviews with domestic suppliers, traders, industrial experts
- Third-party data providers
- Information from the Internet

Data obtained 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 made in order to analyze the data and have conclusions drawn.

4. What's in this report

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

2 Supply

2.3 Production, 2013–2015

Annual capacity of metolachlor technical stayed at around XXX t/a in China in the past few years.

2015 witnessed a XXX in both capacity and output of the product. There were XXX major active producers in the country, which are distributed in XXX Province.

Figure 2.3-1 Capacity and output of metolachlor technical in China, 2013–2015

Note: Calculated by 97% technical and based on capacities and outputs of the four active producers

Source: CCM

Table 2.3-1 Capacity and output of major metolachlor technical producers in China, 2013–2015

No.	Producer	Location	Status in 2015	2015		2014		2013	
				Capacity (t/a)	Output (tonne)	Capacity (t/a)	Output (tonne)	Capacity (t/a)	Output (tonne)
1									
2									
3									
4									
5									

Source: CCM

3 Circulation

3.1 Prices of technical and formulations, 2011–2015

From 2011 to 2015, the prices of both metolachlor technical and metolachlor formulations were XXX.

Specifically, the annual average ex-works price of metolachlor 97% technical XXX from USDXXX/t to USDXXX/t at a CAGR of XXX%. The one of metolachlor 720g/L, was also on a XXX trend during these years at a CAGR of XXX from USDXXX/t to USDXXX/t.

The key reason for XXX lies in the …

Figure 3.1-1 Annual ex-works price of metolachlor 97% technical in China, 2011–2015

Source: CCM

Figure 3.1-2 Monthly ex-works price of metolachlor 97% technical in China, Jan.–Oct. 2016

Source: CCM

Figure 3.1-3 Annual ex-works price of metolachlor 720g/L EC in China, 2011–2015

Source: CCM

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