

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

2 Market analysis of major fungicides

2.1 Mancozeb

- Brief introduction to mancozeb industry

Mancozeb, a member of ethylene-bis-dithiocarbamate (EBDC) fungicides, is used on a wide variety of food/feed crops, including tree fruits, vegetables, field crops, grape, ornamental plants and sod farms. Other applications include greenhouse grown flowers and ornamentals, as well as seed treatment.

Mancozeb was first registered in China in 1988 as a broad-spectrum fungicide used in agriculture, professional turf management, and horticulture. With its high efficiency and low toxicity, mancozeb shares a big pie in China's fungicide market. It is still one of the largest categories of fungicide in China. Approximately ■ tonnes of mancozeb is used annually, with the greatest use on orange and apple. Mancozeb is also used extensively on grape, onion, pear, tomato, squash, melon, etc.

Mancozeb is a broad-spectrum fungicide that controls early blight, late blight, anthracnose, rust, downy mildew, ring spot, alternaria spot, black spot, brown rot, fusarium, septoria leaf spot, etc. Competitive products of mancozeb are chlorothalonil, propineb, zineb, carbendazim, cymoxanil, etc.

Domestic output of mancozeb has been declining from 2009 to 2011. In 2011, the output of mancozeb takes up ■% of the total of all fungicides, down 0.52% compared with that in 2010. Though the proportion decreased from 2006 to 2011, it is still important in fungicide market.

- Registration situation of mancozeb

In China, mancozeb was first registered in 1988, and there were ■ mancozeb registrations from 1988 to 2000 in China. In 2006, the number of mancozeb registrations exceeded ■ for the first time.

As of Aug. 2012, there are totally ■ valid registrations of mancozeb in China obtained by ■ companies, including ■ technical, ■ single formulations and ■ mixed formulations. The mainstream formulation is ■% WP in China.

Table 2.1-1 Valid registrations of mancozeb in China, as of Aug. 2012

Category	Technical	Mixed formulation	Single formulation		
			WP	WDG	Others
Number	■	■	■	■	■

Source: ICAMA

- Production of mancozeb technical, 2008-H1 2012

China's total mancozeb output has been decreasing in recent years, with ■ tonnes in 2011, down ■% compared with that in 2010 due to the stricter supervision from Chinese government and the higher production cost than before 2008, In addition, domestic demand has declined during 2006-2011.

In H1 2012, 10 companies have been confirmed to be involved in the production of mancozeb technical, with the top three producers of Limin Chemical Co., Ltd., Nantong DAS Chemical Co., Ltd. and Hebei ShuangJi Chemical Co., Ltd., whose outputs are ■ tonnes, ■ tonnes and ■ tonnes in 2011, accounting for ■% of Chinese total.

In the near future, the production of mancozeb will be concentrated in some big producers, since they have good sales channels and technical advantage.

Table 2.1-2 Basic information of main mancozeb technical producers in China

No.	Company	Abbreviation	Location
1	Limin Chemical Co., Ltd.	Limin Chemical	Jiangsu
2	Nantong DAS Chemical Co., Ltd.	Nantong DAS	Jiangsu
3	Hebei ShuangJi Chemical Co., Ltd.	Hebei ShuangJi	Hebei
4	Xi'an MPC Stock Co., Ltd.	Xi'an MPC	Shaanxi
5	Jiangsu Nantong Baoye Chemical Co., Ltd.	Nantong Baoye	Jiangsu
6	Hebei Hesun Chemical Co., Ltd.	Hebei Hesun	Hebei
7	Shenyang Harvest Agrochemical Co., Ltd.	Shenyang Harvest	Liaoning
8	Shaanxi Andreap Biochemistry Ltd.	Shaanxi Andreap	Shaanxi
9	Shaanxi Xi'an Zhifeng Pesticide Factory	Shaanxi Zhifeng	Shaanxi
10	Henan Fukang Chemical Co., Ltd.	Henan Fukang	Henan

Source: CCM