

Survey of Metolachlor in China

The Fifth Edition

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1. Introduction

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

Metolachlor is featured by broad weeding spectrum, high effectiveness and wide applications. The metolachlor industry in China had a fast expansion in 2017, while it was relatively stable in 2015 and 2016. Specifically, from 2015 to 2016, the capacity of metolachlor technical was stable in China, while it increased a lot in 2017. Therefore, the output of metolachlor technical in China increased accordingly. However, the supply of metolachlor technical in China has become relatively tight in 2017 due to increasing demand from overseas market and stringent environmental inspection at home. It's worth to note that there are two potential metolachlor projects undergoing in China, one by Nantong Jiangshan Agrochemical & Chemicals Co., Ltd. and the other by Shandong Weifang Rainbow Chemical Co., Ltd. , with capacities of 1,000 t/a and 5,000 t/a respectively. As for the price, in 2017, the annual ex-works price of 97% metolachlor technical increased to about USD3,755.85/t, increasing by about USD150/t compared with that in 2016. In Feb. 2018, the ex-works price of metolachlor technical even rose to USD4,679.20/t in China.

What's the detailed development situation of the industry behind these statistics? What are the driving factors and barriers? 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 Aug. 2018
- Production situation (capacity, output and key producers), 2015–H1 2018
- Prices of metolachlor technical by month and annual, 2015–July 2018
- Export analysis, 2014–2017
- Domestic consumption, 2013–2017
- Forecast on supply and demand, 2018–2022

2. Approach

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 analysed. 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:

- a. Published articles from periodicals, magazines and journals
- b. Statistics from governments and international institutes
- c. Telephone interviews with domestic suppliers, traders, industrial experts
- d. Third-party data providers
- e. 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 analyse the data and have conclusions drawn.

3. 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 Aug. 2018, a total of XXXX valid registrations of metolachlor have been licensed in China, including XXXX for technical, XXX for single formulations and XXXX for mixed formulations.

The metolachlor industry in China had a fast expansion in 2017, while it was relatively stable in 2015 and 2016. And the capacity of metolachlor technical in China has XXXX to XXXX t/a since 2017. The output of metolachlor technical increased from about XXXX tonnes in 2015 to about XXXX tonnes in 2017, with a CAGR of about XXXX. Furthermore, as of Aug. 2018, there are still two new projects of metolachlor technical in China.

Metolachlor products made in China are export-oriented. During 2014–2017, the export volume of metolachlor (calculated by XXXX technical) in China XXXX from about XXXX tonnes in 2014 to about XXXX tonnes in 2017, with a CAGR of about XXXX%. Especially in 2017, the export volume XXXX by about XXXX% year on year.

Regarding metolachlor price in China, the prices of both metolachlor technical and metolachlor formulations were XXXX generally in 2014–2016. In 2017, the annual ex-works price of 97% metolachlor technical XXXX to about USDXXXX/t, increasing by about USDXXXX/t compared with that in 2016. In Feb. 2018, the ex-works price of metolachlor technical even XXXX to USDXXXX/t in China.

As to the downstream consumption of metolachlor technical in China, metolachlor technical is applied on crops through single formulations of 720g/L EC and 960g/L EC and mixtures of the product with bensulfuron-methyl, atrazine and mefenacet in the domestic market currently. And metolachlor is mainly applied on corn, vegetables, soybean and some other economic crops in China. The consumption volume of metolachlor technical in China saw decrease during 2014–2016, while that has gone upwards to XXXX tonnes in 2017. In 2017, the consumption volume of metolachlor technical in corn and vegetables accounted for more than XXXX of the total consumption volume in China.

With increasing demand at home and abroad, it's predicted that the output of metolachlor technical in China will increase in the next five years. But there are some barriers limiting the growth in output and demand of metolachlor in China. Therefore, it's unlikely to see too much increase in both output and demand in China during 2018–2022.

4. What's in this report?

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

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3.2 Production of metolachlor in China, 2015–H1 2018

These years, the capacity and output of metolachlor technical in China has enjoyed growth mainly thanks to the increasing demand from abroad. Though the capacity of metolachlor kept steady at about 23,300 t/a in China during 2015–2016, that has increased to 34,000 t/a since 2017. The output of metolachlor technical increased from about 16,000 tonnes in 2015 to about 30,000 tonnes in 2017, with a CAGR of about 36.93%. Furthermore, as of Aug. 2018, there are still two new projects of metolachlor technical in China.

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Figure 3.2-1 Capacity and output of metolachlor technical in China, 2015–H1 2018



Source: CCM

Table 3.2-1 Capacity of major metolachlor technical producers in China, 2015–H1 2018, t/a

| No. | Producer | Abbreviation | Location | Status, as of Aug. 2018 | H1 2018 | 2017 | 2016 | 2015 |
|-----|----------|--------------|----------|-------------------------|---------|------|------|------|
| 1 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 2 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 3 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 4 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 5 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |

Source: CCM

Table 3.2-2 Output of major metolachlor technical producers in China, 2015–H1 2018, tonne

| No. | Producer | Abbreviation | Location | H1 2018 | 2017 | 2016 | 2015 |
|-----|----------|--------------|----------|---------|------|------|------|
| 1 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 2 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 3 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 4 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |
| 5 | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX | XXXX |

Source: CCM

...

5 Consumption, 2014–2017

After experiencing decrease during 2014–2016, the consumption volume of metolachlor technical in China has edged higher to XXXX tonnes in 2017, with a growth rate of about XXXX% compared with that in 2016. 2015 witnessed an apparent decrease in the consumption volume, which is mainly due to China's implementation of policies on reducing usage of pesticides and the strong competition from S-metolachlor.

As a substitute of acetochlor in crop planting, metolachlor is becoming ...

...

Table 5-1 Application of metolachlor technical in China by crop, 2017

| Crops | Consumption volume, tonne | Share, % |
|--------------|---------------------------|----------|
| XXXX | XXXX | XXXX |
| Total | XXXX | XXXX |

Source: CCM

Figure 5-2 Application share of metolachlor technical in China by crop, 2017



Source: CCM

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

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