

# Survey of Acetochlor in China

The Fifth Edition

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**Kcomber Inc.**

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## 1. Introduction

As a traditional agricultural country, China attaches great importance to pesticides production and has become a key pesticide exporter in the world. Nowadays, China can produce more than 400 varieties of pesticides and export more than 400 varieties of pesticides abroad, among which around 200 are widely produced.

Acetochlor accounts for a large market share among selective herbicides applied in China. It can be used for pre-emergent control of annual weeds and some broadleaf weeds in the fields of corn, cotton, peanut, soybean, etc. There's a decline in the production of acetochlor technical China from 2014 to 2015. But in 2016, the domestic output of the product was sharply increased mainly because of the increasing demand for acetochlor from overseas market. Though in 2016, the technical output of acetochlor accounted for only no more than 2% of herbicides' total in China. But in fact, the acetochlor industry has been suffering a serious oversupply in China. Many producers have suspended their production or even chose to exit the industry. It is noteworthy that the trend still goes on.

How will this industry go in the coming years? This report presents an overview of acetochlor's production, consumption and price in China, as well as a forecast on the product's future trend. You definitely will get some refreshing information on the acetochlor industry from the report.

This report will illustrate the details for readers through the following aspects:

- Product registration, as of 28 Nov., 2018
- Production situation (technology, capacity, output and key producers), 2014–H1 2018
- Prices of acetochlor technical, 2013–Oct. 2018
- Export analysis, 2015–2017
- Domestic consumption, 2015–2017
- Forecast on output and demand, 2018–2022

## 2. Approach for this report

- **Methodology**

This report is drafted by diverse methods as follows:

### **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. Information obtained has been compiled and analysed. When necessary, checks will be made with players in China's acetochlor industry regarding market information such as key producers, production situation and trend of product price.

### **Telephone interview**

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

Interviewees cover:

- Producers
- Traders

### **Internet search**

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

The data collected and compiled were sourced from:

- Published articles from periodicals, magazines and journals
- Statistics from local 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 analyse the data and have conclusions drawn.

## Abbreviation

AI: active ingredient

EC: emulsifiable concentrate

EW: emulsion oil in water

OD: oil dispersion

SC: suspension concentrate

TC: technical material

WP: wettable powder

CAGR: compound annual growth rate

CCPIA: the China Crop Protection Industry Association

ICAMA: the Institute for the Control of Agrochemicals, Ministry of Agriculture of the People's Republic of China

## Unit

- Tonne: equals to metric ton in this report

- /t: per tonne

- t/a: tonne/annum, tonne per year

- USD: US dollar, currency unit in the US

- RMB: currency unit in China, also named yuan

Table USD/CNY exchange rates, Jan. 2013–Nov. 2018

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
2013	6.2787	6.2842	6.2743	6.2471	6.1970	6.1718	6.1725	6.1708	6.1588	6.1393	6.1372	6.1160	6.1920
2014	6.1043	6.1128	6.1358	6.1553	6.1636	6.1557	6.1569	6.1606	6.1528	6.1441	6.1432	6.1238	6.1428
2015	6.1272	6.1339	6.1507	6.1302	6.1143	6.1161	6.1167	6.3056	6.3691	6.3486	6.3666	6.4476	6.2288
2016	6.5527	6.5311	6.5064	6.4762	6.5315	6.5874	6.6774	6.6474	6.6715	6.7442	6.8375	6.9182	6.6425
2017	6.8918	6.8713	6.8932	6.8845	6.8827	6.8019	6.7772	6.7148	6.5909	6.6493	6.6300	6.6067	6.7662
2018	6.5079	6.3045	6.3352	6.2764	6.3670	6.4078	6.6157	6.8293	6.8347	6.8957	6.9670	-	-

Source: The People's Bank of China

### 3. Executive summary

Acetochlor accounts for a large market share among selective herbicides applied in China. Currently, it can be used for pre-emergent control of annual weeds and some broadleaf weeds in the fields of corn, cotton, peanut, soybean, etc.

According to the Institute for the Control of Agrochemicals, Ministry of Agriculture of the People's Republic of China (ICAMA), as of 28 Nov., 2018, there were XXX registrations of acetochlor in China, specifically, 31 for acetochlor technical, XXX for single formulations, and XXX for mixed formulations.

#### - Production

The acetochlor industry has been suffering a serious oversupply in China. In 2016, the national total output of acetochlor technical (calculated by 92% technical) was 36,000 tonnes with a year-on-year growth rate of XXX% mainly because of the increasing demand for acetochlor from overseas market in the same year; yet it reduced to XXX tonnes in 2017. As of H1 2018, the total capacity of acetochlor technical in China maintained at 90,000 t/a.

#### - Export

The total China's export volume of acetochlor showed a downtrend in 2013–2015, at a CAGR of XXX%. But in 2016, the export volume of acetochlor increased to XXX tonnes, with a year-on-year growth rate of XXX%. And in 2017, the export volume of acetochlor continued increasing to XXX tonnes. With regard to export destinations, XXX, XXX, XXX, XXX and XXX were the top five destinations of acetochlor exported from China during 2016–2017.

#### - Consumption

There haven't been large changes in the actual consumption of acetochlor formulations (calculated by 92% technical) in China; in 2017, it was XXX tonnes. In domestic market, corn, soybean and peanut are the top three crops in terms of consumption of acetochlor formulations.



#### 4. What's in this report?

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

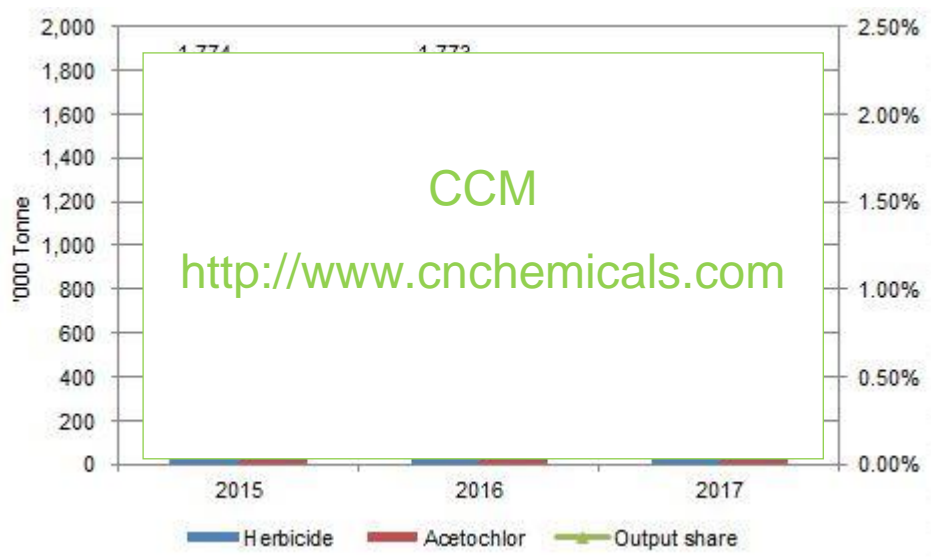
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#### 1.2 Position of acetochlor in China's herbicide industry

As a herbicide, acetochlor plays an important role in China's farming. It can be used for pre-emergent control of annual weeds and some broadleaf weeds in the fields of corn, cotton, peanut, soybean, etc.

The output share of acetochlor in the total herbicide output in China enjoyed expansion in the past three years (2015–2017). In 2017, the output of acetochlor accounted for XXX% of herbicides' total in China. (All data are calculated by 100% AI.)

Figure 1.2-1 Output volume and output share of acetochlor in herbicides industry in China, 2015–2017



Note: The data above are calculated by 100% AI.

Source: The National Bureau of Statistics of China & CCM

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## 2 Supply

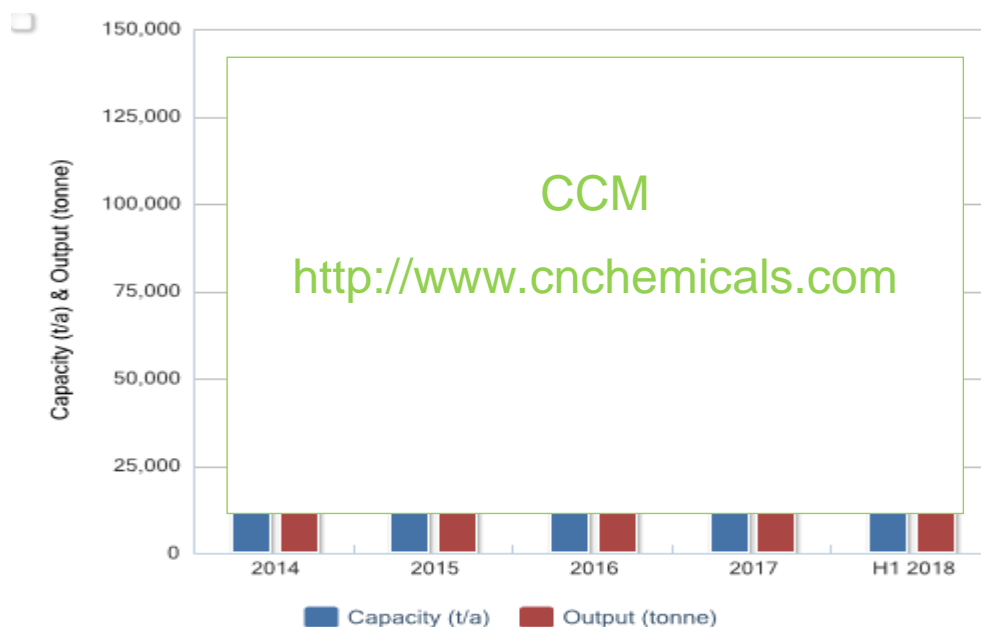
### 2.3 Production, 2014–H1 2018

The total capacity of acetochlor technical in China increased from XXX t/a in 2016 to XXXt/a in H1 2018. Nevertheless, its output experienced decrease, dropping from 36,000 tonnes in 2016 to XXX tonnes in 2017. And there were lots of acetochlor technical producers in China set their production lines into idle situation during 2017–2018. It is noteworthy that the trend still goes on.

There's a decline in the production of acetochlor technical (calculated by 92% technical) in China from 2014 to 2015. But in 2016, the domestic output of the product was XXX tonnes with a year-on-year growth rate of XXX% mainly because of the increasing demand for acetochlor from overseas market.

The domestic acetochlor industry experienced oversupply from 2014 to 2016. During this period, the ex-works price of acetochlor technical suffered decrease. And many producers have suspended their production or even chose to exit the industry.

Figure 2.3-1 Capacity and output of acetochlor technical (calculated by 92% technical) in China, 2014–H1 2018



Source: CCM

Table 2.3-1 Capacity and output of top five active acetochlor technical producers in China, 2017–H1 2018

No.	Producer	Production status, H1 2018	Capacity, t/a		Output, tonne	
			H1 2018	2017	H1 2018	2017
1	XXX	Active	XXX	XXX	XXX	XXX
2	XXX	Active	XXX	XXX	XXX	XXX
3	XXX	Active	XXX	XXX	XXX	XXX
4	XXX	Active	XXX	XXX	XXX	XXX
5	XXX	Active	XXX	XXX	XXX	XXX

Source: CCM

Figure 2.3-2 Distribution of active acetochlor technical producers in China by capacity, 2017

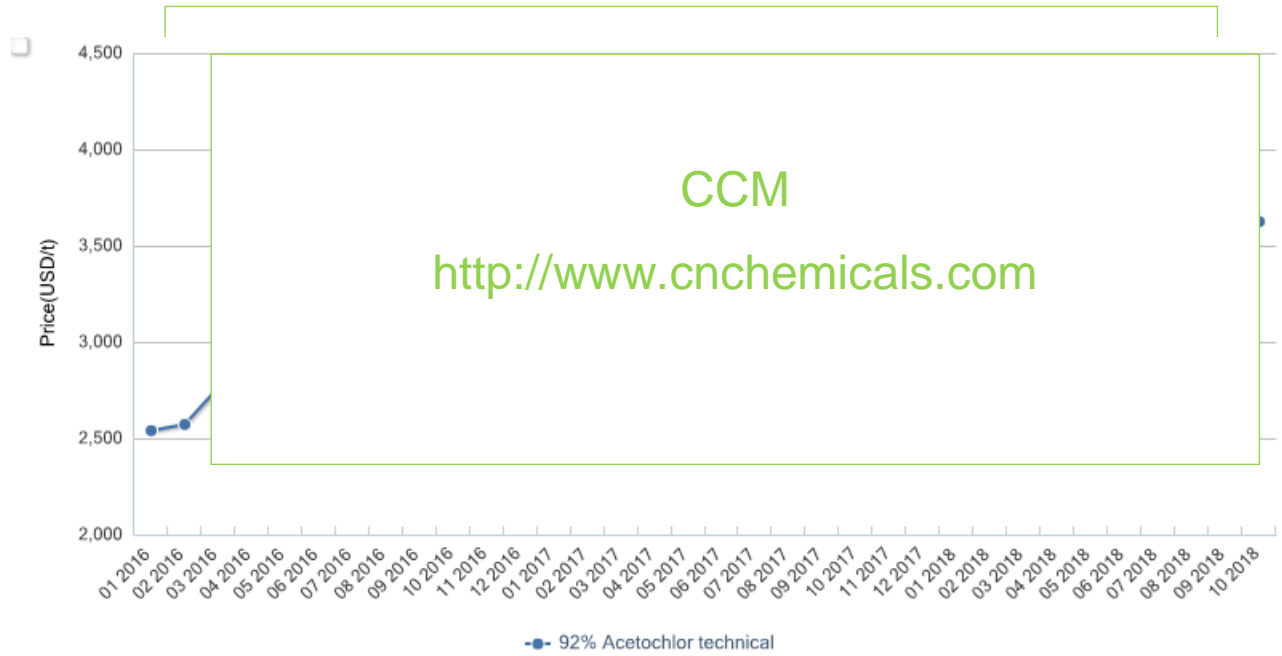


Source: CCM

### 3 Circulation

#### 3.1 Prices of acetochlor technical, 2016–H1 2018

Figure 3.1-2 Monthly ex-works price of 92% acetochlor technical in China, Jan. 2016–Oct. 2018



Source: CCM

### 3.2 Export, 2015–2017

#### 3.2.1 By month

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Table 3.2.1-1 China's exports of acetochlor technical and formulations by month, 2017

Month	Acetochlor 20% WP		Acetochlor 50% EC		Acetochlor 90% EC		92% Acetochlor technical		93% Acetochlor technical		94% Acetochlor technical		95% Acetochlor technical		97% Acetochlor technical	
	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
12	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
<b>Total</b>	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: China Customs & CCM

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### 3.2.2 By destination

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Table 3.2.2-1 China's exports of acetochlor technical and formulations by destination, 2017

No.	Destination	Acetochlor 20% WP		Acetochlor 50% EC		Acetochlor 90% EC		Acetochlor 990g/L EC		92% Acetochlor technical		93% Acetochlor technical		94% Acetochlor technical		95% Acetochlor technical		97% Acetochlor technical		Total quantity, tonne
		Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
30	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
<b>Total</b>		XXX	/	XXX	/	XXX	/	XXX	/	XXX	/	XXX	/	XXX	/	XXX	/	XXX	/	XXX

Source: China Customs & CCM

...

### 3.2.3 By exporter

...

Table 3.2.3-1 China's exports of acetochlor technical and formulations by exporter, 2017

No.	Exporter	Acetochlor 20% WP		Acetochlor 50% EC		Acetochlor 90% EC		Acetochlor 990g/L EC		92% Acetochlor technical		93% Acetochlor technical		94% Acetochlor technical		95% Acetochlor technical		97% Acetochlor technical		Total quantity, tonne
		Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
14	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
15	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Others		XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
<b>Total</b>		XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: China Customs & CCM

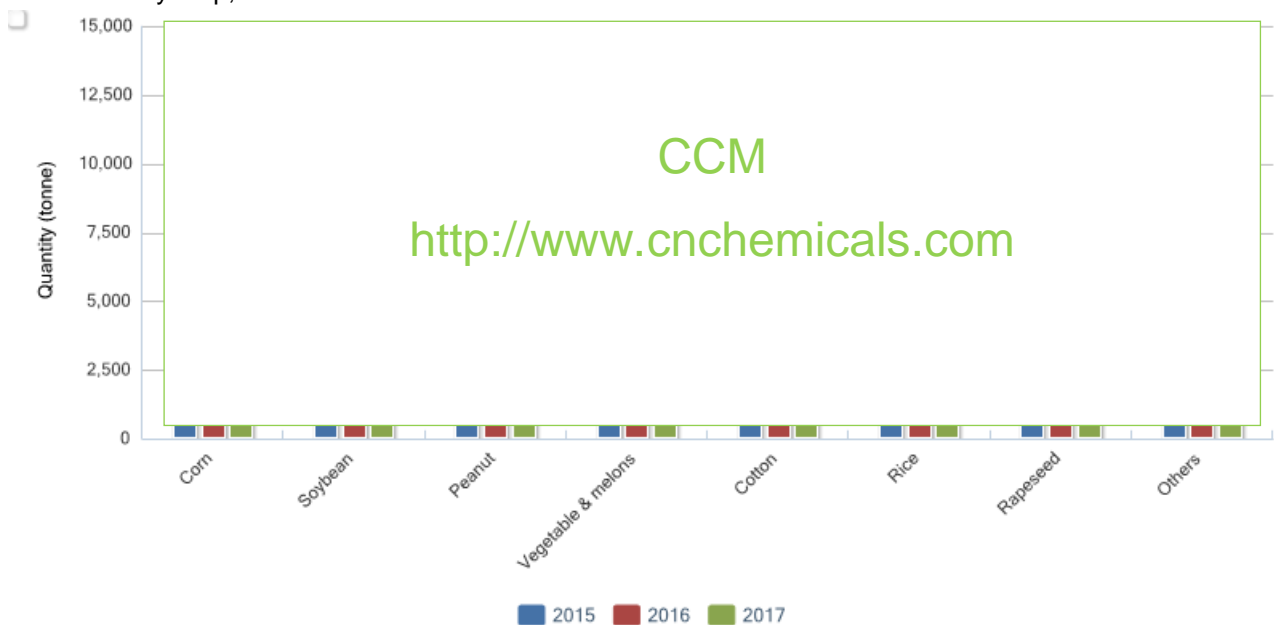
#### 4 Consumption, 2015–2017

Table 4-2 Actual consumption of acetochlor in China by type of formulations, 2015–2017

Year	Consumption volume, tonne					Market value, million USD			
	90% EC	50% EC	Others	Total	Total (calculated by 92% Tech)	90% EC	50% EC	Others	Total
2015	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2016	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2017	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM

Figure 4-1 Actual consumption of acetochlor formulations (calculated by 92% technical) in China by crop, 2015–2017



Source: CCM

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