



CCM Data & Business
Intelligence

Survey of Metolachlor in China

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Researched & Prepared by:

Kcomber Inc.

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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. During 2015–2020, the capacity and output of metolachlor technical in China enjoyed growth first, then followed a downtrend mainly due to decreasing demand from abroad. It is noteworthy that the pressure from environmental protection has been heavy in China in recent years. As a result, some metolachlor producers had to suspend production from time to time.

What's the detailed development situation of the industry? 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 and Rural Affairs, as of Dec. 2020
- Production situation (capacity, output and key producers), 2015–2020
- Prices of metolachlor technical by month and year, 2015–2020
- Export analysis, 2015–H1 2020
- Domestic consumption, 2015–2020
- Forecast on supply and demand, 2021–2025

2. Approach for this report

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 and Rural Affairs of the People's Republic of China (ICAMA), as of Dec. 2020, a total of XXXX valid registrations of metolachlor have been licensed in China, including XXXX for technical, XXXX for single formulations and XXXX for mixed formulations.

The metolachlor industry in China contracted with the capacity of metolachlor technical decreasing to XXXX t/a in 2019 and maintaining there in 2020. The output of metolachlor technical peaked in 2017, but slumped to about XXXX tonnes in 2020.

Metolachlor products made in China are export-oriented. Export volume of metolachlor (calculated by 97% technical) in China increased to about XXXX tonnes in 2017. After a slight dip in 2018, it plummeted to about XXXX tonnes in 2019, shrinking by XXXX% year on year.

Regarding metolachlor price in China, the prices of both technical and formulation products were on a general decrease in 2015–2016. However, metolachlor industry as a whole has shown signs of recovery entering 2017. Yet since Q2 2018, the price of metolachlor technical has maintained the downward path. The annual average ex-works price of 97% metolachlor technical was about USDXXXX/t in 2019, and dipped further to about USDXXXX/t in 2020, which was the bottom in the past five years.

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. And metolachlor is mainly applied on corn, vegetables, soybean and some other cash crops in China. In 2020, the consumption volume of metolachlor technical in China reached XXXX tonnes, up XXXX% year on year. The consumption of metolachlor technical in corn and vegetables accounted for more than XXXX% of the total consumption in China.

With increasing demand at home, it's predicted that the output of metolachlor technical in China will increase in the next five years. But there are also some barriers. Therefore, it's unlikely to see too much increase in both supply and demand in China during 2021–2025.

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, 2015–2020

During 2015–2020, the capacity and output of metolachlor technical in China enjoyed growth first, then followed a downtrend mainly due to decreasing demand from abroad. The capacity increased from XXXX t/a in 2015 to XXXX t/a in 2018, yet dipped to XXXX t/a in 2020. The output of metolachlor technical increased from about XXXX tonnes in 2015 to about XXXX tonnes in 2017, while that declined to about XXXX tonnes in 2018 and further to about XXXX tonnes in 2020. Specifically, in 2019, the output experienced a year-on-year XXXX% slump.

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Table 3.2-1 Capacity and output of major metolachlor technical producers in China, 2015–2020

No.	Producer	Location	Status, as of Dec. 2020	2020		2019		2018		2017		2016		2015	
				Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne	Capacity, t/a	Output, tonne
1	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
2	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
3	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
4	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
5	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX

Source: CCM

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5 Consumption, 2015–2020

In 2020, the consumption volume of metolachlor technical in China has edged higher to XXXX tonnes, with a growth rate of about XXXX% compared with that in 2019. Years before, 2015 witnessed a large decrease in domestic consumption, which is mainly attributed to implementation of policies on reducing pesticides use in China and strong competition from S-metolachlor.

As a substitute of acetochlor in crop planting, metolachlor is becoming popular in China at present due to its relatively safer properties. That has driven up the domestic consumption of metolachlor technical in China since 2017. But it's worthy to note that S-metolachlor, a strong competing product for metolachlor, though at higher price, has better performance and becomes popular among planters in China.

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Table 5-1 Application of metolachlor technical in China by crop, 2020

Crops	Consumption volume, tonne
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
XXXX	XXXX
Total	XXXX

Source: CCM

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

Tel: +86-20-37616606 Fax: +86-20-37616968

Email: econtact@cnchemicals.com