CCM Data & Business Intelligence

Overview of Pesticide Industry in China H1 2020

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1. Introduction

Entering 2020, as China's pesticide manufacturers gradually resumed production, domestic demand can be met, but export of pesticide products was hampered. In addition, increasingly strict environmental protection policies and safety production supervision resulted in a tight supply of pesticides. As of H1 2020, the down period of pesticide production was expected to be over, and the market shares of leading enterprises went up rapidly after mergers & acquisitions and capacity expansion.

In H1 2020, China's pesticide export volume and value both achieved increases as compared to a year ago. Pesticide exports achieved substantial year-on-year growth in April and May. Major pesticide categories have achieved growths both in export volume and value in H1 2020.

Till the end of H1 2020, China's pesticide industry had gone back on the right track in spite of the aftermaths of COVID-19 pandemic. Total domestic demand for pesticides in 2020 is expected to be basically the same as that in 2019, but the trend toward negative growth in pesticide use remains unchanged.

In this report, CCM will do overview of pesticide industry in China H1 2020 from the following aspects:

√ Pesticide supply situation in China

√ Overview of pesticide exports in China

√ Forecast of pesticide demand in China

√ Supply and demand of major pesticides

2. Approach for this report

The report is drafted by diverse methods as follows:

- Desk research

The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, customs statistics, association seminars as well as information from the Internet. A lot of work has gone into the compilation and analysis of the obtained information. When necessary, checks have been made with Chinese agrochemical players.

- Internet

CCM contacted with players in the domestic agrochemical industry through B2B websites and software as well as obtained registration information on the internet.

- Data processing and presentation

The data collected and compiled are sourced from:
- ✓ China Crop Protection Industry Association
- ✓ CCM's database
- ✓ Published articles in periodicals, magazines, journals and third-party databases
- ✓ Statistics from governments and international institutes
- ✓ Telephone interviews with domestic producers, joint ventures, service suppliers and governments
- ✓ Third-party data providers
- ✓ Comments from industrial experts
- ✓ Professional databases from other sources
- ✓ Information from the internet

The data 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 held in order to analyse the data and draw the conclusions.

3. Executive summary

In H1 20XX, global supply chain was disrupted and cost of raw materials for pesticide production increased due to the COVID-19 pandemic. As China's pesticide manufacturers gradually resumed production, domestic demand can be met, but export of pesticide products was hampered. In addition, increasingly strict environmental protection policies and safety production supervision resulted in a tight supply of pesticides.

Till the end of H1 20XX, China's pesticide industry had gone back on the right track. Total domestic demand for pesticides in 20XX is expected to be basically the same as that in 20XX, but the trend toward negative growth in pesticide use remains unchanged.

China's output of glyphosate technical was about XXX tonnes, and domestic demand exceeded XXX tonnes in H1 20XX. Glyphosate is mainly applied on food crops in China.

Due to the weak demand of the overseas market and high inventory of imidacloprid, the supply of imidacloprid in domestic market was relatively sufficient in H1 20XX, and the consumption by food crops accounted for XXX% of the total in China.

In Q1 20XX, the production of acetochlor technical was restricted due to the outbreak of COVID-19 pandemic, leading to tight supply of acetochlor technical. Although the supply did not increase much in Q2, the market demand for acetochlor technical gradually weakened when entering into the late stage of peak season. In H1 20XX, food crops consumed a large amount of acetochlor.

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 Pesticide supply situation in China

1.1 Overview of China's pesticide supply in H1 2020

Entering 20XX, global supply chain has been disrupted and cost of raw materials for pesticide production increased due to the COVID-19 pandemic. As China's pesticide manufacturers gradually resumed production, domestic demand can be met, but export of pesticide products was hampered. In addition, increasingly strict environmental protection policies and safety production supervision resulted in a tight supply of pesticides.

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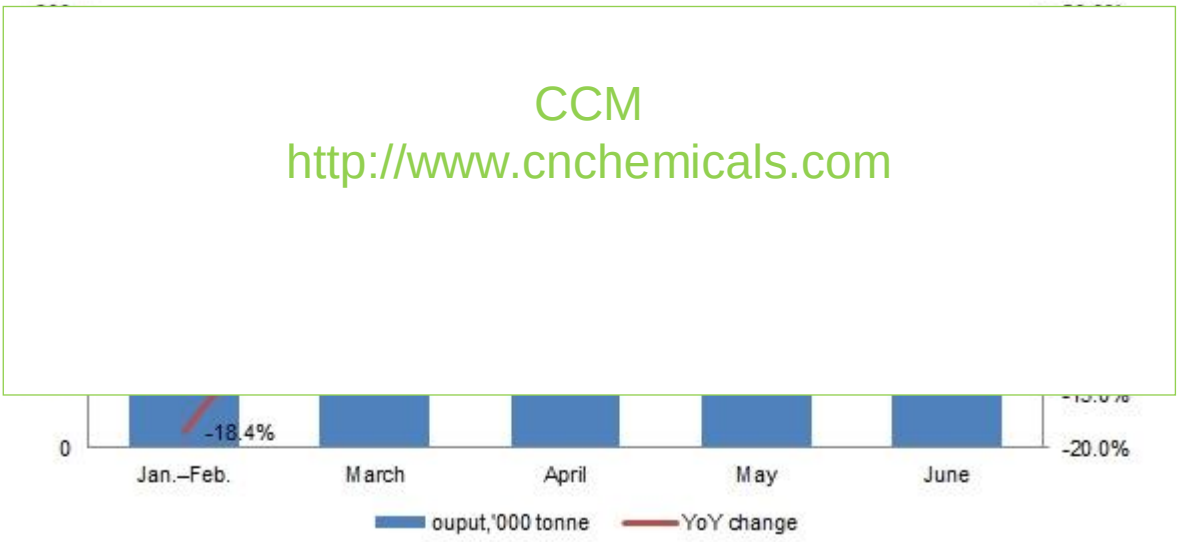
Figure 1.1-1 Output and growth of pesticide technical in China, H1 2020



Note: The output is converted into 100% AI.
Source: National Bureau of Statistics

1.2 Major manufacturers of pesticides in China

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As of H1 2020, the down period of pesticide production was expected to be basically over, and the market shares of dominant leading enterprises went up rapidly after mergers & acquisitions and capacity expansion.

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Table 1.2-1 List of 2020 China Top 20 Pesticide Enterprises

No.	Enterprise	Pesticide revenue in 2019, million RMB	Pesticide revenue in 2019, million USD
1	XXX	XXX	XXX
2	XXX	XXX	XXX
3	XXX	XXX	XXX
4	XXX	XXX	XXX
5	XXX	XXX	XXX
…	…	…	…
20	XXX	XXX	XXX

Source: The report Top 100 Pesticide Enterprises in China by CCM

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2 Overview of pesticide exports in China

2.1 Export volume and value of pesticide in H1 2020, by formulation

Thanks to the gradual resumed production in China and insufficient supply overseas, the export volume of pesticide from China increased further, and domestic enterprises are expected to catch greater market share.

Table 2.1-1 China's export value of pesticide, H1 2020

Formulation	Value, million USD	YoY change
Technical	XXX	XXX
Formulations	XXX	XXX
Total	XXX	XXX

Source: ICAMA & CCM

Table 2.1-2 China's export volume of pesticide, H1 2020

Formulation	Volume, '000 tonne	YoY change
Technical	XXX	XXX
Formulations	XXX	XXX
Total	XXX	XXX

Source: ICAMA & CCM

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4 Supply and demand of major pesticides

4.1 Glyphosate

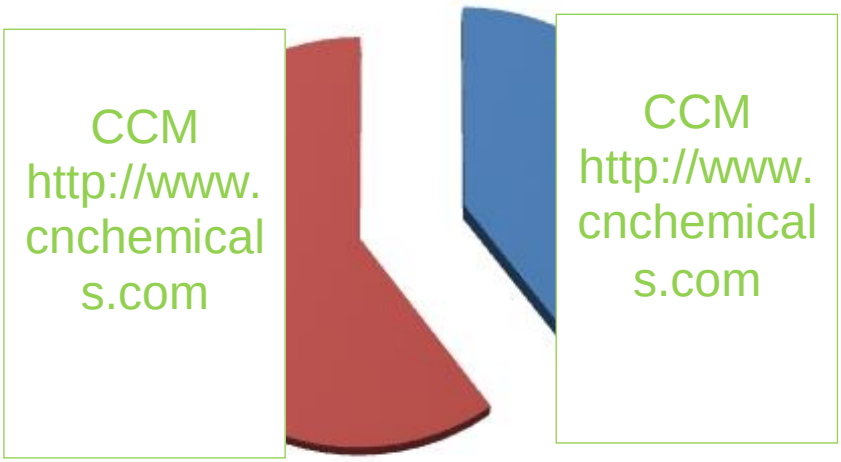
In Q1 20XX, the supply of glyphosate was not smooth due to the disruption of logistics and transportation. In Q2 20XX, glyphosate supply was in a tight situation affected by some manufacturers' failure of production resumption because of floods. In H1 20XX, China's output of glyphosate technical was about XXX tonnes, and the demand exceeded XXX tonnes.

The main manufacturers of glyphosate in China include XXX, XXX and XXX.

In H1 20XX, the consumption of glyphosate in China is mainly concentrated in food crops. Thereinto, the consumption shares of rice and corn accounted for XXX% and XXX% of the total respectively.

It's worth noting that the commercialization of domestic glyphosate-resistant genetically modified seeds has been accelerated, and glyphosate demand is expected to grow explosively by then.

Figure 4.1-1 Consumption share of glyphosate in China by crop category, H1 20XX



Source: CCM

Figure 4.1-2 Consumption share of glyphosate in China by crops, H1 2020

Source: CCM

Table 4.1-1 Major manufacturers of glyphosate in China, H1 20XX

No.	Manufacturer
1	XXX
2	XXX
3	XXX
…	XXX
10	XXX

Source: CCM

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