

Survey of Acetochlor in China

The Seventh Edition

February 2021

Researched & Prepared by:

Kcomber Inc.

Copyright by Kcomber Inc.

Any publication, distribution or copying of the content in this report is prohibited.

Contents

Executive summary.....	1
Methodology and source	2
1 Industrial overview	4
1.1 Brief introduction to pesticide industry in China.....	4
1.2 Position of acetochlor in China's herbicide industry	5
2 Supply	6
2.1 Production technology	6
2.2 Registration	8
2.3 Production, 2016–2020	9
3 Circulation	11
3.1 Price, 2016–2020.....	11
3.2 Export, 2016–2019.....	13
3.2.1 By month.....	13
3.2.2 By destination	17
3.2.3 By exporter	26
3.3 Export, Jan.–Nov. 2020.....	35
4 Consumption, 2015–2020.....	39
5 Outlook, 2021–2025	41

LIST OF TABLES

Table 1.1-1 China's imports and exports of pesticides and herbicides, 2016–2019
Table 1.2-1 Output volume and output share of acetochlor in herbicides industry in China, 2016–2019
Table 2.1-1 Comparison on quality of acetochlor technical between the two production routes adopted in China
Table 2.2-1 Registrations of acetochlor technical in China, as of 15 Jan., 2021
Table 2.2-2 Registrations of acetochlor formulations in China, as of 15 Jan. 2021
Table 2.3-1 Capacity and output of key acetochlor technical producers in China, 2018–2020
Table 3.2.1-1 China's exports of acetochlor technical and formulations by month, 2019
Table 3.2.1-2 China's exports of acetochlor technical and formulations by month, 2018
Table 3.2.1-3 China's exports of acetochlor technical and formulations by month, 2017
Table 3.2.1-4 China's exports of acetochlor technical and formulations by month, 2016
Table 3.2.2-1 China's exports of acetochlor technical and formulations by destination, 2019
Table 3.2.2-2 China's exports of acetochlor technical and formulations by destination, 2018
Table 3.2.2-3 China's exports of acetochlor technical and formulations by destination, 2017
Table 3.2.2-4 China's exports of acetochlor technical and formulations by destination, 2016



Table 3.2.3-1	China's exports of acetochlor technical and formulations by exporter, 2019
Table 3.2.3-2	China's exports of acetochlor technical and formulations by exporter, 2018
Table 3.2.3-3	China's exports of acetochlor technical and formulations by exporter, 2017
Table 3.2.3-4	China's exports of acetochlor technical and formulations by exporter, 2016
Table 3.3-1	China's exports of acetochlor technical and formulations by month, Jan.–April 2020
Table 3.3-2	China's exports of acetochlor technical and formulations by destination, Jan.–April 2020
Table 3.3-3	China's exports of acetochlor technical and formulations by exporter, Jan.–April 2020
Table 3.3-4	China's exports of acetochlor by month & destination, May–Nov. 2020
Table 4-1	Apparent consumption of acetochlor technical in China, 2015–2020
Table 4-2	Actual consumption of acetochlor in China by crop, 2020

LIST OF FIGURES

Figure 1.1-1	Output and share of herbicides in China's pesticide industry, 2008–2019
Figure 2.1-1	Methylene route for producing acetochlor technical in China
Figure 2.1-2	Ether route for producing acetochlor technical in China
Figure 2.3-1	Capacity and output of acetochlor technical (calculated by 92% technical) in China, 2016–2020
Figure 2.3-2	Distribution of active acetochlor technical producers in China by capacity, 2020
Figure 3.1-1	Annual ex-works price of 92% acetochlor technical in China, 2015–2020
Figure 3.1-2	Monthly ex-works price of 92% acetochlor technical in China, Jan. 2019–Dec. 2020
Figure 4-1	Actual consumption pattern of acetochlor in China by crop, 2020
Figure 5-1	Supply (output) trend of acetochlor technical (calculated by 92% technical) in China, 2021–2025, tonne
Figure 5-2	Demand trend of acetochlor in China, 2021–2025, tonne

1. Introduction

In herbicide application nowadays, acetochlor still 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. As of 2020, the capacity of acetochlor technical in China decreased to about 87,000 t/a from 101,000 t/a. And the output of acetochlor technical in 2020 was 28,500 tonnes, witnessing about 6% increase compared with that in 2019.

How will this industry go in the coming years? This report presents an overview of production, consumption and price of acetochlor 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 15 Jan., 2021
- Production situation (technology, capacity, output and key producers), 2016–2020
- Prices of acetochlor technical, 2015–2020
- Export analysis, 2016–Nov., 2020
- Domestic consumption, 2015–2020
- Forecast on output and demand to 2025

2. Approach for this report

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, 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.

Data processing and presentation

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.

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 15 Jan., 2021, the number of registrations of acetochlor in China has increased to XXX from XXX in Jan. 2020. And the number of registrations of acetochlor technical in China decreased to XXX from XXX in Jan. 2020. As to the acetochlor formulations, there were XXX for single formulations and XXX for mixed formulations as of Jan. 2021, changing from XXX single formulations and XXX mixed formulations in Jan. 2020.

- Production

Though the capacity of acetochlor technical in China has seen some decrease these years, the total capacity is now still much larger than the output. As of 2020, the capacity of acetochlor technical in China decreased to about XXX t/a from XXX t/a. And the output of acetochlor technical in 2020 was XXX tonnes, witnessing about XXX compared with that in 2019. It's unlikely to see XXX in the capacity of acetochlor technical in China in the next five years (2021–2025).

- Export

The total export volume of China's acetochlor witnessed a XXX in 2017–2019, decreasing by XXX. Furthermore, in 2019, the export volume of acetochlor decreased to XXX tonnes, down by XXX compared with that in 2018. Ukraine, Thailand, Vietnam, South Africa and Pakistan were the top five destinations of acetochlor exported from China in 2019.

- Consumption

In 2020, the apparent consumption and actual consumption of acetochlor technical (calculated by 100% AI) kept steady compared with that of 2019. And the apparent consumption was about XXX tonnes (calculated by 100% AI). The actual consumption of acetochlor technical was about XXX tonnes (calculated by 100% AI).

Acetochlor is mainly applied in corn, soybean, vegetables, etc. In 2020, corn, soybean and peanut were the three major end users of acetochlor, accounting for about XXX, XXX, XXX respectively. With increasing planting areas of corn and soybean in China, more acetochlor technical will be needed in China in the five years to come.

Nevertheless, domestic demand for acetochlor technical in China may witness setbacks in the future. That's mainly because decreasing unit consumption of pesticide in crop planting has become mainstream in China these years. Moreover, acetochlor technical confronts with competitions from its

substitutes, such as metolachlor technical. Therefore, it's predicted that the demand for acetochlor technical in China will go through a XXX in 2024–2025.

4. What's in this report?

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

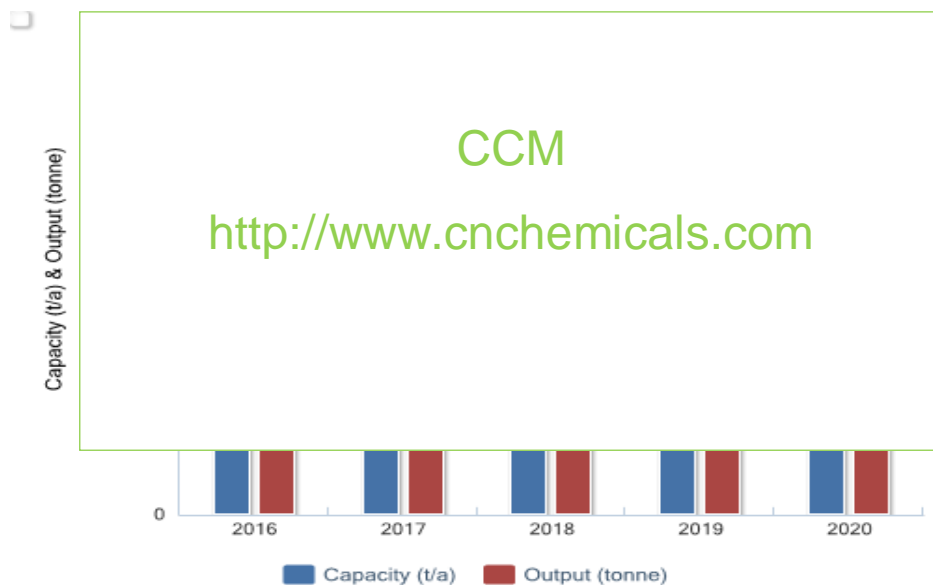
...

2.3 Production, 2016–2020

Though the capacity of acetochlor technical in China has seen some decrease these years, the total capacity is now still much larger than the output. As of 2020, the capacity of acetochlor technical in China decreased to about 87,000 t/a from 101,000 t/a. And the output of acetochlor technical in 2020 was 28,500 tonnes, witnessing about 6% increase compared with that in 2019.

...

Figure 2.3-1 Capacity and output of acetochlor technical (calculated by 92% technical) in China, 2015–2020



Source: CCM

...

3 Circulation

3.1 Price, 2016–2020

In 2018–2020, the annual ex-works price of acetochlor technical in China decreased from XXX in 2018 to XXX. Though the monthly ex-works price of acetochlor technical saw dramatic growth in XXX and XXX respectively because of tight supply, the average annual ex-works price still witnessed downtrend in China in 2020 with oversupply of acetochlor technical and price competition among producers.

.
...

Figure 3.1-1 Annual ex-works price of 92% acetochlor technical in China, 2015–2020



Source: CCM

Figure 3.1-2 Monthly ex-works price of 92% acetochlor technical in China, Jan. 2019–Dec. 2020



Source: CCM

4 Consumption, 2015–2019

In 2020, the apparent consumption and actual consumption of acetochlor technical (calculated by 100% AI) kept steady compared with that of 2019. And the apparent consumption was about XXX tonnes (calculated by 100% AI). The actual consumption of actochlor technical was about XXX tonnes (calculated by 100% AI).

...

Table 4-1 Apparent consumption of acetochlor technical in China, 2015–2020

Year	Output (calculated by 92% technical), tonne	Output (calculated by 100% AI), tonne	Export (calculated by 100% AI), tonne	Apparent consumption (calculated by 100% AI), tonne
2015	XXX	XXX	XXX	XXX
2016	XXX	XXX	XXX	XXX
2017	XXX	XXX	XXX	XXX
2018	XXX	XXX	XXX	XXX
2019	XXX	XXX	XXX	XXX
2020	XXX	XXX	XXX	XXX

Note: The export volume in 2020 is evaluated according to the actual consumption, output and stock evaluation.

Source: China Customs & CCM

Table 4-2 Actual consumption of acetochlor in China by crop, 2020

Crops	Consumption volume (calculated by 100% AI), tonne
Corn	XXX
XXX	XXX
...	...
XXX	XXX

Source: CCM

...

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

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

Email: econtact@cnchemicals.com