

Survey of Pesticide Industry in China

The Seventh Edition

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Researched & Prepared by:

Kcomber Inc.

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1. Introduction

China is a large pesticide supplier in the world, engaged in producing a wide variety of pesticides. In recent years, China's pesticide industry has heavily influenced by the government's policies and regulations. It's worthy to note that, in 2015, the Ministry of Agriculture of the People's Republic of China issued *The Action Plan for Zero Growth in the Application of Fertilizer and Pesticide by 2020*. This policy has driven down the supply and demand of chemical pesticides these years. During 2017–2018, many more policies and regulations concerning environmental protection had been introduced, mainly targeting pesticide industry, including *Measures for the Administration of the Recovery and Disposal of Pesticide Packaging Waste (Consultation Paper)*, three-year action plan for cleaner air, *Soil Pollution Prevention and Control Law of the People's Republic of China*. It's believed that the output of chemical pesticides as well as the demand will be on the decrease continually in China in the future.

In 2017, driven by policies, prices of pesticides witnessed sharp increases, and some pesticides technical were in short supply in China. The pesticide industry boomed significantly, which can be evidenced by the top 100 pesticide enterprises' great improving performance. In 2017, the top 100 pesticide enterprises enjoyed a total revenue amounting to about USD24.07 billion (RMB154.26 billion), increasing by 40.40% year on year, an increase of 34.59 percentage points over the previous year. The last enterprise in the list of top 100 pesticide enterprises had revenue of USD60.47 million (RMB387.5 million), rising by 27.89% year on year. By contrast, the output and demand of pesticide products have generally witnessed downtrend these years.

So as to explore the history and future of pesticide industry in China, CCM has done deep research on this field. Many reports on pesticide products have been generated during 2017–2018. Those reports have been collected to compile the 2018 edition, which is based on *Survey of Pesticide Industry in China 2017*, too. In the *Survey of Pesticide Industry in China 2018*, the following information will be unfolded to you:

Historical market analysis—a full market commentary provides a comprehensive understanding of Chinese pesticide industry. The development information is presented in a broad range of ways, such as supply, key producers and price. In this report, CCM chose 15 pesticides for deep research and those pesticides were highly paid attention to in pesticide industry in 2017–2018 according to CCM's investigation.

And the whole trend of pesticide industry in China has been unfolded in this report from the following aspects:

- Supply and demand
- Policies and regulations
- Production and key suppliers in China's pesticide industry
- Key commercial affairs in pesticide market in China
- Crop cultivation
- Price trend of pesticides in China

2. Approach for this report

- Desk research

The sources of desk research are various, including published magazines, journals, government statistics, industrial 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.

- Data processing and presentation

The data collected and compiled were sourced from:

- Published articles from Chinese periodicals, magazines, journals, and the third-party databases
- Government statistics & customs statistics
- Comments from industrial experts
- CCM's innovative database
- Professional databases from other sources
- Information from the internet

- Telephone investigation

The interviewees included the following groups:

- Key producers
- Key end users
- Key traders
- Material suppliers
- Associations involved
- Industry experts

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

The output of chemical pesticides has witnessed downtrend since 2016 in China. And it's worthy to note that, in 2015, the Ministry of Agriculture of the People's Republic of China issued the *Action Plan for Zero Growth in the Application of Fertilizer and Pesticide by 2020*. This policy has driven down the supply and demand of chemical pesticides these years. It's believed that the output of chemical pesticides as well as the demand will be on the decrease continually in China in the future.

China's herbicide industry has developed rapidly in recent years, which is reflected by sharply increasing output and the growing number of varieties available. China is now the major global herbicide supplier. Its herbicide output (calculated by 100% technical) reached XXX tonnes in 2017, retaining its top position in the world. China produces over XXX kinds of insecticide technical active ingredients (AIs) and over XXX types of insecticide formulations. Among all insecticides, organic insecticide ranks first by output in China, accounting for over XXX% of the total. In recent years, domestic market of most biological insecticides has expanded quite slowly, due to relatively high product prices and insufficient promotion. As for fungicide technicals, China produced XXX tonnes of fungicides in 2017. Compared with insecticides and herbicides, varieties of fungicides produced in China are limited. Traditional fungicides like mancozeb and carbendazim are the key species. With farmers' growing preference to cash crops, such as vegetables, flowers, and fruits, fungicides' output and species will grow in the future.

As a major driving force for pesticide consumption, crop planting area in China was over XXX million ha in 2014–2017 though the planting area in China saw slight decrease in 2017. The total cultivation area of crops in China hit XXX million ha in 2016, a record high in recent ten years. But crop cultivation area is less likely to expand in the future, as more and more land is being used for urbanization. And the crop planting area came down in China in 2017.

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 Overview of China's pesticide industry

1.1 Supply and demand of pesticides in China

1.1.1 Supply and demand

The output of chemical pesticides has witnessed downtrend since 2016 in China. And it's worthy to note that, in 2015, the Ministry of Agriculture of the People's Republic of China issued *The Action Plan for Zero Growth in the Application of Fertilizer and Pesticide by 2020*. This policy has driven down the supply and demand of chemical pesticides these years. It's believed that the output of chemical pesticides as well as the demand will be on the decrease continually in China in the future.

Table 1.1.1-1 Output of chemical pesticide technical in China by region, 2018

No.	Region	Output, tonne
1	XXXX	XXXX
2	XXXX	XXXX
3	XXXX	XXXX
4	XXXX	XXXX
...
22	XXXX	XXXX
23	XXXX	XXXX
24	XXXX	XXXX

Source: The National Bureau of Statistics (NBS)

...

1.1.2 Producers

1.1.2.1 Number of producers

With recent years' industrial structure adjustment and development in pesticide industry in China, the number of domestic pesticide producers has been on the decline these years. The total number of pesticide producers was over XXX in China in 2014. However, only about XXX producers possessed the Three Certificates—Pesticide Registration Licence, Pesticide Production Licence and Pesticide Quality Standard Certificate. Among the qualified producers, about XXX were involved in technical business.

As of 2018, the number of pesticide producers decreased to about XXX. Among them, XXX were technical producers and XXX formulation producers, according to the Ministry of Industry and Information Technology of the People's Republic of China (MIIT). With strict management based on policies for production and environmental protection, most of those illegal pesticide producers without the licences have been washed out in recent years.

The number of pesticide producers will see continuous decrease in the following years. Based on the *Thirteenth Five-Year Plan of Pesticide Industry in China* issued by China Crop Protection Industry Association (CCPIA) in May 2016, the number would decrease by XXX up to 2020. And M&A activity in pesticide market is encouraged in China currently to further decrease the number effectively.

1.1.2.2 2018 China Top 100 Pesticide Enterprises

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Table 1.1.2.2-1 List of 2018 China Top 100 Pesticide Enterprises

No.	Enterprise	Pesticide revenue in 2017, million RMB	Pesticide revenue in 2017, million USD	Pesticide revenue in 2016, million RMB	Pesticide revenue in 2016, million USD	YoY change	Ranking in 2016	Ranking change
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
...
97	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
98	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
99	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
100	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
Total		XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX

Source: CCPIA & CCM

Table 1.1.2.2-2 Newly added pesticide enterprises in the 2018 list

No.	Enterprise	Pesticide revenue in 2017, million RMB	Pesticide revenue in 2017, million USD	Ranking
1	XXXX	XXXX	XXXX	XXXX
2	XXXX	XXXX	XXXX	XXXX
3	XXXX	XXXX	XXXX	XXXX
...
13	XXXX	XXXX	XXXX	XXXX
14	XXXX	XXXX	XXXX	XXXX

Source: CCPIA & CCM

Table 1.1.2.2-3 List of enterprises with annual growth rate of pesticide revenue exceeding 50%, 2017

No.	Enterprise	Pesticide revenue in 2017, million RMB	Pesticide revenue in 2017, million USD	Pesticide revenue in 2016, million RMB	Pesticide revenue in 2016, million USD	YoY change	Ranking
1	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
2	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
3	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
...
9	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
10	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX

Source: CCPIA & CCM

1.1.3 Typical pesticides

Table 1.1.3-1 Output of main pesticide technical in China, 2018

No.	Herbicide	Output, tonne	Insecticide	Output, tonne	Fungicide	Output, tonne
1	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
2	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
3	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
4	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX
5	XXXX	XXXX	XXXX	XXXX	XXXX	XXXX

Source: CCM

1.2 Policies and regulations

1.2.1 Historical China's pesticide industry policies

Characteristics of the pesticide industry in China

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