



China Pesticide Industry Report, 2012-2015

May 2013

STUDY GOAL AND OBJECTIVES

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

REPORT OBJECTIVES

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

METHODOLOGY

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications.

Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

INFORMATION SOURCES

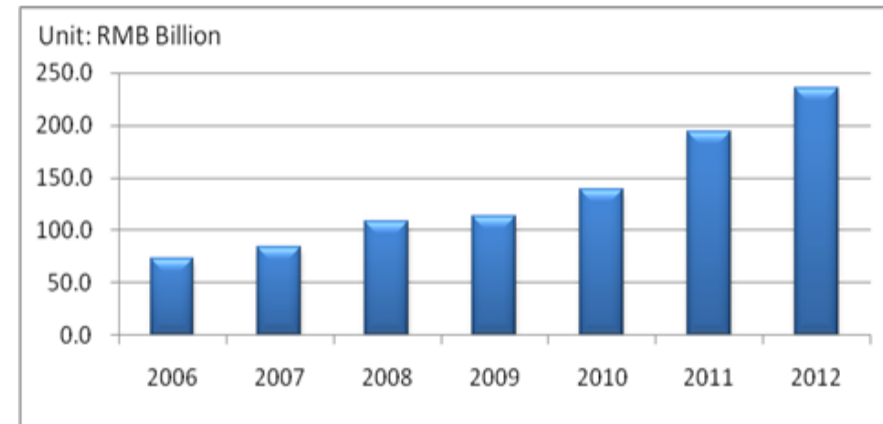
The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

Abstract

In recent years, China pesticide industry has shown sound development as a whole. In 2012, chemical pesticide API (converting into active ingredient) output of China increased by 34.0% year-on-year to 3.549 million tons, with the AAGR of 19.2% between 2005 and 2012. In 2012, the operating revenue of Chinese pesticide manufacturing surged by 21.2% year-on-year to RMB235.7 billion, while total profit reached RMB17.5 billion, presenting a 39.2% YoY rise.

In the pesticide industry, international division of labor has been shaped, with developed countries specializing in the R&D and production of new pesticide varieties as well as the production of pesticide preparations while developing economics such as China emerging as production bases of pesticide API. The global pesticide market has been monopolized by the six industrial leaders including Syngenta, Bayer and BASF, the combined market share of which approximates 85%. There are more than 2,000 pesticide makers in China, featuring low market concentration. For example, the operating revenue of domestic industrial players in 2012 such as Zhejiang Xinan Chemical Industrial Group, NANJING RED SUN and Jiangsu Yangnong Chemical hit RMB2.8321 billion, RMB2.7252billion and RMB2.0566 billion, respectively, occupying 1.2%, 1.2% and 0.9% in terms of market share.

Operating Revenue of Chinese Pesticide Manufacturing, 2006-2012



Source: NBS; ReserachInChina China Pesticide Industry Report, 2012-2015

Chinese pesticide companies are increasingly sharpening their edges through M&As, product mix adjustment and capacity expansion. As a result of pressing environmental protection call and anti-dumping investigation, the prices of pesticide commodities such as glyphosate and pyridine derivatives has been on a stable growth, greatly benefitting pesticide producers including Zhejiang Xinan Chemical Industrial Group, NANJING RED SUN, HUBEI SANONDA, and Jiangsu Yangnong Chemical. In addition, there is a small number of enterprises in the production of minor-use pesticides, but they enjoy higher profit margin. And some domestic players, such as Huapont-Nutrichem, become suppliers of API (like metolachlor, Tebuconazole, and Azoxystrobin) for international tycoons including Bayer and BASF.

The report highlights the followings:

Production, Sales, Import & Export and Operation of China Pesticide Industry;

Competition in the Pesticide Industry: Market Competition Pattern in China and Beyond, Industry Entry Barriers, and M&As;

Development Environment: Industry Supervision Policy, Industry Policy, Industry Chain, Upstream and Downstream Sectors;

Development Prospect: Production Pattern, Production Structure, Market Demand, Industrial Polices and Others

Production, Operation, Investment, M&A, Pesticide Business and Development Outlook of 12 Chinese Pesticide Companies.

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