China Pesticide Industry Report, 2016-2020

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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.

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Abstract

China's pesticide industry has weathered the rough time of "overcapacity, market downturn, weak demand, price decline, stringent environmental policies, and fierce competition" over the past two years. Due to a greater pressure from safety production and environmental protection, rising costs, tepid domestic and foreign demands, and prohibition of and restrictions on highly toxic pesticides, the industry has been running with lower product prices. Overall, the pesticide enterprises now make meager profits or barely break even.

China produced 3.741 million tons and sold 3.495 million tons of chemical pesticide APIs in 2015, edging down 0.1% and 2.2% from a year ago, respectively. In addition, output of pesticide preparations represented by herbicides, insecticides, and bactericides all fell over the same period in 2014, standing at 1.774 million tons, 514,000 tons, and 182,000 tons, down 1.6%, 8.5% and 20.8% respectively against the previous year.

Jiangsu is the country's largest pesticide production base, not only the largest API producing region but also a major production region of herbicides, insecticides, and bactericides. The province produced 1.055 million tons of pesticide APIs, 419,000 tons of herbicides, 205,000 tons of insecticides, and 91,000 tons of bactericides in 2015, making up 28.2%, 23.6%, 39.8%, and 49.7% of the country's total, respectively.

The Action Program for Zero Growth of Pesticide Utilization by 2020 issued by the MoA in 2015 specifies that pesticide utilization will be effectively controlled and new pesticides vigorously promoted so as to reduce consumption and harm of pesticides. The country's pesticide production and sales will maintain slight growth over a period of time, with chemical pesticide APIs reaching an estimated 3.768 million tons in production and 3.628 million tons in sales in 2020, respectively.

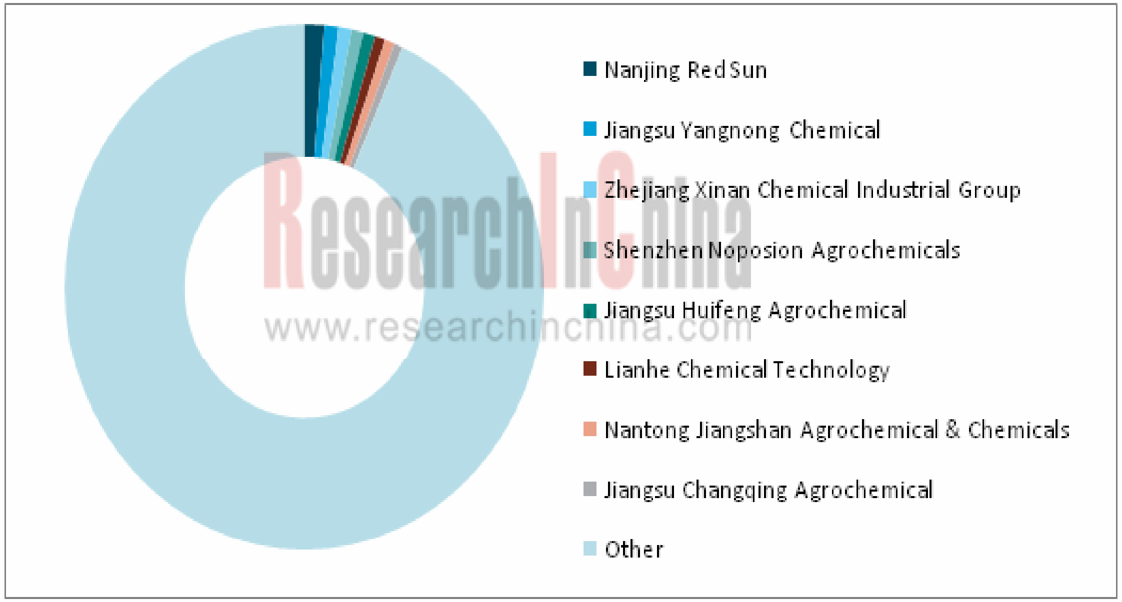
There are about 1,800 pesticide producers in China, represented by Nanjing Red Sun, Jiangsu Yangnong Chemical, Zhejiang Xinan Chemical Industrial Group, Shenzhen Noposion Agrochemicals, and Jiangsu Huifeng Agrochemical. The country's No. 1 pesticide enterprise has less than a 2 percent market share, showing a very low market concentration. As a series of measures on closing down backward production facilities and encouraging corporate merger and restructuring are implemented, the Chinese pesticide market concentration is expected to improve gradually.

With introduction of support policies including new environmental policy and the Planning for the Development of Pesticide Industry during the 13th Five-Year Plan Period, a quick penetration of new formats like agricultural inputs E-commerce and "Internet + agriculture", and rapid development of new models (farmers' cooperative, crop solutions), the pesticide industry will see an accelerated elimination of backward capacity, constantly enhanced industrial transformation and upgrading, and an increased industry concentration.

China Pesticide Industry Report, 2016-2020 highlights the following:

- Pesticide industry in China (production & sales, import & sales, operation, competitive landscape, etc.);
- Development environments (regulatory policies, industry policies, upstream & downstream sectors, etc.);
- Development trends;
- 16 major pesticide enterprises (operation, pesticide business, forecast & outlook, etc.)

Market Share of Major Pesticide Enterprises in China, 2016H1



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