

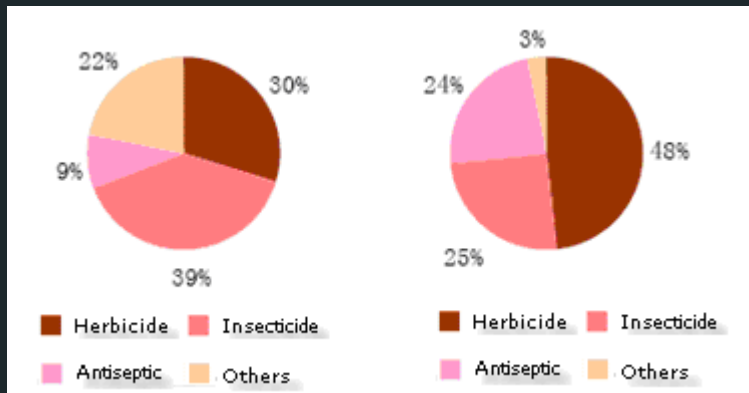
China Pesticide Industry Report, 2007-2008



In the past decade, the pesticide industry in China had developed rapidly, the pesticide output has almost doubled, and its variety increased by times as well. In 2007, with policy support and market stimulation, pesticide production still maintained rapid growth. However, as agricultural production relies much on season, the monthly output of pesticide fluctuated with season. Things are particularly true with the monthly output of antiseptic, gap between maximum and minimum was about 87.28 percentage points.

The accumulative output of raw chemical pesticide in China was 1.403 million tons from Jan to Oct of 2007, up 21.28% year-on-year, and the growth rate was down 0.88 percentage points compared to previous year. Meanwhile, the growth rate of accumulative output of herbicide accelerated, while the insecticide and antiseptic continued to drop. The accumulative antiseptic output in China amounted to 112,300 tons from Jan to Oct of 2007, rising 10.69% year-on-year, and the growth rate increased 6.98 percentage points compared to past year; the accumulative output of insecticide was 511,500 tons, ascending 10.66% year-on-year only, while down 5.06 percentage points year-on-year. What's more, the pesticide product structure was further improved from Jan to Oct of 2007, and the ratio of insecticide to total output of pesticide had dropped to 36.48%, declining 1.86% compared to the first half of year.

China Pesticide Product Structure (Left) & Global Pesticide Consumption Structure (Right)



It is forecasted that the total demand amount of pesticide will be 298,200 tons in China in 2008, nearly same to the 2007; and the demand of high-effective and low-poison insecticide in the pesticide market will be a bit down steadily, the demand of herbicide will be robust, the demand of antiseptic will be steady, and the total supply will be sufficient. The pesticide varieties with more than 10,000 tons demand amount all over China will include dichlorvos, acetochlor, copper sulfate, glyphosate, trichlorfon, disosultap etc, 5,000 to 10,000 tons varieties include phoxim, carbendazim, monosultap, butachlor, atrazine, omethoate, triophanate-methyl, chlorpyrifos, 2,4-D butyl ester, dimethoate, acephate etc. In addition, the provinces with more than 20,000 tons of pesticide demand amount are Heilongjiang and Hunan, and the following provinces are ranging from 10,000 tons and 20,000 tons, like Guangdong, Yunan, Shandong, Henan, Anhui, Hubei, Hebei, Jiangsu, Liaoning, Guangxi, Fujian, Jiangxi, and Zhejiang.

It is forecasted that the total demand amount of insecticide will be 140,100 tons in China in 2008, down 3.24% year-on-year; the demand of acaricide will rise dramatically, and the total amount will hit 10,600 tons, rising 15.84% year-on-year; the demand amount of antiseptic will be the same to previous year, and the total amount will be 76,000 tons; the demand of herbicide will still be robust, and the total demand amount will amount to 78,000 tons; the demand of rodenticide will rise year by year, and its demand amount will be 928.4 tons in 2008, increasing 20.64% year-on-year. Meanwhile, the demand amount of pesticide spraying machine will be a bit down in China in 2008, and the high-quality and high-efficient hand-operated sprayer will be popular among the farmers.

Sales (100 million Yuan) and Growth Rate of Pesticide in China



Guided by a series of policies concerning construction new rural areas, the pesticide industry in China will have good opportunity in the following five years. However, the favorable external environment only provides a kind of possibility, the leading factors that make the pesticide industry revive still is the internal reconstruction of industry and companies. We should not only enlarge the independent research and development, avoid the homogeneous war competition, and improve industry concentration through industry integration, but also controlling sales channel pesticide companies. From the development principle of international pesticide industry, the industry profit is switching to finished preparations and sales channel from raw material manufacturing. Currently, the majority of domestic pesticide companies are still in the level of chemical products manufacturing, so how to change the profitability mode is key to improve industry concentration and comprehensive competitiveness.

Seen from the policy environment, the documents, like Central Government's proposals on making the 11th Five-year Plan, National Guideline on Medium and Long-Term Program for Science and Technology, CPC Central Committee and State Council on further construction of a new socialist countryside etc, all show that pesticide industry has become the core topic. Combining the current situation of industry and relevant guiding policies, the 11th Five-year Plan of national pesticide industry will attach great importance to adjust the industry structure, enlarge the scientific research investment and control environment pollution. The adjustment policies of national pesticide industry structure will have crucial influence on the future trend of pesticide market, so the pesticide companies complying with national industry policies and adjusting the product structure in time will gain more profit in the future industry integration.

Table of Contents

- **1 Pesticide Industry**
 - 1.1 Definition and Classification
 - 1.2 Position in National Economy
 - 1.3 Investment Characteristics

- **2 Development of China's Pesticide Industry**
 - 2.1 Status Quo and Development
 - 2.2 Development of Pesticide Research
 - 2.3 China's Pesticide Market, 2006-2007
 - 2.4 Overall Operation of China's Pesticide Industry
 - 2.5 Statistics of Chemical Pesticide Manufacturing Industry by Province and Municipality, 2006-2007
 - 2.6 Statistics of Biological and Chemical Pesticide and Microbial Pesticide Manufacturing Industry in China and in Provinces and Municipalities, 2006-2007

- **3 Development of Pesticide Industry in Some Provinces**
 - 3.1 Zhejiang
 - 3.2 Shandong
 - 3.3 Anhui
 - 3.4 Jiangsu
 - 3.5 Hunan
 - 3.6 Other Provinces
 - 3.6.1 Yunan
 - 3.6.2 Henan
 - 3.6.3 Gansu

- **4 Key Pesticide Products Market**
 - 4.1 Insecticide Market
 - 4.2 Antiseptic
 - 4.3 Herbicide Market
 - 4.4 Biological Pesticide Market
 - 4.5 Development of Pesticide Intermediate
 - 4.6 Pesticide Preparations Development
 - 4.7 Development and Prospect of Pesticide Emulsifier in China
 - 4.8 Status Quo and Application Prospect of Pesticide Synergist Agent

- **5 Import and Export Market of Pesticide Industry**
 - 5.1 Status Quo and Problems of Pesticide in China
 - 5.2 Import and Export, 2006
 - 5.2.1 Import, 2006
 - 5.2.2 Export, 2006
 - 5.2.3 Export in Guangdong, 2006
 - 5.2.4 Export in Jiangsu, 2006
 - 5.3 Import and Export, 2007
 - 5.3.1 Import, 2007
 - 5.3.2 Export, 2007
 - 5.3.3 Forecast of Import and Export, 2008
 - 5.4 Pesticide Technology and Trade Barrier System Trend

- **6 Key Companies**
 - 6.1 Hubei Sanonda Ci., Ltd

6.1.1 Company Profile
6.1.2 Operation, 2006-2007
6.1.3 Latest Trend and Strategies
6.2 Nantong Jiangshan Agrochemical & Chemicals Co., Ltd
6.2.1 Company Profile
6.2.2 Operation, 2006-2007
6.2.3 Latest Trend and Strategies
6.3 Nanjing Red Sun Co., Ltd
6.3.1 Company Profile
6.3.2 Operation, 2006-2007
6.3.3 Latest Trend and Strategies
6.4 Jiangsu Yangnong Chemical Co., Ltd
6.4.1 Company Profile
6.4.2 Operation, 2006-2007
6.4.3 Latest Trend and Strategies
6.5 Zhejiang Qianjiang Biochemical Co., Ltd
6.5.1 Company Profile
6.5.2 Operation, 2006-2007
6.5.3 Latest Trend and Strategies
6.6 Shandong Huayang Pesticide Chemical Industry Group Co., Ltd
6.6.1 Company Profile
6.6.2 Operation, 2006-2007
6.6.3 Latest Trend and Strategies
6.7 Zhejiang Xinan Chemical Industry Group Co., Ltd
6.7.1 Company Profile
6.7.2 Operation, 2006-2007
6.7.3 Latest Trend and Strategies
6.8 Shandong Dacheng Pesticide Co., Ltd
6.8.1 Company Profile
6.8.2 Operation, 2006-2007
6.8.3 Latest Trend and Strategies
6.9 Anhui Huaxing Chemical Industry Co., Ltd
6.9.1 Company Profile

6.9.2 Operation, 2006-2007
6.9.3 Latest Trend and Strategies
6.10 Hunan Haili Chemical Industry Co., Ltd
6.10.1 Company Profile
6.10.2 Operation, 2006-2007
6.10.3 Latest Trend and Strategies

- **7 Development Environment of Pesticide Industry**

7.1 Policy Environment
7.2 New Regulations of Ministry of Agriculture Promulgated Standardizing Pesticide Registration Management, 2007
7.3 Competition Environment of Pesticide Companies

- **8 Demand Forecast and Development Trend of Pesticide Market in 2008 and the Followings**

8.1 Factors Influencing Pesticide Demand
8.1.1 Growing Area and Structure of Crops
8.1.2 Climate, Diseases and Insects
8.1.3 National Policies
8.2 Forecast of Agricultural Industry Demand, 2008
8.2.1 World's Insecticide Market Demand, 2008
8.2.2 New Development of Pesticide Industry in China
8.2.3 Forecast of Total Pesticide Demand Amount in China, 2008
8.2.4 Forecast of Pesticide Machine Demand in China, 2008
8.2.5 Market Prospect of lambda-cyhalothrin Products
8.3 Development of Pesticide in China

8.3.1 Green Pesticide
8.3.2 Development by Chemical Pesticide Industry,
2008

- **9 Problems and Suggestions of China's Pesticide Industry**

9.1 Existing Problems

9.2 Suggestions

- **10 Development Strategies of China's Pesticide Companies**

10.1 Development Strategies

10.2 New Strategies for Competitive Advantages

10.3 Investment Strategies of Pesticide Industry

10.4 Marketing Strategies

Appendix

Statistics of Output of Chemical Pesticide in China
and Provinces and Municipalities, 2006-2007

Statistics of Output of Chemical Insecticide in China
and Provinces and Municipalities, 2006-2007

Statistics of Output of Chemical Antiseptic in China
and Provinces and Municipalities, 2006-2007

Statistics of Output of Chemical Herbicide in China
and Provinces and Municipalities, 2006-2007

Selected Charts

Sales and Proportions of Pesticides in the World Market, 1960-2000

Sales and Proportions of Pesticides in the World Market, 2000-2004

Classification of Pesticides

Pesticides with More than 100 Millions US\$ of Sales in the World

World's Pesticides with Rapid Growth, 1998-2003

Herbicides Falling More than 10% in World Sales Market, 1998-2003

Insecticide Falling More than 10% in World Sales Market, 1998-2003

Antiseptic Falling More than 10% in World Sales Market, 1998-2003

Forecast of Sales and Growth Margin of World Pesticides, 2003-2008

Output Growth of China's Chemical Pesticide, 2001-2005

Total Output of Chemical Pesticide in China, Feb-Dec, 2006

Total Output of Chemical Pesticide in China, Feb-Jun, 2007

Top 100 Raw Pesticide Companies by Sales Revenue, 2005

Key 20 World Pesticide Companies

Top 100 Raw Pesticide Companies in China

Change of Profit Margin of Pesticide Industry, 2002-2005

Output of Key Pesticide Products in Zhejiang Province, Jan-Oct, 2006

Gross Profit Margin of China's Pesticide Intermediate Industry, 2002-2006

Statistics of Import of Insecticide, Antiseptic, Herbicide, Disinfector etc, Jan-Dec, 2006

Statistics of Export of Insecticide, Antiseptic, Herbicide, Disinfector etc, Jan-Dec, 2006

Statistics of Import of Insecticide, Antiseptic, Herbicide, Disinfector etc, Jan-Nov, 2007
Statistics of Export of Insecticide, Antiseptic, Herbicide, Disinfector etc, Jan-Nov, 2007
Output Growth of Insecticide in China, 2002-2006
Total Output of Insecticide in China, Feb-Dec, 2006
Total Output of Insecticide in China, Feb-Nov, 2007
Output Growth of Antiseptic in China, 2002-2006
Total Output of Antiseptic in China, Feb-Dec, 2006
Total Output of Antiseptic in China, Feb-Nov, 2007
Output Growth of Herbicide in China, 2002-2006
Total Output of Herbicide in China, Feb-Dec, 2006
Total Output of Herbicide in China, Feb-Nov, 2007
Areas of Key Corps in China, 2004-2005
Profit Distribution of Hubei Sanonda Ci., Ltd, 2006-2007
Main Business Structure of Nantong Jiangshan Agrochemical & Chemicals Co., Ltd, 2006-2007
Main Business Structure of Nanjing Red Sun Co., Ltd, 2006-2007

How to Buy

Product details			How to Order
Single user	USD	File	By email: report@researchinchina.com
	2,000	PDF	By fax: 86-10-82600829
Enterprisewide	3,000	PDF	By online: www.researchinchina.com
Publication date: Jan. 2008			
For more information, call our office in Beijing, China: Tel: 86-10-82600828 Website: www.researchinchina.com			