

Overview of China's pesticide industry

China's pesticide output continuously increases in the last decade, with CAGR (2001-2009) of █%. China's pesticide output reaches █ million tonnes in 2009, up █% year on year. The output value in China hit about USD █ billion (RMB █ billion), up █% year on year.

Pesticide export and import

At present, China exports pesticides to over 160 countries and regions all over the world. The export volume grows with CAGR (2001-2009) of █% to █ tonnes in 2009. Meanwhile the export value increases with CAGR (2001-2009) of █% to USD █ million in 2009. But actually export value in 2009 drops by █% than that of 2008, due to export dumped price under the context of global economic crisis. Herbicide now is the largest category for export in China, and its export volume accounts for over █% of the total volume in 2009.

Future outlook

According to the draft content of 'Pesticide Industry Policy' in China, Chinese government has drafted the outline of China's pesticide industry in the near five to ten years:

- ✓ The number of total producers to cut by █%;
- ✓ Top 20 producers to capture █% of total market share in China;
- ✓ To relocate █% production capacity into industrial park; each producer's R&D investment to raise to █% of annual sales revenue;
- ✓ Domestic innovative products to account for █% of total export volume;
- ✓ Waste discharge volume to cut by █%; well-known trademarks and brands to account for █% in domestic market.

Table 1 Situation of main herbicides in China, 2010

| Herbicides | Capa. '10, t/a | Output '09, t | Output value '09, million USD | Top producers |
|--------------------|----------------|---------------|-------------------------------|---------------|
| Glyphosate | █ | █ | █ | █ |
| Paraquat | █ | █ | █ | █ |
| Atrazine | █ | █ | █ | █ |
| Acetochlor | █ | █ | █ | █ |
| Butachlor | █ | █ | █ | █ |
| Quizalofop-P-ethyl | █ | █ | █ | █ |
| Nicosulfuron | █ | █ | █ | █ |

Table 2 Situation of main insecticides in China, 2010

| Insecticides | Capacity, t/a, | Output, tonne, | Output value, Million USD,2009 | Top 3 manufacturers |
|-------------------|-------------------|-------------------|---|------------------------|
| | 2010 | 2009 | | |
| Acephate | ██████ | ██████ | ██████ | ██████ |
| DDVP | ██████ | ██████ | ██████ | ██████ |
| Chlorpyrifos | ██████ | ██████ | ██████ | ██████ |
| Trichlorfon | ██████ | ██████ | ██████ | ██████ |
| Phoxim | ██████ | ██████ | ██████ | ██████ |
| Imidacloprid | ██████ | ██████ | ██████ | ██████ |
| Beta-cypermethrin | ██████ | ██████ | ██████ | ██████ |
| Dimethoate | ██████ | ██████ | ██████ | ██████ |
| Abamectin | ██████ | ██████ | ██████ | ██████ |
| Total | ██████ | ██████ | ██████ | ██████ |

Table 3 Situation of main fungicides in China, 2010

| Fungicide | Capacity '10, t/a | Output '09, t | Output value '09, Million USD | Top 3 producers |
|--------------------|-------------------|---------------|----------------------------------|-----------------|
| Mancozeb | ██████ | ██████ | ██████ | ██████ |
| Carbendazim | ██████ | ██████ | ██████ | ██████ |
| Chlorothalonil | ██████ | ██████ | ██████ | ██████ |
| Thiophanate Methyl | ██████ | ██████ | ██████ | ██████ |
| Tebuconazole | ██████ | ██████ | ██████ | ██████ |
| Prochloraz | ██████ | ██████ | ██████ | ██████ |
| Triadimefon | ██████ | ██████ | ██████ | ██████ |

Table I-3.2 Output of pesticide technical, 1994-2009, tonne

| Year | Insecticide | Herbicide | Fungicide | Total |
|------|-------------|-----------|-----------|-------|
| 1994 | | | | |
| 1995 | | | | |
| 1996 | | | | |
| 1997 | | | | |
| 1998 | | | | |
| 1999 | | | | |
| 2000 | | | | |
| 2001 | | | | |
| 2002 | | | | |
| 2003 | | | | |
| 2004 | | | | |
| 2005 | | | | |
| 2006 | | | | |
| 2007 | | | | |
| 2008 | | | | |
| 2009 | | | | |

Table I-3.8 New registration of pesticide formulations in China, 2006-2008

| Specification | 2006 | | 2007 | | 2008 | |
|----------------|--------|----------|--------|----------|--------|----------|
| | Number | Rate (%) | Number | Rate (%) | Number | Rate (%) |
| EC | | | | | | |
| SP | | | | | | |
| SL | | | | | | |
| SC | | | | | | |
| ME | | | | | | |
| EW | | | | | | |
| WDG | | | | | | |
| GR | | | | | | |
| Seed treatment | | | | | | |
| Others | | | | | | |
| Total | | | | | | |