

China Insecticide Trade Flows 2016

The Second Edition

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1. Introduction

In 2015, global trade flows of insecticides had changed in some extent. China's export of insecticide technical decreased in 2015, due to the shrinking global demand for insecticides, especially in South Africa which was badly affected by drought. China's export of insecticide formulations also showed a downtrend in 2015.

To clearly describe China's trade flows of insecticide in global market and give some constructive opinions, CCM has collected lots of information in various ways. In this report, export situation of insecticide has been described in detail, mainly from aspects such as technical and formulations, major products, major varieties, etc.

In this report, China insecticide trade flows has been analyzed exhaustively from the following aspects:

- Import and export situation of insecticides in China, 2015;
- Import and export situation of insecticide technical and formulations in China, 2015;
- Export situation of major insecticide products in China, 2015-H1 2016;
- Export price of major insecticide products in China, 2015-H1 2016;
- Strategy adjustments of suppliers of insecticides in China;
- Key factors for the development of insecticides in China;
- Commercial opportunities.

2. Approach for the report

The report is drafted by diverse methods and sources as follows:

✓ Desk research

Desk research for this report is mainly to do cross check for the data and information in this report and determine the report content. 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 compiling and analyzing the data and information obtained.

✓ Telephone interviews

To understand China's pesticide market better, CCM did telephone interviews with manufacturers, data suppliers, researchers, associations and governments.

✓ Data processing and presentation

The data in this report were mainly sourced from:

- China Customs

Data in the report are mainly from China Customs.

- CCM's database

Part of the data like specific pesticides in the report is mainly from CCM's database. The data in CCM's database were sourced from:

- Published articles from periodicals, magazines and journals, the third-party database

- Statistics from governments and international institutes

- Telephone interviews with domestic producers, joint ventures, service suppliers, government

- Third-party data providers

- Comments from industrial experts

- China Customs

- Professional database in other sources

- Information from the Internet

The data from various channels have been combined to the final data as precise and scientific as possible. Throughout the process, a series of internal discussions took place in order to analyze the data and draw conclusions from it.

3. Executive summary

In China, the research of synthesized pesticides began in 1930. After more than 80 years of development, the production technology of insecticides is considerably mature. However, insecticides produced in China are mostly of high toxicity and weak safety to environment in the past years. As more and more policies enhance the environmental standards in China in 2009-2015 and domestic demands are diversified, domestic enterprises have to increasingly import insecticides from other countries such as France, South Korea, India and the US. In 2015, China imported xxxx tonnes of insecticides (by physical quantity) in all, up xxxx% YoY, with an import value of USDxxxx million, up xxxx% YoY.

Meanwhile, China's export of insecticide technical decreased in 2015, due to the shrinking global demand for insecticides, especially in South Africa which was badly affected by drought. China's export of insecticide formulations also showed a downtrend in 2015. China's total export volume of insecticides in 2015 reached xxxx tonnes (by physical quantity), registering a moderate YoY decrease of xxx%. And the export value of insecticides was USDxxxx million, decreasing by xxxx% YoY. Mainly due to the serious oversupply, the export price of insecticides dropped greatly, with technical and formulations decreasing by xxxx% and xxxx% respectively. Besides, China's export destinations of insecticides are mainly countries in Asia and South America, such as Brazil, Vietnam, India and Thailand.

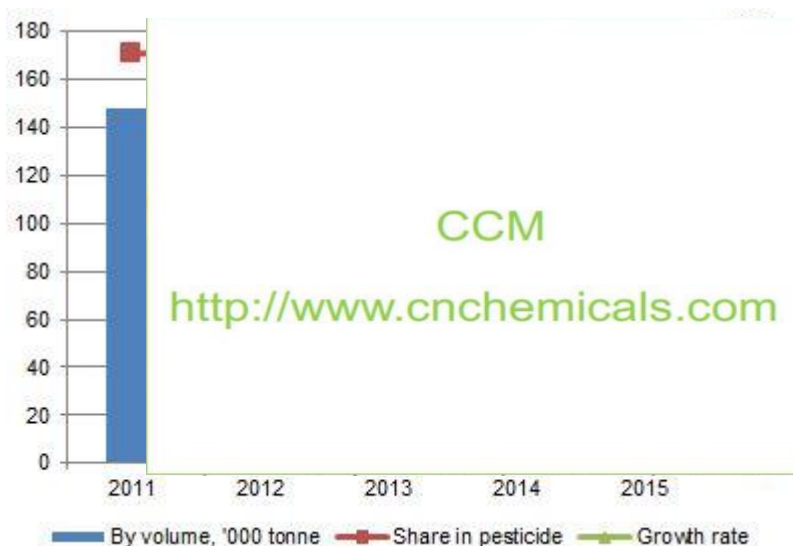
4. What is in the report?

Table 1.2-1 China's exports of insecticide technical and formulations, 2011-2015

Time	Total		Technical		Formulations	
	By volume, '000 tonne	By value, million USD	By volume, '000 tonne	By value, million USD	By volume, '000 tonne	By value, million USD
2011	xxx	xxx	xxx	xxx	xxx	xxx
2012	xxx	xxx	xxx	xxx	xxx	xxx
2013	xxx	xxx	xxx	xxx	xxx	xxx
2014	xxx	xxx	xxx	xxx	xxx	xxx
2015	xxx	xxx	xxx	xxx	xxx	xxx

Source: China Customs, ICAMA and CCM

Figure 1.2.2-3 China's export volume of insecticide technical, 2011-2015



Note: CAGR '11-'15 of volume: -5.11%;

YoY growth rate in 2015: -11.11%.

Source: China Customs and ICAMA

Table 1.3-1 China's exports of major insecticides (including technical and formulations), 2015

No.	Insecticide	Export volume, '000 tonne	YoY Growth rate	Share	Export value, million USD	YoY Growth rate	Share
1	Imidacloprid	xxx	xx%	xx%	xxx	xx%	xx%
2	Chlorpyrifos	xxx	xx%	xx%	xxx	xx%	xx%
3	Abamectin	xxx	xx%	xx%	xxx	xx%	1.40%

Source: ICAMA

Figure 1.3.1-1 China's export volume of imidacloprid technical and formulations, 2011-2015



Note: Other fomulations include 200g/L SC, 240g/L SC, 250g/L SL, 480g/L SC, 50% WP, 5% EC, 600g/L FS, 600g/L SC, 70% WP and 70% WS.

Source: China Customs and CCM

Figure 1.4-3 China's average import price of pesticide and insecticide formulations, 2011-2015



Note: CAGR'11-'15 of pesticide formulations: 3.67%;

CAGR'11-'15 of insecticide formulations: -2.17%;

YoY Growth rate of pesticide formulations in 2015: 4.33%;

YoY Growth rate of insecticide formulations in 2015: -4.61%

Source: China Customs

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