

Production and Market of Azoxystrobin in China

The Fifth Edition

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1. Introduction

Azoxystrobin is an important strobilurin fungicide in China. This report provides an overview of the azoxystrobin industry in China in the aspects of production, product price, exports and consumption, in an aim of unfolding the details of the downtrends and dig out the factors behind the market trends. A five-year forecast on supply and demand of the product is also given to help readers to gain insights into the foreseeable outlook of the industry.

2. Approach for this report

Methodology

This report is drafted by diverse methods as follows:

Desk research

Sources of desk research are various including published magazines, journals, government statistics, industrial statistics, customs statistics, associated seminars as well as information from the Internet. A lot of work has been done to compile and analyze the information obtained. When necessary, checks were made with Chinese market players regarding the market information such as production, demand, consumption and competition.

Telephone interview

The interviewees cover:

- Azoxystrobin manufacturers
- Traders
- Local governments
- Researchers
- Farmers
- Industrial associations

CCM carried out extensive telephone interviews with almost all azoxystrobin technical manufacturers. From those active manufacturers, potential manufacturers and even manufacturers who have stopped production, CCM sourced and verified detailed production and market situation as well as players' comments on azoxystrobin.

In a bid to understand the formulation application situation of azoxystrobin in China, CCM also made contact with domestic traders, sellers and farmers as well. To directly analyze the import and export situation of azoxystrobin technical and formulations, many importers and exporters were contacted whenever the verification was needed.

Raw material and intermediate suppliers are also contacted to get the price, supply information as well as government policies on raw materials and their impact on azoxystrobin.

Data processing and presentation

The data collected and compiled are sourced from:

- Published articles from Chinese periodicals, magazines, journals and third-party databases
- Government statistics & customs statistics
- Telephone interviews with Chinese manufacturers, traders, governments and farmers
- Professional databases from other sources
- Information from the Internet

The data from various channels have been combined to make this report as precise and scientific as possible. Throughout the process, a series of internal discussions have been held in order to analyze the data and draw conclusions.

3. Executive summary

Azoxystrobin is a strobilurin fungicide. After years' development, China's azoxystrobin market has become increasingly intense. More registrations have appeared and more azoxystrobin producers come out accordingly. In 2015, there were XXX active producers in China and the capacity and output of azoxystrobin were XXX t/a and XXX tonnes respectively. The compound annual growth rate (CAGR) of China's azoxystrobin output in 2015 was more than XXX compared with that in 2011.

From 2013 to 2015, with ample azoxystrobin supply and lower production cost caused by a drop in the price of raw materials, the annual ex-works price of azoxystrobin in China witnessed decrease. In 2015, the annual ex-works price of azoxystrobin 95% technical, 25% SC and 50% WDG decreased to about USDXXX/t, USDXXX/t and USDXXX/t respectively.

During 2013-2015, the total export volume of azoxystrobin (calculated by 95% technical) in China grew year by year, reaching about XXX tonnes in 2013, XXX tonnes in 2014 and XXX tonnes in 2015. Currently, most of azoxystrobin in China is exported to Paraguay, Uruguay, India, etc.

In 2015, only quite a small amount is for domestic use and the apparent consumption of azoxystrobin (calculated by 95% technical) was about XXX tonnes. For downstream application, azoxystrobin is mainly applied in fruits and vegetables. About XXX of the total consumption volume of azoxystrobin in China was for fruits. And the share of vegetables in China's total consumption took up about XXX.

Thanks to increasing demand for azoxystrobin at home and abroad, it's predicted that more and more azoxystrobin will be produced in China in the following five years (2016-2020). It is forecasted that during 2016-2020, China's total output of azoxystrobin (calculated by 95% technical) will keep increasing with a CAGR of XXX and the total export volume of azoxystrobin (calculated by 95% technical) will continuously increase in the next few years, with a CAGR of XXX. Domestic demand for azoxystrobin (calculated by 95% technical) is

expected to keep increasing with a CAGR of XXX. And the ex-works price of azoxystrobin 96% technical will see a slight increase in 2017-2020.

4. What's in this report?

Note: Key data/information in this sample page is hidden, while in the report it is not.

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1.1 Supply of azoxystrobin

1.1.3 Capacity and output of azoxystrobin technical, 2011-2015

Thanks to the stimulation of overseas demand and active investment by domestic enterprises, the capacity and output of azoxystrobin have continued to grow in recent years. In 2015, the capacity and output of azoxystrobin technical were XXX t/a and XXX tonnes, witnessing growths of XXX and XXX year on year respectively. From 2011 to 2015, the compound annual growth rate of capacity and output of azoxystrobin technical were XXX and XXX respectively.

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Figure 1.1.3-1 Capacity and output of azoxystrobin technical in China, 2011-2015



Source: CCM

Figure 1.1.3-2 Output of azoxystrobin technical in China by region/province, 2015



Source: CCM

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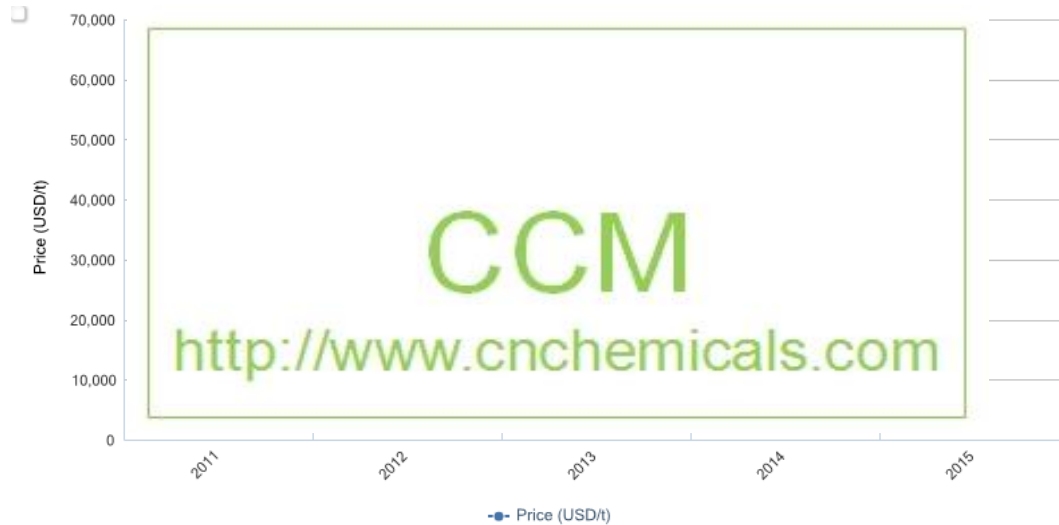
1.2.1 Price

From 2011 to 2015, the annual ex-works price of azoxystrobin technical decreased, with a CAGR of XXX. And the annual ex-works price of azoxystrobin formulations also showed a XXX trend: for the price of azoxystrobin 25% SC and azoxystrobin 50% WDG, their CAGRs were XXX and XXX respectively.

The annual ex-works price of azoxystrobin 95% technical reached USD XXX in 2008, hitting a record high and increasing by XXX compared with that of USD XXX in 2007. It was mainly because of a rise in the price of raw materials and increasing demand from domestic and oversea market.

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Figure 1.2.1-1 Annual ex-works price of azoxystrobin technical in China, 2011-2015



Note: The data in 2011-2013 were for azoxystrobin 95% technical and in 2014-2015 were for azoxystrobin 96% technical.

Source: CCM

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1.2.2 Export of azoxystrobin, 2011-2015

Before 2012, China mainly exported azoxystrobin 95% technical, azoxystrobin 25% SC and azoxystrobin 50% WDG. After 2012, the varieties of azoxystrobin for export increased, including azoxystrobin technical (such as azoxystrobin 95% technical, azoxystrobin 96% technical, azoxystrobin 97% technical and azoxystrobin 98% technical), and azoxystrobin formulations (such as azoxystrobin 25% SC, azoxystrobin 50% WDG and azoxystrobin 70% WDG).

From 2011 to 2015, the export volume (commodity volume, the same below) of azoxystrobin 95% technical accounted for XXX in 2011, XXX in 2012, XXX in 2013, XXX in 2014 and XXX in 2015 of the total. In 2015, the export volume of azoxystrobin 98% technical firstly exceeded that of azoxystrobin 95% technical, becoming No.1 among all azoxystrobin technical specifications by accounting for XXX of the total technical export volume. During this period (2011-2015), azoxystrobin 25% SC has been the predominant export variety of azoxystrobin formulations, with annual export volume accounting for XXX of the total export volume of azoxystrobin formulations.

Table 1.2.2-1 China's exports of azoxystrobin by month, 2015

No.	Month	Azoxystrobin 95% technical		Azoxystrobin 96% technical		Azoxystrobin 97% technical		...	Total (calculated by 95% technical)
		Volume (tonne)	Price (USD/kg)	Volume (tonne)	Price (USD/kg)	Volume (tonne)	Price (USD/kg)		
1	Jan.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	Feb.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	March	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	April	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
5	May	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
6	June	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
7	July	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
8	Aug.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
9	Sept.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
10	Oct.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
11	Nov.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
12	Dec.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total		XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Note: Total price in the table refers to average price.

Source: China Customs & CCM

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4.2 Future forecast on azoxystrobin, 2016-2020

It is forecasted that China's total output of azoxystrobin (calculated by 95% technical) will XXX during 2016-2020 XXX by XXX demand from both domestic and overseas markets, which is mainly attributed to the expansion of cash crop planting area and its high effectiveness. Domestic demand for azoxystrobin (calculated by 95% technical) is expected to XXX with a CAGR of XXX during 2016-2020.

Furthermore, it is forecasted that China's total export volume of azoxystrobin (calculated by 95% technical) will XXX in the next few years, with a CAGR of XXX during 2016-2020, based on the advantages of advanced quality of products and continuously rising demand for azoxystrobin technical and formulations in overseas market.

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