

Survey of Metolachlor in China

The Fourth Edition

September 2017

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Kcomber Inc.

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1. Introduction

This report presents an overview of China's supply and demand of metolachlor which is a selective herbicide, as well as forecast on the future trends.

Metolachlor is featured by broad weeding spectrum, high effectiveness and wide applications. From 2014 to 2016, the compound annual growth rate of metolachlor technical's capacity in China was stable. And the output of China's metolachlor technical sharply increased in 2016. Metolachlor industry in China was developing at a fast pace in 2016 and H1 2017. However, it is noteworthy that in general, the actual consumption volume of metolachlor formulations (calculated by 97% technical) showed a downward trend from 2014 to 2016.

What's the detailed development situation of the industry behind these statistics? How will the industry go in the future years? This report will illustrate the details for readers through the following aspects:

- Product registration under the Institute for Control of Agrochemicals, Ministry of Agriculture, as of 31 Aug., 2017
- Production situation (capacity, output and key producers), 2014–H1 2017
- Prices of technical and formulations of metolachlor, 2014–H1 2017
- Export analysis, 2014–H1 2017
- Domestic consumption, 2014–2016
- Forecast on output and demand, 2017–2021

2. Approach for this report

Survey of Metolachlor in China is CCM's fourth edition report on Chinese metolachlor industry, finished in September 2017.

Methodology and source

● Methodology

This report is drafted by diverse methods as follows:

(1) Desk research

The sources of desk research are various, including published journals, government statistics, industrial statistics, Customs statistics, as well as information from the Internet. Obtained information has been compiled and analysed. When necessary, checks will be made with Chinese metolachlor suppliers regarding market information such as key producers, production and price trend, etc.

(2) Telephone interview

Extensive telephone interviews have been carried out in order to grasp the actual market situation of metolachlor in China.

Interviewees cover:

- Producers
- Traders

(3) Internet

CCM contacted with the players in this industry through B2B websites and software.

● Data processing and presentation

The data collected and compiled were sourced from:

- a. Published articles from periodicals, magazines and journals
- b. Statistics from governments and international institutes
- c. Telephone interviews with domestic suppliers, traders, industrial experts
- d. Third-party data providers
- e. Information from the Internet

Data obtained from various sources have been combined and cross-checked to make this report as precise and scientific as possible. Throughout the process, a series of internal discussions were made in order to analyse the data and have conclusions drawn.

● Abbreviation & full name

Table Abbreviations and full names in this report

Abbreviation	Full name
AI	Active ingredient
CAGR	Compound annual growth rate
EA	Effervescent granule
EC	Emulsifiable concentrate
FG	Fine granule
ICAMA	The Institute for the Control of Agrochemicals, Ministry of Agriculture of the People's Republic of China
OD	Oil dispersion/Oil-based suspension concentrate
SC	Suspension concentrate
SE	Suspension emulsion/Suspo-emulsion
TC	Technical material
WP	Wettable powder
EW	Emulsion, oil in water

● Unit

- Tonne: equals to metric ton in this report
- /t: per tonne
- t/a: tonne/annual, tonne per year
- USD: US dollar, currency unit in the US
- RMB: currency unit in China, also named yuan

Table USD/CNY exchange rates, 2014–Aug. 2017

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
2014	6.1043	6.1128	6.1358	6.1553	6.1636	6.1557	6.1569	6.1606	6.1528	6.1441	6.1432	6.1238	6.1428
2015	6.1272	6.1339	6.1507	6.1302	6.1143	6.1161	6.1167	6.3056	6.3691	6.3486	6.3666	6.4476	6.2288
2016	6.5527	6.5311	6.5064	6.4762	6.5315	6.5874	6.6774	6.6474	6.6715	6.7442	6.8375	6.9182	6.6425
2017	6.8918	6.8713	6.8932	6.8845	6.8827	6.8019	6.7772	6.7148	-	-	-	-	-

Source: The People's Bank of China

3. Executive summary

Metolachlor is a selective herbicide with broad weeding spectrum, high effectiveness and wide application fields. According to statistics from the Institute for the Control of Agrochemicals, Ministry of Agriculture (ICAMA), as of 31 Aug., 2017, a total of XX valid registrations of metolachlor have been licensed in China, including XX for technical, XX for single formulations and 46 for mixed formulations.

The metolachlor industry has a fast expansion in 2016 and H1 2017 in China, while it was relatively stable in 2014 and 2015. The output of metolachlor technical sharply increased to XXX tonnes in 2016 with a growth rate of XXX% year on year.

Metolachlor products made in China are export-oriented. The annual export volumes (calculated by 97% technical) accounted for around XX%–XX% of the national total output during 2014–2016, with a CAGR of XXX%.

But in general, the consumption volume of metolachlor formulations (calculated by 97% technical) showed a downward trend from 2014 to 2016 with a CAGR of XXX%.

In 2017–2021, it is predicted that the output of metolachlor technical (calculated by 97% technical) would XX mainly drove by the XXX demand from overseas markets. It is noteworthy that the domestic demand would be on a slight XXX during the same time.

4. What's in this report?

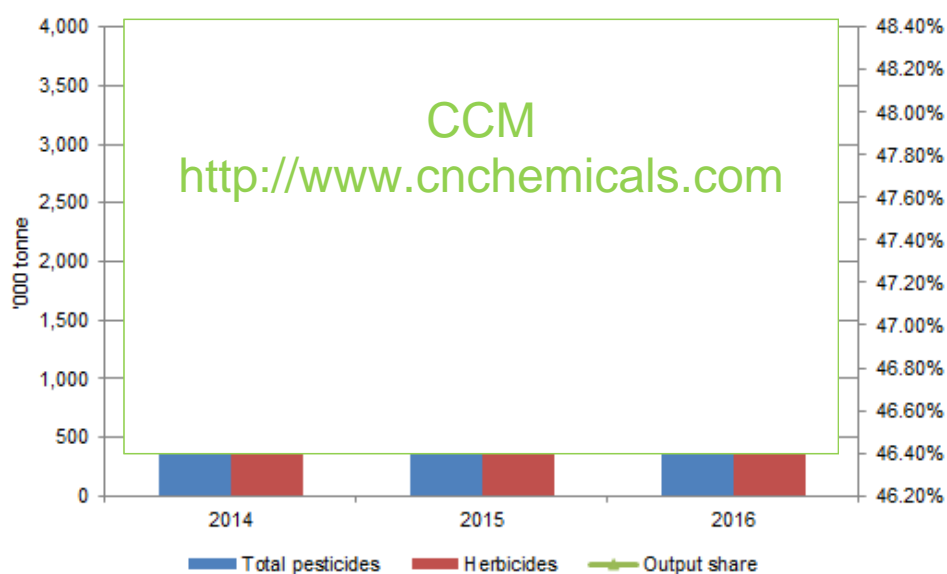
Note: Key data/information in this sample page is hidden, while in the report it is not.

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1 Overview of metolachlor industry in China

1.1 Brief introduction to pesticide industry in China

Figure 1.1-1 Output volume and output share of herbicides in pesticides in China, 2014–2016



Note: The data above are calculated by 100% AI.
Source: The National Bureau of Statistics of China & CCM

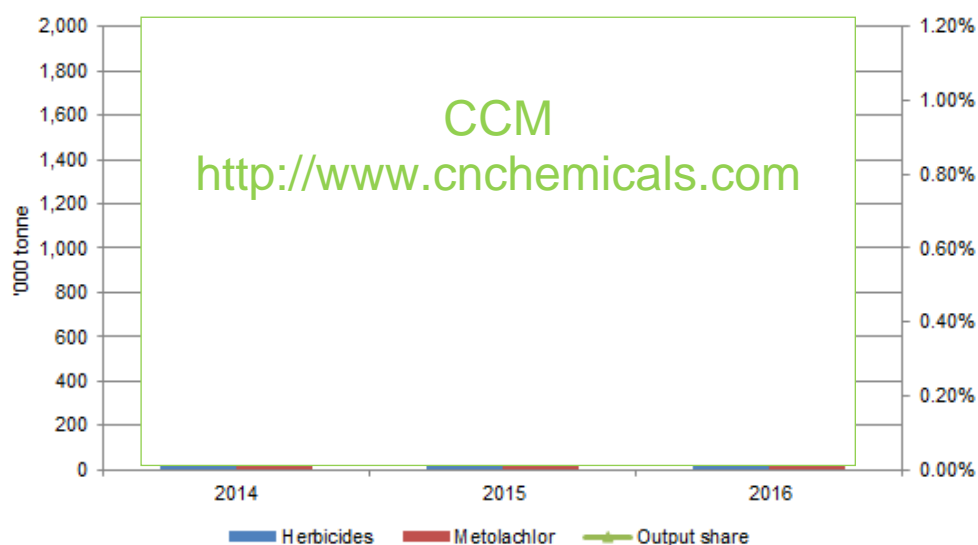
Table 1.1-1 China's imports and exports of pesticides and herbicides, 2014–2016

Year	Pesticides				Herbicides				Share of herbicides/pesticides			
	Import		Export		Import		Export		Import		Export	
	Volume, tonne	Value, million USD	Volume, tonne	Value, million USD	Volume, tonne	Value, million USD	Volume, tonne	Value, million USD	Volume	Value	Volume	Value
2014	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2015	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2016	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: China Customs & CCM

1.2 Position of metolachlor in China's herbicide industry

Figure 1.2-1 Output share of metolachlor in herbicide industry in China, 2014–2016



Note: The data above are calculated by 100% AI.

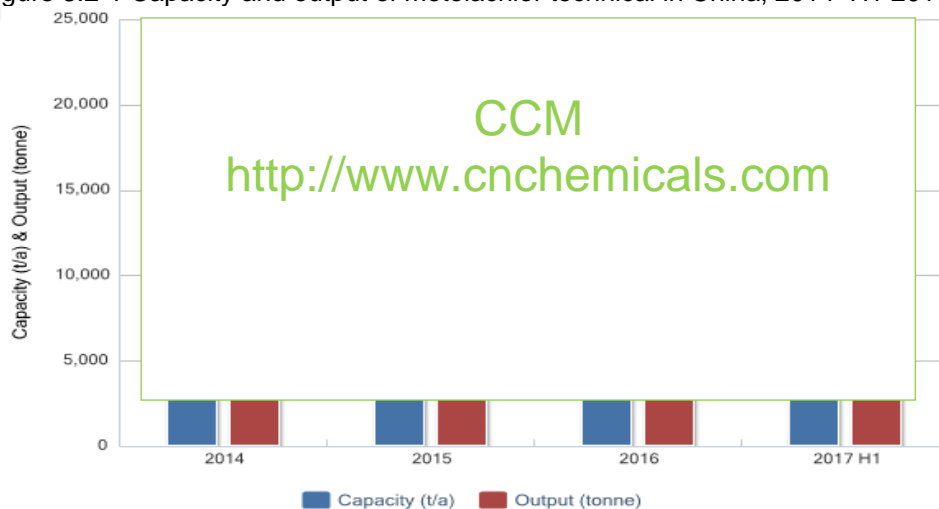
Source: The National Bureau of Statistics of China & CCM

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3 Supply

3.2 Production of metolachlor in China, 2014–H1 2017

Figure 3.2-1 Capacity and output of metolachlor technical in China, 2014–H1 2017



Note: Calculated by 97% technical and based on capacities and outputs of the four active producers

Source: CCM

Table 3.2-1 Capacity and output of major metolachlor technical producers in China, 2014–H1 2017

No.	Producer	Location	Status in Aug. 2017	H1 2017		2016		2015		2014	
				Capacity (t/a)	Output (tonne)	Capacity (t/a)	Output (tonne)	Capacity (t/a)	Output (tonne)	Capacity (t/a)	Output (tonne)
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Others				XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total				XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Note: Calculated by 97% technical

Source: CCM

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4 Circulation

4.1 Prices of metolachlor technical, 2014–H1 2017

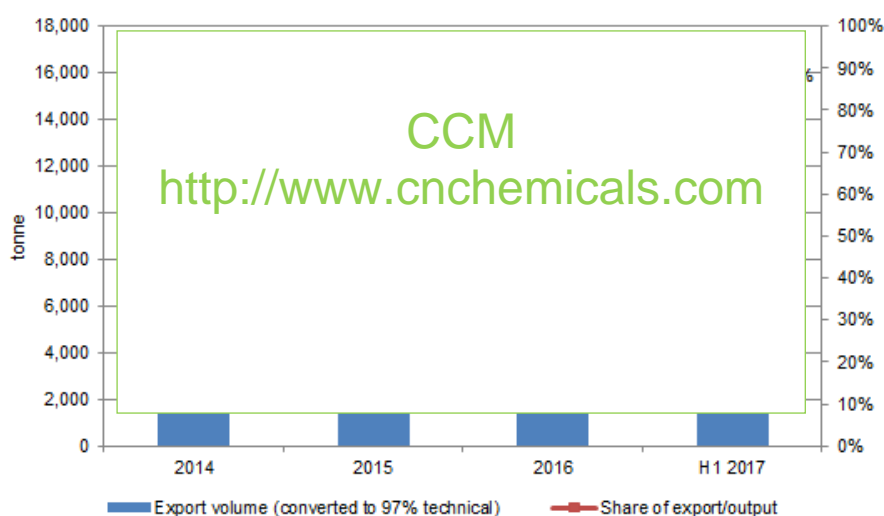
Figure 4.1-2 Monthly ex-works price of 97% metolachlor technical in China, Jan. 2014–June 2017



Source: CCM

4.2 Exports of metolachlor, 2014–H1 2017

Figure 4.2-1 Export volume of metolachlor in China, 2014-H1 2017



Source: China Customs & CCM

- By month

Table 4.2-1 China's exports of metolachlor by month, H1 2017

Month	720g/L EC		960g/L EC		96% Technical		97% Technical	
	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg	Quantity, tonne	Price, USD/kg
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: China Customs & CCM

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- By destination

Table 4.2-5 China's export volume of metolachlor by destination, H1 2017, tonne

No.	Destination	720g/L EC	960g/L EC	96% Technical	97% Technical	Total
1	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX	XXX	XXX
7	XXX	XXX	XXX	XXX	XXX	XXX
8	XXX	XXX	XXX	XXX	XXX	XXX
9	XXX	XXX	XXX	XXX	XXX	XXX
10	XXX	XXX	XXX	XXX	XXX	XXX
11	XXX	XXX	XXX	XXX	XXX	XXX
12	XXX	XXX	XXX	XXX	XXX	XXX
13	XXX	XXX	XXX	XXX	XXX	XXX
14	XXX	XXX	XXX	XXX	XXX	XXX
15	XXX	XXX	XXX	XXX	XXX	XXX
16	XXX	XXX	XXX	XXX	XXX	XXX
17	XXX	XXX	XXX	XXX	XXX	XXX
18	XXX	XXX	XXX	XXX	XXX	XXX
19	XXX	XXX	XXX	XXX	XXX	XXX
20	XXX	XXX	XXX	XXX	XXX	XXX
	Others	XXX	XXX	XXX	XXX	XXX
	Total	XXX	XXX	XXX	XXX	XXX

Source: China Customs & CCM

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- By exporter

Table 4.2-9 China's export volume of metolachlor by exporter, H1 2017, tonne

No.	Exporter	720g/L EC	960g/L EC	96% Technical	97% Technical	Total
1	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX	XXX	XXX
7	XXX	XXX	XXX	XXX	XXX	XXX

No.	Exporter	720g/L EC	960g/L EC	96% Technical	97% Technical	Total
8	XXX	XXX	XXX	XXX	XXX	XXX
9	XXX	XXX	XXX	XXX	XXX	XXX
10	XXX	XXX	XXX	XXX	XXX	XXX
11	XXX	XXX	XXX	XXX	XXX	XXX
12	XXX	XXX	XXX	XXX	XXX	XXX
13	XXX	XXX	XXX	XXX	XXX	XXX
14	XXX	XXX	XXX	XXX	XXX	XXX
15	XXX	XXX	XXX	XXX	XXX	XXX
16	XXX	XXX	XXX	XXX	XXX	XXX
17	XXX	XXX	XXX	XXX	XXX	XXX
18	XXX	XXX	XXX	XXX	XXX	XXX
19	XXX	XXX	XXX	XXX	XXX	XXX
20	XXX	XXX	XXX	XXX	XXX	XXX
Others		XXX	XXX	XXX	XXX	XXX
Total		XXX	XXX	XXX	XXX	XXX

Source: China Customs & CCM

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5 Consumption, 2014–2016

Table 5-1 Actual consumption volume of metolachlor formulations in China, 2014–2016, tonne

Year	720g/L EC	960g/L EC	Others	Total
2014	XXX	XXX	XXX	XXX
2015	XXX	XXX	XXX	XXX
2016	XXX	XXX	XXX	XXX

Note: Calculated by 97% technical

Source: CCM

Figure 5-1 Actual consumption volume of metolachlor formulations in China by crop, 2014–2016



Note: Calculated by 97% technical

Source: CCM

Figure 5-2 Share of actual consumption volume of metolachlor formulations in China by crop, 2016



Note: Calculated by 97% technical
Source: CCM

6 Forecast on output and demand, 2017–2021

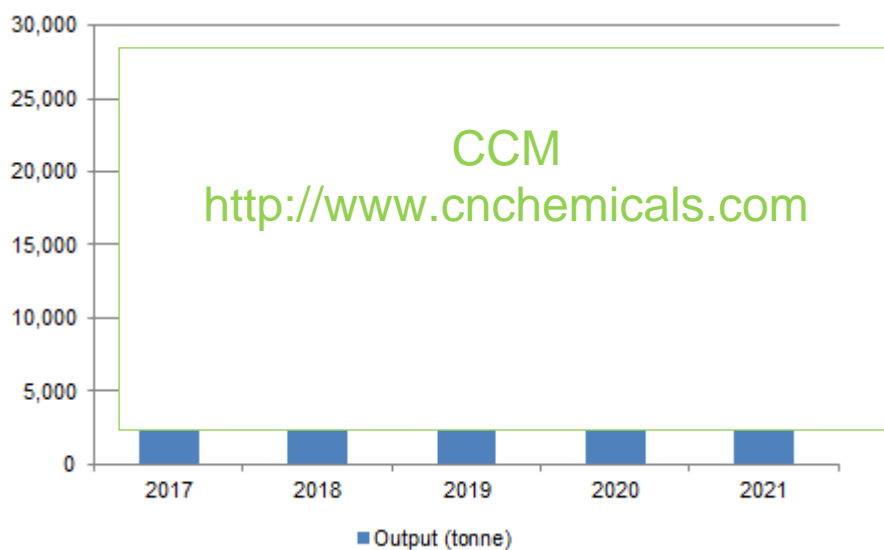
Table 6-1 Drivers and barriers for development of metolachlor industry in China

Item	Factor	Influence
Driver	XXX	XXX
	XXX	XXX
Barrier	XXX	XXX
	XXX	XXX
	XXX	XXX
	XXX	XXX

Source: CCM

Output

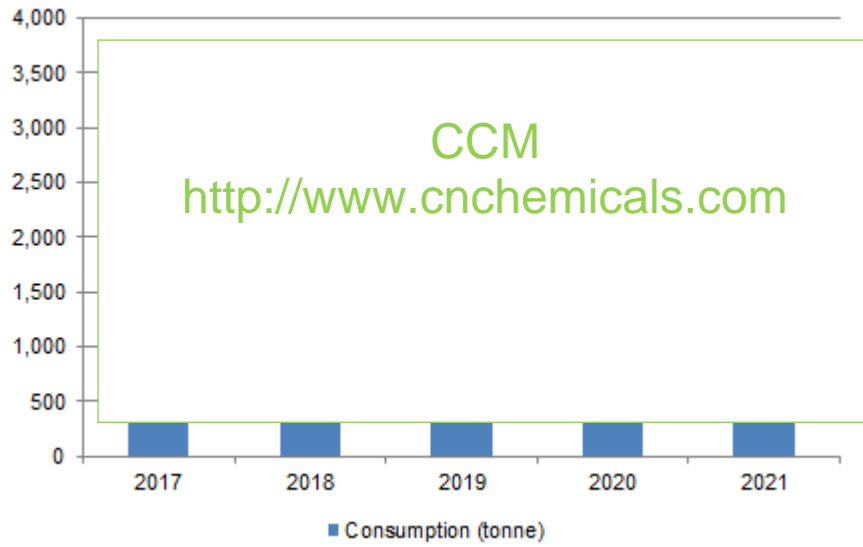
Figure 6-1 Forecast on output of metolachlor technical in China, 2017–2021



Source: CCM

Demand

Figure 6-2 Forecast on demand for metolachlor formulations in China, 2017–2021



Note: Calculated by 97% technical
Source: CCM

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If you want more information, please feel free to contact us

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