

Pyrethroids Survey in China

The Third Edition
June 2020

Researched & Prepared by:

Kcomber Inc.

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1. Introduction

Pyrethroids, have witnessed a stable development in the past few years in China, and they have been playing an increasingly important role in the pest control on various crops in China. In 2017, the total technical output of pyrethroid insecticides (calculated by technical) has reached a record high. However, it fell in 2019, affected by the increasingly stricter environmental protection policies. Since both the output and domestic demand of pyrethroid insecticides will continue to see growth in the next five years. It is certain that the pyrethroid insecticide industry will drive healthy and fast development of the whole insecticide industry and promote the upgrading of insecticide products in China.

This is CCM's third edition report of China's pyrethroids industry, finished in June 2020. Importance is attached to the following parts:

- Investigate all the data related to pyrethroids technical in China in the past years, including registration, supply, demand, export, price, etc.
- Introduce the major pyrethroids from the aspects of capacity, output, consumption and key producers.
- Identify the leading players of pyrethroids industry in China.
- Emphasize on consumption volume of pyrethroids in 2015-2019, as well as the consumption structure by application areas.
- Figure out the development status and influencing factors including drivers and barriers.
- Forecast on pyrethroids from supply to demand in the next five years.

2. Approach for this report

This report is mainly based on telephone interviews with key producers, researchers, distributors, governmental officials, farmers, etc. Desk research and third-party data have also been included.

Desk research

Sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, associated seminars as well as information from the internet. A lot of work has been done to compile and analyse the information obtained.

Telephone Interview

CCM has contacted approximately 50 companies to obtain relevant data for this research. Interviewees include pyrethroids producers, distributors, experts in the industry as well as farmers. Information derived from the government and industry trade sources, trade publications, etc. is also applied in this report.

Data processing and presentation

The data collected from various channels have been cross-checked to make this report as precise and scientific as possible. Throughout the process, a series of internal discussions have been held in order to analyse the data and draw conclusions from them.

3. Executive summary

Pyrethroids, a category of broad-spectrum, high-efficiency and low-toxicity insecticide, have witnessed a stable development in the past few years in China, and they have been playing an increasingly important role in the pest control on various crops in China.

Production

With the capacity expansion and many new production lines launched in recent years, as well as some capacity withdrawal, China's total capacity of pyrethroids technical was around XXX t/a in 20XX, and the output was about XXX tonnes.

In 20XX, the output of lambda-cyhalothrin technical reached XXX tones, accounting for about XXX% of the total. Bifenthrin, another major kind of pyrethroid, with its technical output of XXX tonnes in 20XX, accounted for about XXX% of the nation's total.

Consumption

On the whole, domestic market of pyrethroids has been expanding in recent years, with consumption volume increasing steadily. China's total consumption volume of pyrethroids (by technical) reached around XXX tonnes in 20XX, with a CAGR growth rate of XXX% during 20XX–20XX.

Most of the pyrethroids have witnessed growth in consumption in the past several years in China. In domestic market, lambda-cyhalothrin became the most popular pyrethroid in 20XX, followed by bifenthrin and fenvalerate.

The importance of pyrethroids lies not only in modern agriculture, but also in non-agricultural uses such as home and garden pest control, veterinary pharmaceuticals, animal health, timber protection and human health medications.

Owing to drug resistance and depressed market demand, pyrethroids' application in agriculture has not seen fast development. With more and more attentions paid to living conditions and health, pyrethroids will enjoy a bright prospect in non-crop use in the future.

Forecast

The total output of pyrethroid technical will continue to increase in the following five years, hitting around XXX tonnes in 20XX, with a XXX% CAGR during 20XX–20XX. The total demand for pyrethroids (calculated by technical) will hit around XXX tonnes in 20XX, with a XXX% CAGR in the same period.

Synthetic pyrethroids are still playing a major role in modern pest control. Pyrethroids will continue to offer substantial benefits to the modern agriculture, especially in major emerging markets where the demand for low-cost solutions will remain strong. Mixed with new compounds, pyrethroids are well suited for future pest control.

The increasing market potential of pyrethroids will be mainly driven by two factors: first, the application rates of most pyrethroids in agriculture fields (mainly fruits, vegetables and melons, etc.) and non-crop use are both expected to see an continuous increase, with more attention paid by formulations companies; second, control range of some new and potential products will be greatly promoted in the non-crop pesticide market in the future.

4. What's in this report?

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1 Overview of pyrethroids industry in China

Pyrethroids now constitute a major proportion of the world's synthetic agricultural insecticide market and are also found in many commercial products used for insect control, including household insecticides, pest sprays, etc.

1.3 Position of pyrethroids in Chinese insecticide industry

...

In 20XX, the total technical output of pyrethroid insecticides (calculated by technical) has reached over XXX tonnes in China, hitting the record high. However, it fell to less than XXX tonnes in 20XX, affected by the increasingly stricter environmental protection policies.

Meanwhile, the domestic consumption of pyrethroid insecticides (calculated by technical) has grown at a CAGR of XXX% during 20XX–20XX, reaching around XXX tonnes in 20XX.

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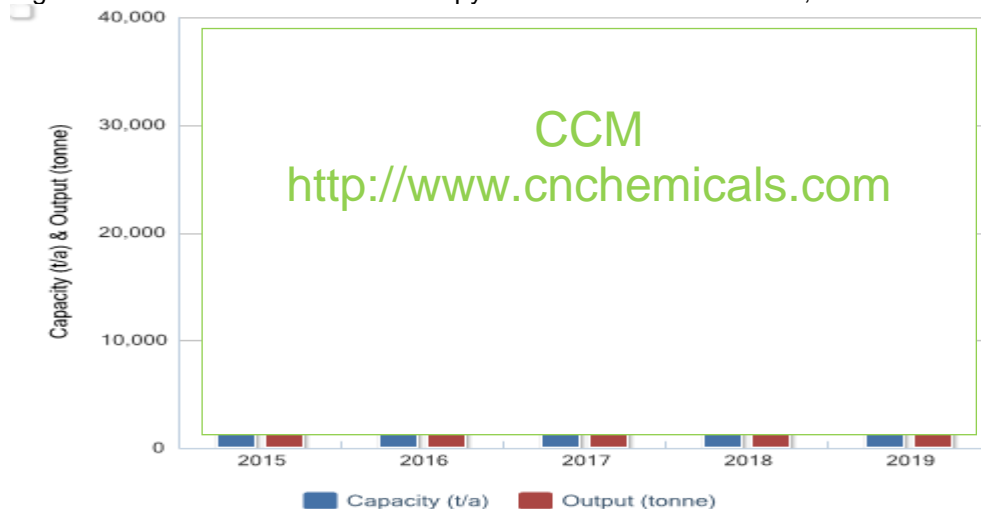
2 Supply and demand of pyrethroids in China

2.1 Summary of supply and demand

2.1.1 Supply summary (capacity & output, key producers), 2015–2019

In China, more than XXX pyrethroids have been produced and promoted as of May 20XX. With the capacity expansion and many new production lines launched in recent years, at the same time with some capacity withdrawal, China's total technical capacity of pyrethroids has kept around XXX t/a, while their total technical output was about XXX tonnes in 20XX.

Figure 2.1.1-1 Production situation of pyrethroids technical in China, 20XX–20XX



Source: CCM

Table 2.1.1-1 Production situation of key pyrethroids technical in China, 20XX–20XX

Product	Capacity, t/a					Output, tonne				
	20XX	20XX	20XX	20XX	20XX	20XX	20XX	20XX	20XX	20XX
Bifenthrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Lambda-cyhalothrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cypermethrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fenpropathrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fenvalerate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Permethrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Beta-cypermethrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Esfenvalerate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cyfluthrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Deltamethrin	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Others	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM

...

2.2 Supply and demand of key products

2.2.1 Lambda-cyhalothrin

...

Table 2.2.1.1-1 Valid registrations of lambda-cyhalothrin in China, as of April 20XX

Effective year	Technical	Formulations		Total
		Single formulations	Mixed formulations	
Before 20XX	XXX	XXX	XXX	XXX
20XX	XXX	XXX	XXX	XXX
20XX	XXX	XXX	XXX	XXX
20XX	XXX	XXX	XXX	XXX
20XX	XXX	XXX	XXX	XXX
20XX	XXX	XXX	XXX	XXX
Jan.–April 20XX	XXX	XXX	XXX	XXX
Total	XXX	XXX	XXX	XXX

Source: ICAMA

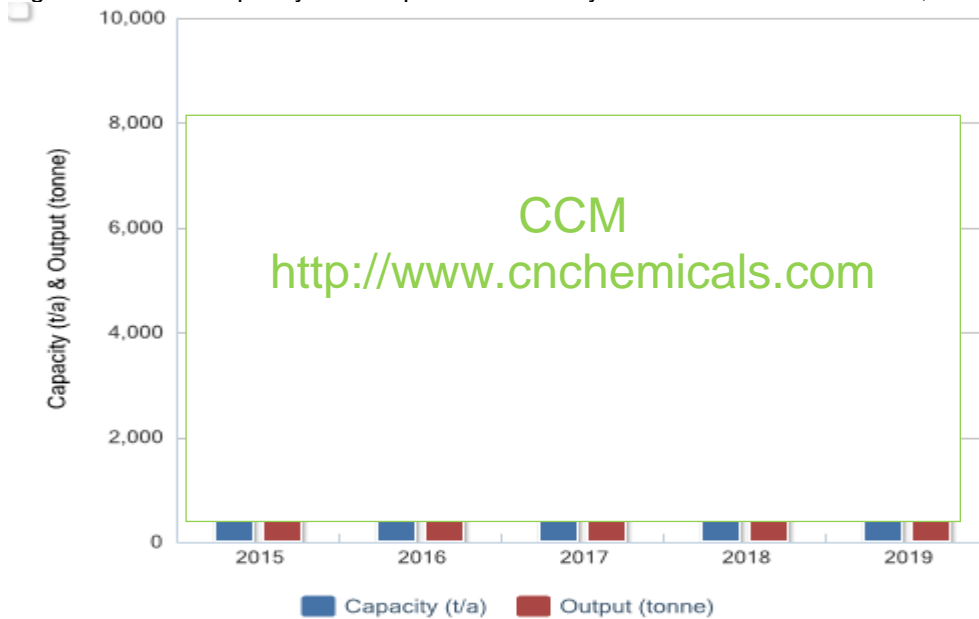
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2.2.1.2 Production situation, 20XX–20XX

Production of lambda-cyhalothrin technical has seen fluctuation in China during 20XX–20XX, which is mainly attributed to the obvious changes in overseas orders and China's environmental protection policies. Especially in 20XX and 20XX, drops in output of lambda-cyhalothrin technical were the result of environmental protection measures.

...

Figure 2.2.1.2-1 Capacity and output of lambda-cyhalothrin technical in China, 20XX–20XX



Source: CCM

Figure 2.2.1.2-2 Geographic distribution of capacity of lambda-cyhalothrin technical in China, 2019



Source: CCM

...

Table 2.2.1.2-2 Capacity and output of main lambda-cyhalothrin technical producers in China, 20XX–20XX

No.	Enterprise	20XX		20XX		20XX		20XX		20XX	
		Capacity, t/a	Output, tonne	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
5	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM

2.2.1.3 Export situation, 20XX–20XX

...

Export volume of lambda-cyhalothrin hit about XXX tonnes in 20XX, but fell to XXX tonnes in 20XX, down by XXX%. However, China's total lambda-cyhalothrin export value reached USDXXX million in 20XX, up XXX% from the year 20XX.

...

Table 2.2.1.3-1 Export of lambda-cyhalothrin by month, 20XX

Month	10% WP		25g/L EC		...		95% Tech.		96% Tech.		Total volume (kg)
	Volume (kg)	Unit price (USD/kg)	Volume (kg)	Unit price (USD/kg)	Volume (kg)	Unit price (USD/kg)	Volume (kg)	Unit price (USD/kg)	Volume (kg)	Unit price (USD/kg)	
Jan.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Feb.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Dec.	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM & China Customs

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Table 2.2.1.3-4 Export of lambda-cyhalothrin by destination, 2019

No.	Country	10% WP (kg)	25g/L EC (kg)	...	95% Tech. (kg)	96% Tech. (kg)	Total volume (kg)	Total value (USD)
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
...	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
20	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Others		XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total		XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCM & China Customs

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