

Survey of Acetochlor in China

The Sixth Edition

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1. Introduction

Though it is faced with lots of competitors and substitutes in herbicide application nowadays, acetochlor still accounts for a large market share among selective herbicides applied in China. It can be used for pre-emergent control of annual weeds and some broadleaf weeds in the fields of corn, cotton, peanut, soybean, etc. There are two peak seasons for acetochlor consumption in China—April to July and Sept. to Oct. every year. The consumption is much larger in the first peak season, since most applied crops are planted in the first half of a year.

In recent years, the total capacity of acetochlor technical in China has shown much larger than the total output. From 2016 to 2019, China saw increase in its acetochlor technical capacity, but the output had continuous decreases.

How will this industry go in the coming years? This report presents an overview of production, consumption and price of acetochlor in China, as well as a forecast on the product's future trend. You definitely will get some refreshing information on the acetochlor industry from the report.

This report will illustrate the details for readers through the following aspects:

- Product registration, as of 10 Jan., 2020
- Production situation (technology, capacity, output and key producers), 2015–2019
- Prices of acetochlor technical, 2014–Feb. 2020
- Export analysis, 2016–2018
- Domestic consumption, 2015–2019
- Forecast on output and demand to 2023

2. Approach for this report

This report is drafted by diverse methods as follows:

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. Information obtained has been compiled and analysed. When necessary, checks will be made with players in China's acetochlor industry regarding market information such as key producers, production situation, trend of product price.

Telephone interview

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

Interviewees cover:

- Producers
- Traders

Internet search

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

Data processing and presentation

The data collected and compiled were sourced from:

- Published articles from periodicals, magazines and journals
- Statistics from local governments and international institutes
- Telephone interviews with domestic suppliers, traders, industrial experts
- Third-party data providers
- 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.

3. Executive summary

Acetochlor accounts for a large market share among selective herbicides applied in China. Currently, it can be used for pre-emergent control of annual weeds and some broadleaf weeds in the fields of corn, cotton, peanut, soybean, etc.

According to the Institute for the Control of Agrochemicals, Ministry of Agriculture of the People's Republic of China (ICAMA), as of 10 Jan., 2020, there were XXX registrations of acetochlor in China, specifically, XXX for acetochlor technical, XXX for single formulations, and XXX for mixed formulations.

- Production

The total capacity of acetochlor technical in China is now much larger than the total output. As of 2019, the total capacity of acetochlor technical was XXX t/a, while the output was about XXX tonnes. During 2016–2018, the total capacity of acetochlor technical in China was on a continuous rise. Yet the output dropped from XXX tonnes in 2016 to XXX tonnes in 2019, with a CAGR of XXX%.

- Export

The total export volume of China's acetochlor witnessed a decline in 2016–2018, at a CAGR of XXX%. Furthermore, in 2018, the export volume of acetochlor decreased to XXX tonnes, down XXX year on year. Ukraine, Thailand, Israel, South Africa and Pakistan were the top five destinations of acetochlor exported from China in 2018.

- Consumption

In China, the actual consumption of acetochlor formulations (calculated by 92% technical) stayed at above XXX tonnes in 2015–2017. In 2018, the consumption volume decreased to about XXX tonnes. There are two reasons for the decrease. On one hand, the unit consumption of acetochlor has been on the decline with the Chinese government encouraging decreasing unit consumption of pesticides. On the other hand, acetochlor does harm to human's health and it is faced with competition from its substitutes, such as S-metolachlor.

Domestic acetochlor industry experienced oversupply in China in 2015–2019. Nevertheless, the market demand for acetochlor technical is rigid currently. It's predicted that it's unlikely to see too much decrease in supply and demand of acetochlor technical in the next five years. Thus, it's estimated that the supply and demand of acetochlor technical in China will grow at growth rate of XXX and XXX respectively during 2020–2023.

4. What's in this report?

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

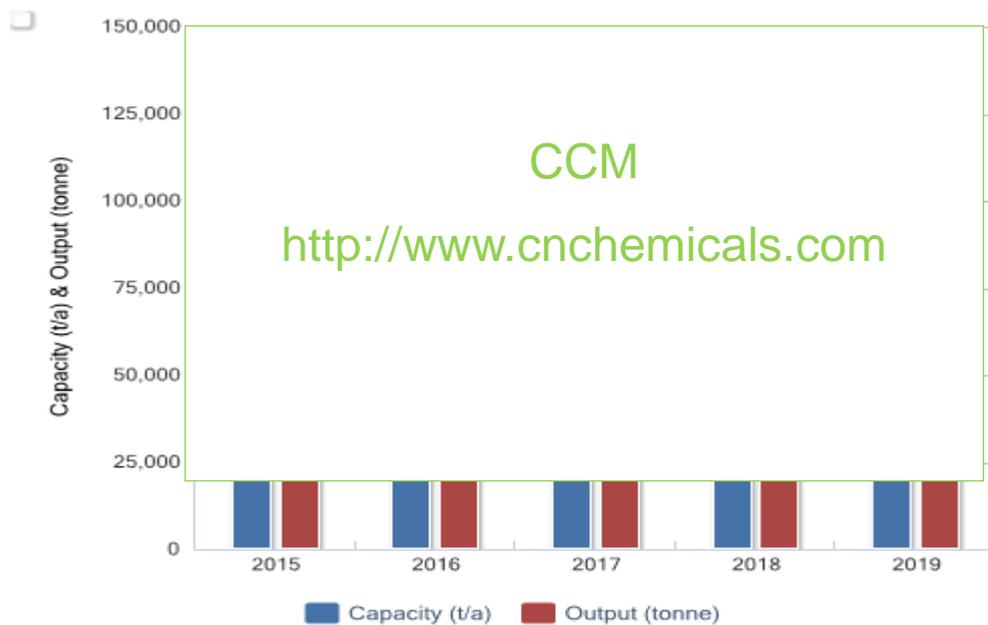
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2.3 Production, 2015–2019

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Though acetochlor technical has seen overcapacity in China these years, Nantong Jiangshan Agrochemical & Chemicals Co., Ltd. still expanded its acetochlor technical capacity from XXX t/a to XXX t/a in Sept., 2018.

Figure 2.3-1 Capacity and output of acetochlor technical (calculated by 92% technical) in China, 2015–2019



Source: CCM

Table 2.3-1 Capacity and output of key acetochlor technical producers in China, 2017–2019

No.	Producer	Production status, 2019	Capacity, t/a			Output, tonne		
			2019	2018	2017	2019	2018	2017
1	Nantong Jiangshan Agrochemical & Chemicals Co., Ltd.	Active	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

Source: CCM

...

3 Circulation

3.1 Price, 2014–Feb. 2020

The annual ex-works price of acetochlor technical in China was USDXXX/t in 2019, a large drop from USDXXX/t in 2018. In Feb. 2020, the monthly ex-works price in China was USDXXX/t. Though the monthly price in China has seen small recovery since Oct. 2019 and been driven up by decreasing supply under COVID-19 outbreak, the price was still at low level compared with that in 2018 and even in H1 2019. Oversupply of acetochlor technical in China is responsible for the decrease.

In 2017, the annual average ex-works price of 92% acetochlor technical in China...

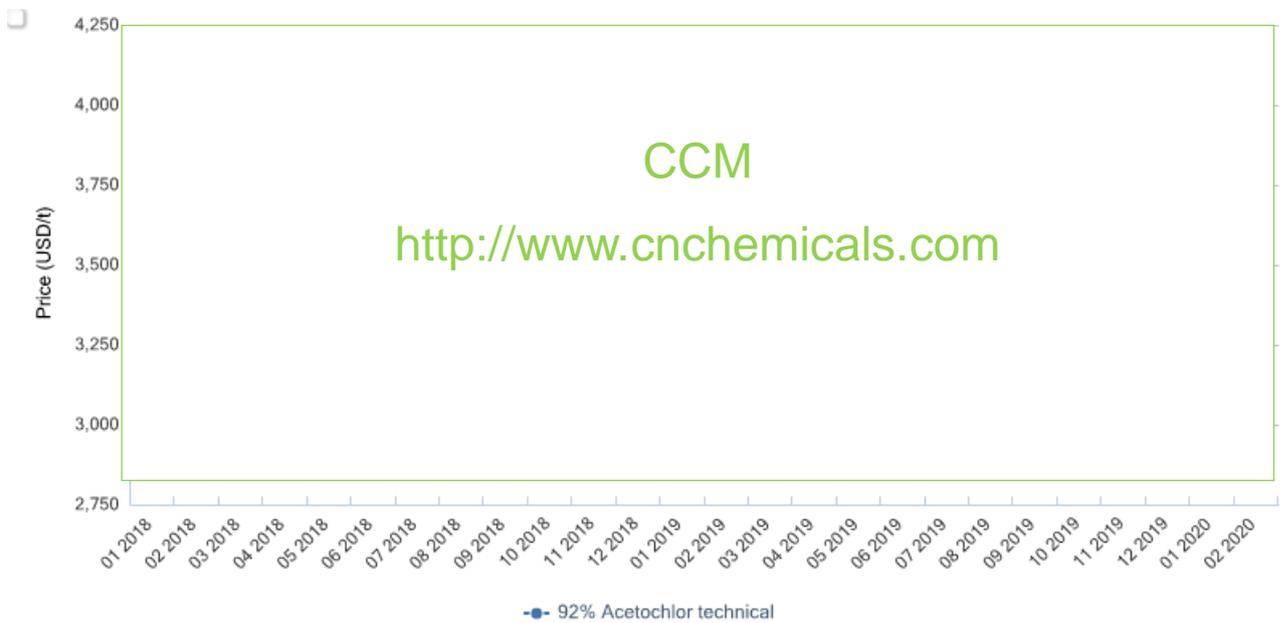
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Figure 3.1-1 Annual ex-works price of 92% acetochlor technical in China, 2014–2019



Source: CCM

Figure 3.1-2 Monthly ex-works price of 92% acetochlor technical in China, Jan. 2018–Feb. 2020



Source: CCM

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4 Consumption, 2015–2019

Acetochlor can be used for pre-emergent control of annual weeds and some broadleaf weeds in the fields of corn, cotton, peanut, soybean, etc.

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Table 4-1 Apparent consumption of acetochlor technical in China, 2015–2019

Year	Output (calculated by 92% technical), tonne	Output (calculated by 100% AI), tonne	Export (calculated by 100% AI), tonne	Apparent consumption (calculated by 100% AI), tonne
2015	XXX	XXX	XXX	XXX
2016	XXX	XXX	XXX	XXX
2017	XXX	XXX	XXX	XXX
2018	XXX	XXX	XXX	XXX
2019	XXX	XXX	XXX	XXX

Source: China Customs & CCM

Table 4-2 Actual consumption of acetochlor in China by crop, 2018

Crops	Consumption volume, tonne
Corn	XXX
XXX	XXX
...	...
XXX	XXX

Note: The consumption volume is calculated by 92% technical.

Source: CCM

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

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