

Top 100 Pesticide Enterprises in China

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Researched & Prepared by:

Kcomber Inc.

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1. Introduction

The pesticide industry witnessed drastic changes in 2019. China's pesticide industry has experienced complex changes from the Sino-US trade war, exchange rate fluctuations and economic downturn. The output of pesticide has increased slightly in 2019, ending the two-year continuous decline. And China's pesticide prices generally followed a downward trend in 2019. China's pesticide industry achieved slight yearly growth in both revenue and profit against the background of increasing downward pressure on the industry, but the growth rate slowed down. As environmental protection measures accelerated the elimination of backward capacity, pesticide supply tightened in 2019.

Learning from the List of 2020 China Top 100 Pesticide Enterprises, the sales growth rate of these companies has slowed down significantly. On the other hand, despite its smaller average sales compared with the technical enterprises, overall performance of formulation pesticides in 2019 was good.

Analysis of the geographic distribution of the 2020 China Top 100 pesticide enterprises shows that 32 of them are located in Jiangsu Province, while 19 of formulation pesticide enterprises are located in Shandong Province, among the 2020 China Top 100 formulation pesticide enterprises.

In this report, CCM will do analysis of 2020 China Top 100 pesticide enterprises from the following aspects:

- ✓ General situation
- ✓ Imports and exports
- ✓ Pesticide revenue in 2019
- ✓ Geographical distribution of the enterprises

2. Methodology

The report is drafted by diverse methods as follows:

- Desk research

The sources of desk research are various, including published magazines, journals, government statistics, industrial statistics, customs statistics, association seminars as well as information from the Internet. A lot of work has gone into the compilation and analysis of the obtained information. When necessary, checks have been made with Chinese agrochemical players.

- Internet

CCM contacted with players in the domestic agrochemical industry through B2B websites and software as well as obtained registration information on the internet.

- Data processing and presentation

The data collected and compiled are sourced from:

- China Crop Protection Industry Association
- CCM's database
- Published articles in periodicals, magazines, journals and third-party databases
- Statistics from governments and international institutes
- Telephone interviews with domestic producers, joint ventures, service suppliers and governments
- Third-party data providers
- Comments from industrial experts
- Professional databases from other sources
- Information from the internet

The data 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 held in order to analyse the data and draw the conclusions.

Table Abbreviations and full names

Abbreviation	Full Name
CCPIA	China Crop Protection Industry Association
SG	Water soluble granule
SP	Water soluble powder
TB	Tablet
SC	Suspension concentrate
WG	Water dispersible granule
EC	Emulsifiable concentrate
WP	Wettable powder
AS	Aqueous solution
OD	Oil dispersion
FS	Flowable concentrate for seed treatment
SL	Soluble concentrate
TK	Technical concentrate
ME	Micro-emulsion
EB	Effervescent tablet
FSC	Flowable concentrate for seed coating

3. Executive summary

Though faced with complex and changeable macroeconomic situation in 20XX, China has still further tightened the environmental protection requirements in pesticide industry. This has led to an overall upward trend in raw material prices, which in turn has a certain impact on pesticide manufacturers' profitability. In 20XX, China's pesticide industry achieved slight growth in both revenue and profit against the background of increasing downward pressure on the industry. Specifically, chemical pesticide industry witnessed growth in revenue but decline in profit; biochemical and microbial pesticide enjoyed significant increases in both revenue and profit.

In 20XX, China's pesticide import and export trade surplus value declined for the first time since 20XX, owing to deterioration of the external environment like the Sino-US trade frictions and the global economic downturn. According to the data from the National Bureau of Statistics, China's pesticide import and export value totaled USDXXX million in 20XX, with a yearly decrease of XXX%. The trade surplus value was USDXXX million, decreasing by XXX% year on year. In addition, value of import, export and the trade surplus of various pesticides have declined to varying degrees.

In 20XX, externally, China's pesticide industry has experienced turbulences from the Sino-US trade war, exchange rate fluctuations and economic downturn. As merger and integration of agrochemical companies at home and abroad accelerated, resources became more concentrated. Internally, the industry has gone through tremendous changes with implementation of new regulations and policies concerning pesticide management, unprecedented pressures from requirements for work safety and environmental protection and supply-side reform. For domestic pesticide industry players, structural optimization was the theme of the year 20XX.

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 Review of China's pesticide industry in 2019

1.1 General situation

Though faced with complex and changeable macroeconomic situation in 20XX, China has still further tightened the environmental protection requirements in pesticide industry. This has led to an overall upward trend in raw material prices, which in turn has a certain impact on pesticide manufacturers' profitability. In 20XX, China's pesticide industry achieved slight growth in both revenue and profit against the background of increasing downward pressure on the industry, but the growth rate slowed down. Specifically, chemical pesticide industry witnessed growth in revenue but decline in profit; biochemical and microbial pesticide enjoyed significant increases in both revenue and profit.

Statistics of the XXX pesticide enterprises above designated size from the National Bureau of Statistics show that total assets of pesticide industry reached USDXXX million (RMBXXX billion) with a year-on-year increase of XXX% in 20XX, revenue with a rise of XXX% and total profit just with an increase of XXX%. From the sub-industry perspective, obvious improvement can be seen in the biochemical & microbial pesticides. Total assets and total profit of the biochemical & microbial pesticides both witnessed double-digits yearly growth in 20XX, XXX% and XXX% respectively. Besides, its revenue increased by XXX% year on year. On the other hand, the total profit of chemical pesticide suffered a decrease in 20XX, even though total assets and revenue both saw year-on-year increases.

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Table 1.1-1 Major economic indicators of pesticide enterprises above designated size in China, 20XX, million USD

Item	Number of companies	Total assets		Revenue		Total profit	
		20XX	YoY change	20XX	YoY change	20XX	YoY change
Pesticide industry	XXX	XXX	XXX	XXX	XXX	XXX	XXX
- Chemical pesticide	XXX	XXX	XXX	XXX	XXX	XXX	XXX
- Biochemical and microbial pesticide	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: National Bureau of Statistics

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Table 1.1-2 Output (converted into 100% AI) of chemical pesticide technical in China in 20XX, '000 tonnes

Category	2019	2018	YoY change
Herbicide	XXX	XXX	XXX
Insecticide	XXX	XXX	XXX
Fungicide	XXX	XXX	XXX
Others	XXX	XXX	XXX
Total	XXX	XXX	XXX

Source: National Bureau of Statistics

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1.2 Imports and exports

In 20XX, China's pesticide import and export trade surplus value declined for the first time since 2016, owing to deterioration of the external environment like the Sino-US trade frictions and the global economic downturn. According to the data from the National Bureau of Statistics, China's pesticide import and export value totaled USDXXX million in 20XX, with a yearly decrease of XXX%. The trade surplus value was USDXXX million, decreasing by XXX% year on year. In addition, value of import, export and the trade surplus of various pesticides have declined to varying degrees.

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Table 1.2-1 Total pesticide import & export and trade surplus value, 2019, million USD

Category	Total amount of imports and exports	YoY change	Trade surplus	YoY change
Pesticide	XXX	XXX	XXX	XXX
- Herbicide	XXX	XXX	XXX	XXX
- Insecticide	XXX	XXX	XXX	XXX
- Fungicide	XXX	XXX	XXX	XXX

Source: CCM & National Bureau of Statistics

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2 Top pesticide enterprises in China

2.1 2020 China Top 100 pesticide enterprises

In 20XX, externally, China's pesticide industry has experienced turbulences from the Sino-US trade war, exchange rate fluctuations and economic downturn. As merger and integration of agrochemical companies at home and abroad accelerated, resources became more concentrated. Internally, the industry has gone through tremendous changes with implementation of new regulations and policies concerning pesticide management, unprecedented pressures from requirements for work safety and environmental protection and supply-side reform. For domestic pesticide industry players, structural optimization was the theme of the year 20XX.

Table 2.1-1 List of 2020 China Top 100 Pesticide Enterprises

No.	Enterprise	Pesticide revenue in 2019, million RMB	Pesticide revenue in 2019, million USD	Pesticide revenue in 2018, million RMB	Pesticide revenue in 2018, million USD	YoY change	Ranking in 2018	Ranking change
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
...
99	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
100	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCPIA & CCM

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3 Top pesticide formulation enterprises in China

3.1 2020 China Top 100 pesticide formulation enterprises

In 20XX, the top list of pesticide formulation enterprises has increased to the top 100. Previously, only the top 50 pesticide formulation enterprises were released. Enterprises in the 2020 Top 100 List for pesticide formulation business achieved total revenues of USDXXX million (RMBXXX million) in 20XX. Sales threshold for the Top 100 list this year is USDXXX million (RMBXXX million). Among the top 100 formulation enterprises, the total sales of the top 10 companies reached USDXXX million (RMBXXX million), accounting for XXX% of the total sales, an increase of XXX% compared with the same period last year. What's more, 2020 Top 10 also saw a huge leap in the revenue combined. It's worth noting that there are XXX companies with sales more than USDXXX million (RMBXXX billion), one more than the previous year; XXX companies have sales over USDXXX million (RMBXXX million), six more than last year. Compared with the technical enterprises, the average sales of formulation enterprises was smaller, but the overall performance in 20XX was still good.

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Table 3.1-1 List of 2020 China Top 100 Pesticide Formulation Enterprises

No.	Enterprise	Pesticide revenue in 2019, million RMB	Pesticide revenue in 2019, million USD	Pesticide revenue in 2018, million RMB	Pesticide revenue in 2018, million USD	YoY change	Ranking in 2018	Ranking change	Ranking in the list of 2020 China Top 100 Pesticide Enterprises
1	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...
6	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
7	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: CCPIA & CCM

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

Tel: +86-20-37616606 Fax: +86-20-37616968

Email: econtact@cnchemicals.com

www.cnchemicals.com

E-mail: econtact@cnchemicals.com