

Atrazine Market and Production in China

The Seventh Edition

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Researched & Prepared by:

Kcomber Inc.

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1. Introduction

Atrazine, a triazine herbicide, is widely used worldwide, due to its good herbicidal effect, safety to crops and economical price. China's atrazine is export-oriented, with annual export volume of atrazine technical and formulations (converted to 97% technical) accounting for large share of the domestic annual output every year. In China, most of the atrazine (converted to 97% technical) was exported, and the rest was used to produce atrazine formulations, mainly including 38% SC, 50% SC, 80% WP and 90% WDG for domestic applications in 2017–2020.

China's atrazine technical manufacturers have faced high inventory pressure throughout 2019 and 2020.

In order to help industry players find more opportunities in China's atrazine market, CCM has carried out a comprehensive analysis on atrazine industry, including registration, production, producers, export, consumption, price change, as well as its competing products in China. This report can guide investments and business movements for the players who pay close attention to atrazine industry.

This is CCM's seventh edition report on China's atrazine industry and it attaches importance to the following parts:

- ✓ Position of atrazine in Chinese herbicide industry, 2015–2019
- ✓ Registration of atrazine in China, as of 18 Jan. 2021
- ✓ Capacity and output of atrazine technical in China, 2017–2020
- ✓ Capacity and output of major atrazine technical producers in China, 2017–2020
- ✓ Export analysis of atrazine products in China, 2017–H1 2020
- ✓ Price of atrazine in China, 2017–2020
- ✓ Apparent consumption of atrazine (converted to 97% technical) in China, 2017–2019
- ✓ Actual consumption volume of major atrazine formulations in China, 2017–2019
- ✓ Comparison among atrazine and its major substitutes in China, 2020

2. Approach for this report

Methodology and source

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 market information such as production, demand, and competition.

Telephone interviews

CCM carried out extensive telephone interviews with major participants in the industry chain of the products mentioned in this report throughout upstream to downstream. The interviewees cover:

- Manufacturers
- Traders
- Industrial associations
- Local governments
- Researchers and experts
- Farmers

Data processing and presentation

The data collected and compiled are sourced from:

- Published articles from Chinese periodicals, magazines, and journals
- Government statistics & customs statistics
- Telephone interviews with Chinese manufacturers, traders, government and farmers
- Comments from industrial experts
- CCM's database
- Information from the Internet
- Third-party databases

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 analyse the data and draw conclusions from them.

Definition and glossary

In this report, when "atrazine" is mentioned, it includes both atrazine technical and atrazine formulations.

Apparent consumption equals production + import - export, which is one of the factors reflecting demand. Assuming the inventory stays the same every year, the apparent consumption also equals to the actual consumption.

Unit

USD: US dollar, currency unit in the US

RMB: currency unit in China, also named Renminbi

Tonne: ton equals to metric ton in this report

/t: per tonne

t/a: tonne per year, tonne/annum

Table Main abbreviations and their full names in the report

Abbreviation	Full name
AI	Active ingredient
ICAMA	The Institute for the Control of Agrochemicals, Ministry of Agriculture
SC	Suspension Concentrate
SE	Suspension Emulsion
WDG	Water Dispersible Granule
WP	Wettable Powder
AS	Aqueous Solution
EC	Emulsifiable Concentrate
OD	Oil Dispersion
CAGR	Compound Annual Growth Rate

Table USD/CNY exchange rate, 2016–2020

Year	Jan.	Feb.	March	April	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
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	6.5909	6.6493	6.6300	6.6067	6.7662
2018	6.5079	6.3045	6.3352	6.2764	6.3670	6.4078	6.6157	6.8293	6.8347	6.8957	6.9670	6.9431	6.6070
2019	6.8482	6.7081	6.6957	6.7193	6.7344	6.8896	6.8716	6.8938	7.0883	7.0726	7.0437	7.0262	6.8826
2020	6.9614	6.9249	6.9811	7.0771	7.0690	7.1315	7.0710	6.9980	6.8498	6.7796	6.7050	6.5921	6.9284

Source: The People's Bank of China

3. Executive summary

Atrazine, a triazine herbicide, is widely used worldwide, due to its good herbicidal effect, safety to crops and economical price. China is not only a high consumption country of atrazine at home, but also a key supplier at abroad.

- Production

During 2017–2020, both capacity and output of atrazine technical have gone through fluctuations. Domestic capacity of atrazine technical increased from XXX t/a in 2017 to XXX t/a in 2018, and the output in 2018 witnessed XXX% year on year. In 2019–2020, the capacity and output XXX. The output of atrazine was about XXX tonnes in 2020, XXX% as compared with that in 2018.

- Import & export

China's atrazine is export-oriented. Export volume of atrazine technical and formulations (converted to 97% technical) usually takes large proportion to the domestic annual output. In 2019, the export volume of atrazine (converted to 97% technical) in China was XXX tonnes, XXX% year on year. And Brazil was the largest importer of China's atrazine products in the world in 2019.

- Price

In 2019, the price of atrazine technical in China showed a XXX, mainly due to XXX. Although the price of raw material cyanuric chloride XXX to some extent, XXX played the dominant role. Moreover, the price XXX in general in 2020.

- Consumption

In China, about XXX% of atrazine (converted to 97% technical) was exported before 2018, but in 2018 the proportion saw a XXX. There was a XXX in China's atrazine technical output in 2018, yet overseas demand from downstream sectors was XXX, since inventory from 2017 had to be consumed first in international market. In 2019, export demand XXX.

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 atrazine industry in China

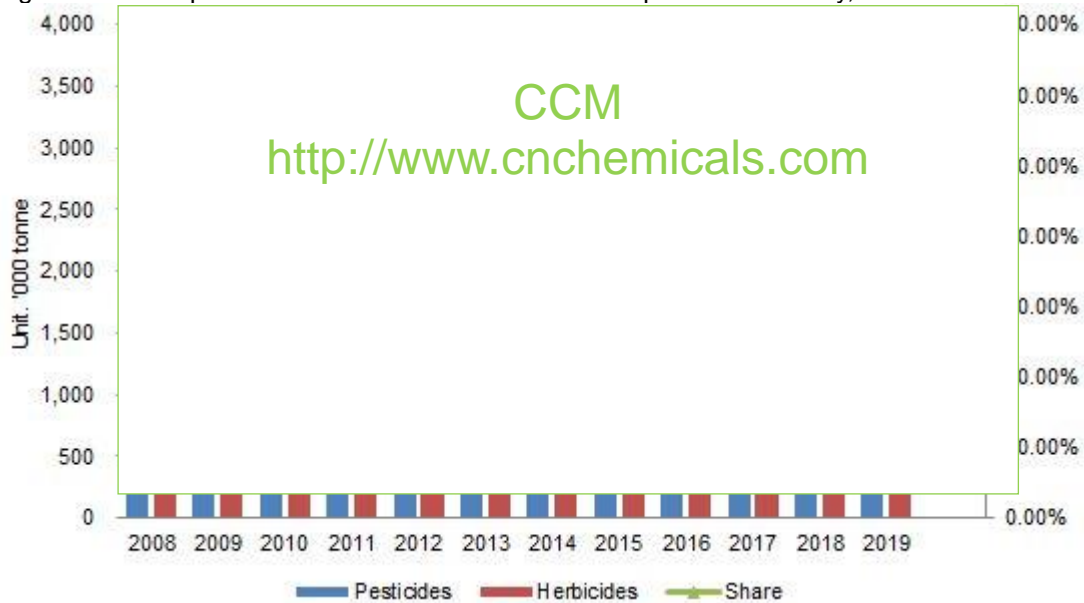
1.1 Brief introduction to pesticide industry in China

- Supply and demand

China is now a major herbicide supplier globally. China's herbicide industry has developed rapidly in the past few years, which was reflected by XXX and the growing number of varieties available. However, the output of herbicides showed a general downward trend in recent years, with the implementation of stringent environmental protection policies in China. Yet in 2019, China's herbicide output (by 100% technical) was XXX tonnes, XXX by XXX% year on year.

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Figure 1.1-1 Output and share of herbicides in China's pesticide industry, 2008–2019



*Note: All the volumes are calculated by 100% technical.
Source: National Bureau of Statistics of China*

- Import and export

Table 1.1-1 China's imports and exports of pesticides, 2017–2019

Year	Pesticides				Herbicides				Share			
	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
2017	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2018	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2019	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: China Customs

...

3 Supply of atrazine in China, 2015–2018

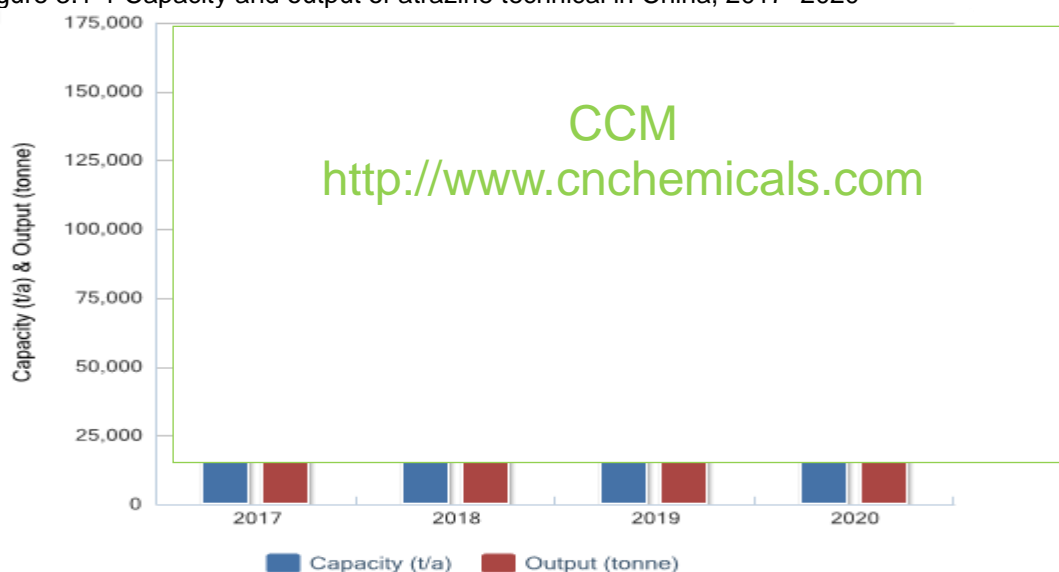
3.1 Summary of atrazine technical production

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During 2017–2020, both capacity and output of atrazine technical saw some ups and downs. In 2017–2018, domestic capacity increased from XXX t/a to XXX t/a, and the output witnessed a XXX% year-on-year growth. Yet from 2019, annual output reduced drastically. In 2020, the output of atrazine was about XXX tonnes, down XXX% from that in 2018. One reason for the rapid decline in 2019–2020 is that the inventory pressure was relatively high and another reason is that strict environmental protection policies have limited the operating rate. Besides, due to weak demand from downstream market, there has been oversupply of atrazine technical in China.

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Figure 3.1-1 Capacity and output of atrazine technical in China, 2017–2020



Source: CCM

Figure 3.1-2 Distribution of capacity of atrazine technical in China by region, 2020



Source: CCM

3.2 Key atrazine technical manufacturers

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Table 3.2-1 Capacity and output of major atrazine technical producers in China, 2017–2020

No.	Producer	Abbreviation	Location	Status, as of the end of 2019	2017		2018		2019		2020	
					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	XXX
2	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
4	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
5	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
6	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
7	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
8	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
9	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
10	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total					XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Note: Zhejiang Zhongshan Chemical Industry Group Co., Ltd. has two atrazine technical production sites, one in Zhejiang Province (20,000 t/a) and the other in Anhui Province (10,000 t/a).
Source: CCM

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4 Circulation of atrazine in China

4.1 Import and export of atrazine, 2017–H1 2020

By month

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Table 4.1-2 China's exports of atrazine by month, 2019

Month	38% SC		48% WP		...		97% Tech.		Total volume (converted to 97% technical, t)	Total value (USD)
	Volume (t)	Price (USD/kg)	Volume (t)	Price (USD/kg)	Volume (t)	Price (USD/kg)	Volume (t)	Price (USD/kg)		
January	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
February	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
March	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
April	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
May	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
June	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
July	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
August	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
September	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
October	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
November	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
December	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Total	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: China Customs & CCM

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By destination

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Table 4.1-6 China's exports of atrazine by destination, 2019

No.	Destination	38% SC (t)	48% WP (t)	...	97% Tech. (t)	Total volume (converted to 97% technical, t)	Total value (USD)
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
...	XXX	XXX	XXX	...	XXX	XXX	XXX
13	XXX	XXX	XXX	...	XXX	XXX	XXX
14	XXX	XXX	XXX	...	XXX	XXX	XXX
...	XXX	XXX	XXX	...	XXX	XXX	XXX
Total		XXX	XXX	...	XXX	XXX	XXX

Source: China Customs & CCM

By exporter

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Table 4.1-10 China's exports of atrazine by exporter, 2019

No.	Exporter	38% SC (t)	48% WP (t)	...	97% Tech. (t)	Total volume (converted to 97% technical, t)	Total value (USD)
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
...	XXX	XXX	XXX	...	XXX	XXX	XXX
Total		XXX	XXX	...	XXX	XXX	XXX

Source: China Customs & CCM

...

By Manufacturer

Table 4.1-14 China's exports of atrazine by manufacturer, 2019

No.	Manufacturer	38% SC (t)	48% WP (t)	...	97% Tech. (t)	Total volume (converted to 97% technical, t)	Total value (USD)
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
...	XXX	XXX	XXX	...	XXX	XXX	XXX
Total		XXX	XXX	...	XXX	XXX	XXX

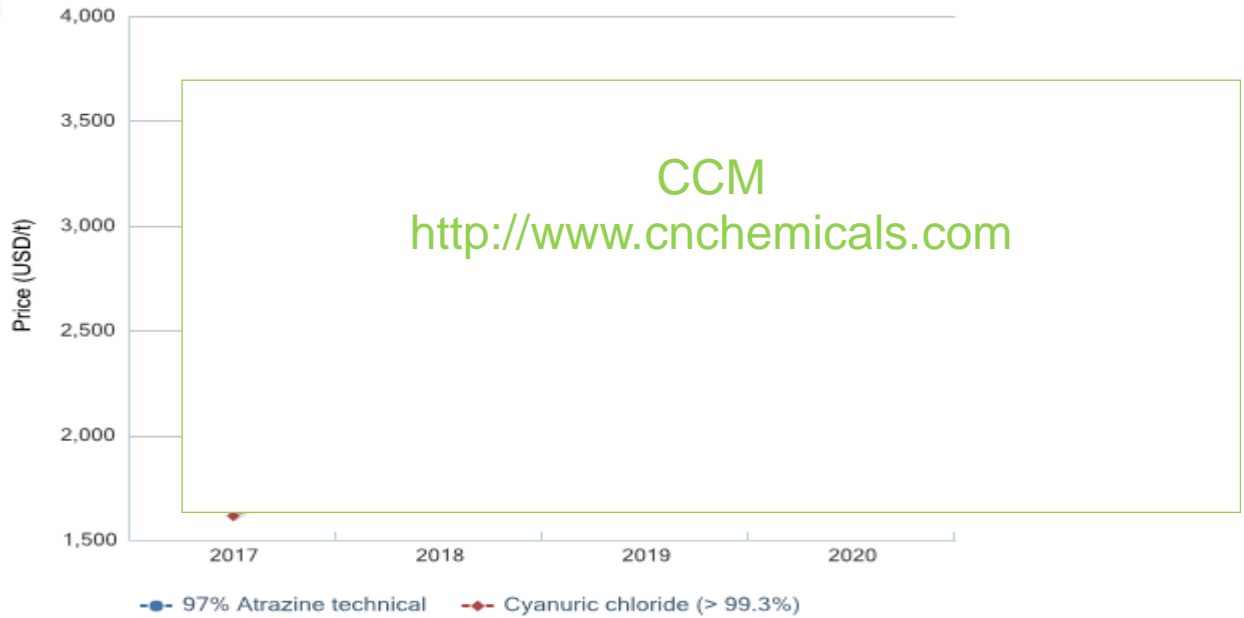
Source: China Customs & CCM

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4.2 Price of atrazine in China, 2017–2020

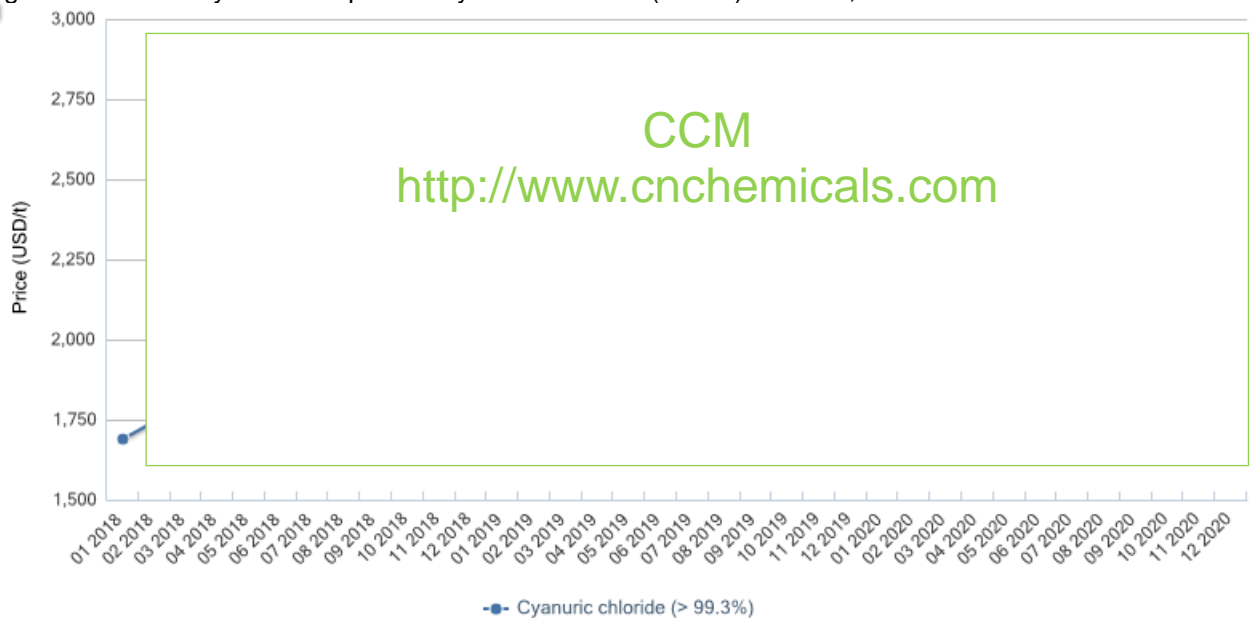
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Figure 4.2-1 Annual ex-works prices of atrazine technical and cyanuric chloride in China, 2017–2020



Source: CCM

Figure 4.2-2 Monthly ex-works price of cyanuric chloride (99.3%) in China, Jan. 2018–Dec. 2020



Source: CCM

Figure 4.2-3 Monthly ex-works price of 97% atrazine technical in China, Jan. 2018–Dec. 2020



Source: CCM

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5 Consumption of atrazine in China, 2017–2019

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Table 5-1 Apparent consumption of atrazine (converted to 97% technical) in China, 2017–2019, tonne

Year	Output	Export	Import	Apparent consumption
2017	XXX	XXX	XXX	XXX
2018	XXX	XXX	XXX	XXX
2019	XXX	XXX	XXX	XXX

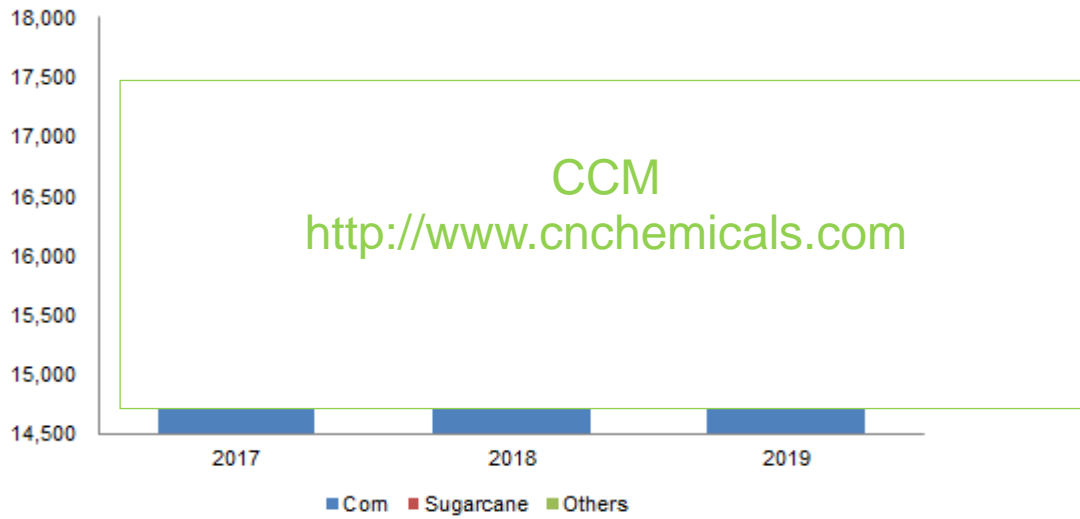
Note: Apparent consumption volume = Output - Export + Import
Source: CCM

Table 5-2 Actual consumption volume and market value of major atrazine formulations in China, 2017–2019

Year	Consumption volume, tonne				
	38% SC	...	80% WP	90% WDG	Total
2017	XXX	XXX	XXX	XXX	XXX
2018	XXX	XXX	XXX	XXX	XXX
2019	XXX	XXX	XXX	XXX	XXX

Source: CCM

Figure 5-1 Actual consumption structure of atrazine formulations (converted to 97% technical) by crop in China, 2017–2019, tonne



Source: 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