



CCM Data & Business
Intelligence

Pesticide Market in China in 2020

The First Edition

May 2021

Researched & Prepared by:

Kcomber Inc.

Copyright by Kcomber Inc.

Any publication, distribution or copying of the content in this report is prohibited.

Contents

Executive summary	1
Methodology	2
1 Pesticide output and consumption volume in China	3
1.1 Output trends of pesticide in China, 2011–2020	3
1.2 Consumption trends of pesticide in China, 2011–2020	4
2 Changes in output in major pesticide production areas	5
2.1 Output and proportion of top 10 pesticide production areas in China, 2020.....	5
2.2 Changes in output of mainstream pesticide production areas, 2011–2020.....	6
3 Concentration of China's pesticide enterprises	12
3.1 Pesticide enterprises above designated size in China, 2011–2020.....	12
3.2 Industrial migration of pesticide enterprises in China	12
4 Trends of pesticide demand in China	14
4.1 Changes in sown area of food crops in China, 2011–2020.....	14
4.2 Occurrence area of the major pests and diseases of main crops in China, 2011–2020.....	15

LIST OF TABLES

Table 2.1-1 Output ranking of China's mainstream pesticide production areas, 2011–2020
Table 3.2-1 Industrial migration dynamics of major pesticide enterprises in China, 2020

LIST OF FIGURES

Figure 1.1-1 Output of pesticide in China, 2011–2020
Figure 1.2-1 Consumption volumes of pesticide in China, 2011–2020E
Figure 2.1-1 Pesticide output of major production regions in China, 2020
Figure 2.1-2 Proportion of regional output of the total in China, 2020
Figure 2.2-1 Pesticide output of Jiangsu Province, 2011–2020
Figure 2.2-2 Pesticide output of Shandong Province, 2011–2020
Figure 2.2-3 Pesticide output of Sichuan Province, 2011–2020
Figure 2.2-4 Pesticide output of Zhejiang Province, 2011–2020
Figure 2.2-5 Pesticide output of Anhui Province, 2011–2020
Figure 2.2-6 Pesticide output of Hubei Province, 2011–2020
Figure 2.2-7 Pesticide output of Hunan Province, 2011–2020
Figure 2.2-8 Pesticide output of Henan Province, 2011–2020
Figure 2.2-9 Pesticide output of Inner Mongolia Autonomous Region, 2011–2020
Figure 2.2-10 Pesticide output of Gansu Province, 2011–2020
Figure 3.1-1 Number of enterprises above designated size in the pesticide industry, 2011–2020
Figure 4.1-1 Sown area of food crops in China, 2011–2020
Figure 4.1-2 Sown area of rice in China, 2011–2020
Figure 4.1-3 Sown area of wheat in China, 2011–2020
Figure 4.1-4 Sown area of corn in China, 2011–2020
Figure 4.2-1 Occurrence area of major crop pests and diseases in China, 2011–2020

1. Introduction

The pesticide output in China rose first and then fell overall in 2011–2020. Thereinto, the output showed an upward trend in 2011–2014. However, pesticide output witnessed declines in 2015–2019. Besides, due to the outbreak of COVID-19 in 2020, pesticide production nationwide stayed at a relatively low level. The declines in recent years are the result of pursuing high-quality and sustainable development, and industry adjustment to the declining demand.

With continuous improvement of living standards and consumption levels in China, people pay more attention to safety, health and environmental protection, and put forward higher requirements on the use of pesticides. In addition, with advances in practical technology, the mechanized and intelligent pesticide application system has been continuously improved, and thus the pesticide use will only go down in the future.

In recent years, affected by supply-side structural reform and the Thirteen Five-Year Plan (2016–2020), the output of pesticides declined significantly, so did the number of pesticide enterprises. In the future, the number of pesticide enterprises will greatly reduce, and the process of industry integration and elimination will speed up. In addition, the tendency of domestic pesticide enterprises to shift to low-cost areas is obvious. In particular, those areas with low labor cost, strong environmental carrying capacity and rich land and energy have become the targets for spatial layout.

In this report, CCM will analyse Pesticide Market in China in 2020 from the following aspects:

- √ Pesticide output and consumption volume in China
- √ Changes in output in major pesticide production areas
- √ Concentration of China's pesticide enterprises
- √ Trends of pesticide demand in China

2. Approach for this report

The report is drafted by diverse methods as follows:

- Desk research

The sources of desk research are various, including published magazines, journals, government websites and statistics, industrial 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.

- Internet

CCM visited government websites and contacted with players in the domestic agrochemical industry through B2B websites and software.

- Data processing and presentation

The data collected and compiled are sourced from:

- 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.

3. Executive summary

According to the National Bureau of Statistics, the pesticide output in China rose first and then followed an overall downtrend in 2011–2020. Decline in pesticide output in 2015–2019 was affected by macroeconomics, policies & regulations, a pursuit of high-quality and sustainable development and industry cyclical fluctuations. Especially in recent years, the overall output and sales volume of pesticide in China have not been high due to the supply-side structural reform in pesticide industry. During these years, Jiangsu Province, Shandong Province, Sichuan Province and Zhejiang Province were the main pesticide production bases in China. With strengthening management in pesticide industry and various province-level supporting measures, pesticide output in each production area has changed accordingly.

In keeping with the development of the times, in 2015 the Ministry of Agriculture and Rural Affairs of the People's Republic of China published the *Action Plan for Zero Growth in Pesticide Use in China by 2020*. Following this policy, China saw the share of high-efficiency, low-toxicity, and environment-friendly pesticides to total pesticide consumption continue to increase, against a backdrop that domestic pesticide use declined constantly and the end-use pesticide market scale reached its peak. It's worth noting that negative growth in pesticide use will be kept as a guide to action in China.

4. What's in this report?

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

...

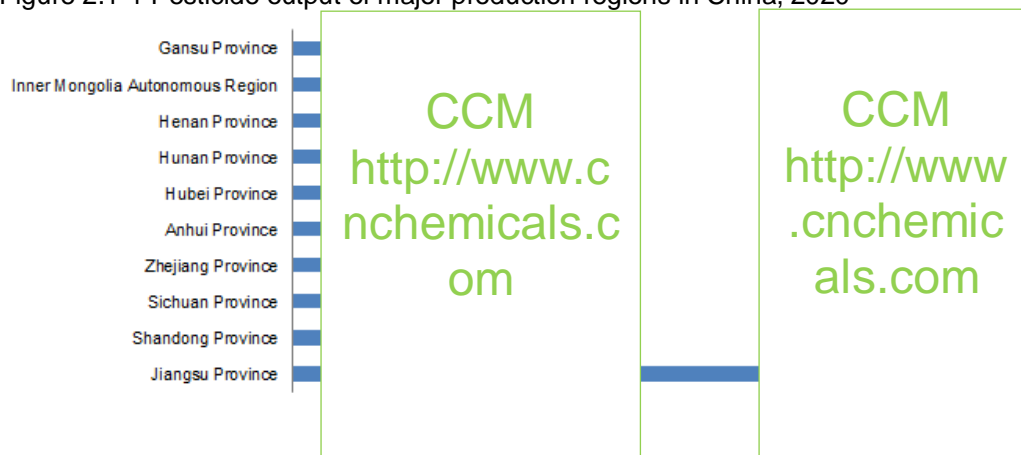
2 Changes in output in major pesticide production areas

2.1 Output and proportion of top 10 pesticide production areas in China, 2020

On the whole, Jiangsu Province, Shandong Province, Sichuan Province and Zhejiang Province were the main pesticide production bases in China in 2011–2020. With strengthening management in pesticide industry and various province-level supporting measures, pesticide output in each production area has changed accordingly.

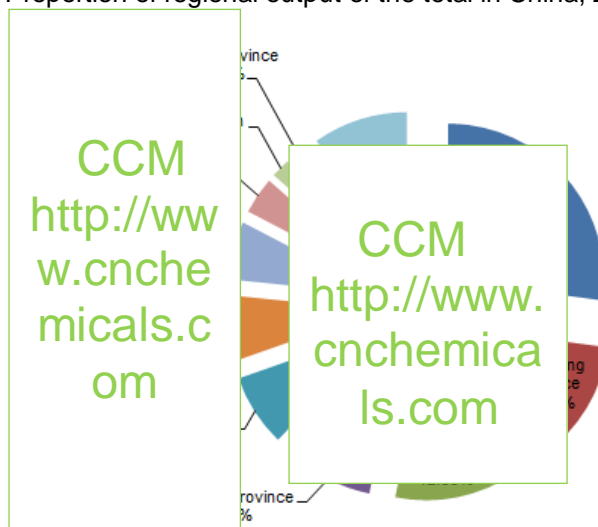
In 2020, pesticide output in Jiangsu Province ranked the first, followed by Shandong Province and Sichuan Province, with their combined output accounting for XXX of the total. Thereinto, the output of Jiangsu Province reached XXX tonnes, accounting for XXX. Sichuan Province is the fastest-growing region as to pesticide production, the output of which has risen from the seventh place in 2011 to the third place in 2020. In 2019, Sichuan Province ranked the second in pesticide production.

Figure 2.1-1 Pesticide output of major production regions in China, 2020



*Note: The output here is converted into 100% AI.
Source: National Bureau of Statistics*

Figure 2.1-2 Proportion of regional output of the total in China, 2020



*Note: The output here is converted into 100% AI.
Source: National Bureau of Statistics*

Table 2.1-1 Output ranking of China's mainstream pesticide production areas, 2011–2020

No.	Region	2020	2019	2018	2017	2016	2015	2014	2013	2012	2011
1	Jiangsu Province	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
2	Shandong Province	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
3	Sichuan Province	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
...
8	Henan Province	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
9	Inner Mongolia Autonomous Region	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
10	Gansu Province	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: National Bureau of Statistics

2.2 Changes in output of mainstream pesticide production areas, 2011–2020

...

Jiangsu Province

In 2012–2017, the pesticide output in Jiangsu kept increasing year on year. However, the output dropped sharply in 2018, down XXX%. Since then, drastic decreases were witnessed.

Figure 2.2-1 Pesticide output of Jiangsu Province, 2011–2020



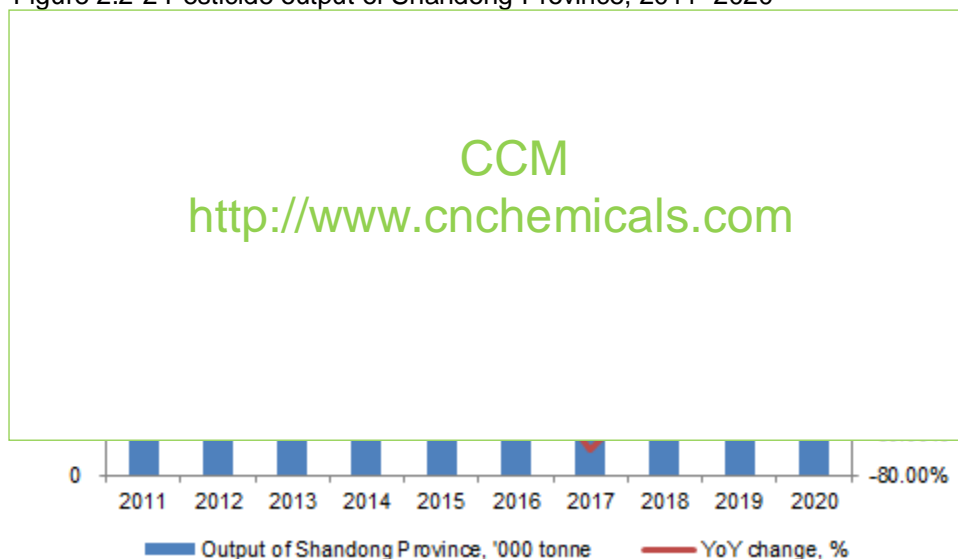
Note: The output here is converted into 100% AI.

Source: National Bureau of Statistics

Shandong Province

...

Figure 2.2-2 Pesticide output of Shandong Province, 2011–2020



Note: The output here is converted into 100% AI.

Source: National Bureau of Statistics

3.2 Industrial migration of pesticide enterprises in China

...

Table 3.2-1 Industrial migration dynamics of major pesticide enterprises in China, 2020

No.	Enterprise	Project location	Main products
1	XXX	XXX	XXX
2	XXX	XXX	XXX
3	XXX	XXX	XXX
4	XXX	XXX	XXX
5	XXX	XXX	XXX
6	XXX	XXX	XXX
7	XXX	XXX	XXX
8	XXX	XXX	XXX
9	XXX	XXX	XXX
10	XXX	XXX	XXX
11	XXX	XXX	XXX
12	XXX	XXX	XXX

Source: CCM

...

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

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

Email: econtact@cnchemicals.com