

# Crop Protection China Monthly Report 202308

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## Abstracts

From Jan. 2022 to July 2023, pesticide prices kept a downtrend, while the situation in 2022 shared much difference with that in Jan.–July 2023.

In 2022, wrestling with stern controls of COVID-19 pandemic and other unfavourable factors, most pesticide producers actively conduct production in a bid to maintain steady supply in the first half of the year, especially those located in East China, with a pesticide output nearly flatlined from that in 2021. Meanwhile, most pesticides were priced higher than those of the previous year. According to CCM's statistics, listed pesticide enterprises on the whole performed remarkably in operating results in 2022. However, some headwinds had emerged since Q3 2022, manifested as tumbled overseas demand in traditional peak season, copious backlog of stocks and sluggish domestic demand for downstream formulations.

In Jan.–July 2023, oversupply doubled down, which directly led to continuous decline in technical price: the first two months experienced a short stable price before the market starting up due to the Spring Festival holiday; while in March–July, the price resumed downtrend from the lower end of market expectation, landing on the brink of touching the cost.

As of Aug. 2023, ex-works price of pesticide hovered at a low level. Specifically, part insecticides recorded a slight rally in price on low operating rate; while prices of herbicides (except for glyphosate) and fungicides kept going down. Following global pesticide market downturn, performance reports released by listed enterprises for H1 2023 had shown significant slow-down growths on pesticide revenue and profit, which is estimated to carry over to the next half year.

So far, part products have seen prices approach the costs, and the constant low prices will disfavour the sound development of market.

Hopefully, the market might recover at the end of 2023 for the following reasons: a) overseas demand is expected to increase in the next pesticide-using season; b) the current historic low-position price will encourage purchase and replenishment amidst domestic downstream formulation producers for next year; c) increasing prominence on safety production and environmental protection will raise production cost, which posts producers to reduce production and consequentially leads to tight supply; d) at the end of 2023, the market is expected to deplete the inventory and technical price is very likely to rebound. In the monthly report, pesticide price trend is analysed at USD price; due to changes in foreign exchange, the USD curve might be inconsistent with the RMB one of ex-works prices in China.

## Contents

Headline 1
Editor's note 4
Overview of China's pesticide industry as of July 2023 5
Supply and demand of pesticides 5
Overall price of pesticides 6
Price analysis of selected herbicides in China, Jan.–July 2023 9
Glyphosate 9
Glufosinate-ammonium 9
Mesotrione 11
Pendimethalin 11
Trifluranlin 12
Nicosulfuron 13
Atrazine 14
Acetochlor 15
Clethodim 16
Diquat 17
Price analysis of selected insecticides in China, Jan.–July 2023 19
Emamectin benzoate 19
Lambda-cyhalothrin 20
Imidacloprid 21
Acetamiprid 22
Malathion 23
Chlorfenapyr 24
Thiamethoxam 25
Bifenthrin 26
Chlorantraniliprole 27
Pymetrozine 28
Prices analysis of selected fungicides in China, Jan.–July 2023 30
Tebuconazole 30
Azoxystrobin 31
Difenoconazole 32
Prochloraz 33
Prothioconazole 34
Propiconazole 35
Pyraclostrobin 36
Carbendazim 37
Trifloxystrobin 38

Cyazofamid 39

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