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Crop Protection China Monthly Report 202407 (12 issues per year)

https://marketpublishers.com/r/CAEA32FE5C25EN.html
Date: July 2024
Pages: 39
Price: US$ 1,620.00 (Single User License)
ID: CAEA32FE5C25EN

Abstracts

In H1 2024, the total pesticide production in China increased by 54.47% YoY.

Since H2 2023, the ex-works prices of Chinese pesticides have been on a downward trend due to overcapacity and industry downturn. This trend is expected to continue in the short term but gradually stabilise in the long term.

In 2023, global pesticide stocks were in surplus, leading to a continued decline in the ex-works price of glyphosate technical. Briefly in July and August 2023, increased domestic and overseas demand temporarily pushed up the price, which subsequently resumed its downward trend. In H1 2024, the ex-works price stabilised from decline.

The ex-works price of glufosinate-ammonium continued to decline in H1 2024, albeit at a slower pace, and this trend is expected to persist into H2 2024.

In June 2023–June 2024, the ex-works price of acetochlor has steadily decreased, indicating an overall downward trajectory. This trend is expected to continue through H2 2024, with prices stabilising at lower levels.

The ex-works price of pendimethalin has shown a steady decline from June 2023 to June 2024, and this downward trend is expected to continue into H2 2024.

Trifluralin exhibited an overall stable price trend from June 2023 to June 2024, characterised by occasional declines following by sustained stability. This trend is anticipated to persist into H2 2024.

In H1 2024, the ex-works price of nicosulfuron stabilised, and is expected to continue

this stability or experience a slight decline in H2 2024. The ex-works price of clethodim stabilised in H1 2024 and is expected to remain steady in H2 2024.

In H1 2024, atrazine supply remained ample, leading to stable price. It is anticipated that the price will maintain steady or see a slight decline in H2 2024.

The ex-works price of diquat continued to decline in H1 2024 and a slower price decrease is expected in H2 2024, driven by subdued market demand and diquat's less competitive price compared to other non-selective herbicides.

Mesotrione price remained stable in H1 2024 and is anticipated to continue at low levels in H2 2024.

In H1 2024, demand for emamectin benzoate remained stable with no significant easing in supply tightness, leading to price increases. It is expected that the price will continue to trend upwards in H2 and gradually stabilise.

In H1 2024, imidacloprid faced persistently weak downstream demand, leading to continued price decline, which is anticipated to extend into H2 2024.

The ex-works price of malathion has remained stable since Nov. 2023 and is expected to continue this trend through H2 2024.

In H1 2024, pymetrozine saw an overall sustained price rise due to increased downstream demand and tight upstream raw material supply. This upward trend is expected to persist into H2 2024, characterised by fluctuations.

In H1 2024, the ex-works price decline of lambda-cyhalothrin narrowed, stabilising after an initial drop in Q1. The market is expected to remain sluggish in H2 2024, with price showing a stable-to-decreasing trend.

In H1 2024, the bifenthrin market faced subdued demand, leading to a sustained decline in ex-works price, a trend expected to continue into H2 2024.

The ex-works price of chlorfenapyr exhibited slight fluctuations in H1 2024, remaining generally stable with a slight decline, a trend anticipated to continue into H2 2024.

In H1 2024, the ex-works price of fipronil remained stable overall. It is anticipated that supply and demand will stabilise in H2 2024, with the price continuing to remain steady.

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Acetamiprid ex-works price continued to fall in H1 2024 and is expected to stabilise with slight decreases in H2 2024.

In H1 2024, the production capacity of chlorantraniliprole continued to expand, leading to a sustained drop in price. It is expected that both supply and demand will increase in H2 2024, with the ex-works price continuing to decline.

Since 2023, demand for difenoconazole has remained weak, resulting in a gradual decline in ex-works price. This trend is expected to persist into H2 2024, with little improvement in demand.

In H1 2024, propiconazole ex-works price continued to decline, albeit at a slower rate. With limited improvement in demand expected in H2 2024, the price is anticipated to maintain a gradual decline, trending towards stability.

In H1 2024, the ex-works price of tebuconazole saw a slight decline while stabilising. This trend is expected to persist into H2 2024, with little improvement expected in demand.

In H1 2024, the ex-works price of azoxystrobin continued to decline overall amid weak demand, with the decrease rate gradually narrowing. It is anticipated that this downward trend will persist into the H2 2024, moving towards stability.

In H1 2024, the price of carbendazim gradually stabilised. With supply and demand expected to remain steady, continued price stability is anticipated for H2 2024.

In H1 2024, prochloraz saw a temporary increase in ex-works price due to reduced supply caused by equipment maintenance, followed by a decline. It is anticipated that in H2 2024, the price will initially decrease as manufacturers resume normal operations, then stabilise.

In H1 2024, the ex-works price of cyazofamid remained stable with a slight decrease. It is anticipated to maintain this stability into H2 2024, with minimal room for further price decline.

In H1 2024, the supply and demand for trifloxystrobin remained stable, with ex-works price maintaining a steady trend. This stability is anticipated to persist into H2 2024 with minimal fluctuations.

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Since 2023, prothioconazole has gained increased market attention, leading to capacity expansion and continued price decline. It is expected that capacity will continue to expand in H2 2024, maintaining a downward price trend.

In H1 2024, the ex-works price of epoxiconazole saw a slight decline, which is expected to remain relatively stable in H2 2024.

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