

Financial Analysis of Chinese Listed Pesticide Enterprises

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Abstracts

In H1 2021, with the global COVID-19 easing, China's domestic economy continued to recover and a large number of orders poured into China as the operating rate of basic chemicals in the international market was insufficient, driving up the rise of bulky varieties of herbicide. According to the data of Sino-Agri, the price index of herbicide TC reached 158.86 points on 27 June, hitting a new high in the past decade. Among the herbicide products, the sales price of glyphosate continued to rise, up by 126.40% year on year.

In this report, we will focus on 25 selected Chinese pesticide companies' 2021 semi-annual reports and understand the current development of China's pesticide industry market. Regarding the performance of revenue in H1 2021, 20 of them have positive revenue growth. The total growth rate of them increased to nearly 16% year on year. Thereinto, AMDAMA Ltd. ranked the first, whose revenue was far beyond its counterparts. Meanwhile, Sichuan Hebang, Jiangsu Suli, Lianhetech and Anhui Guangxin saw revenue grow over 40% year on year. The highest growth rate of net profit was ranked, as well as R&D investment, etc.

Nowadays, China's agrochemical enterprises face fiercer competition. According to the tracking of 100 active pesticide varieties in China in H1 2021, the prices of 35 varieties rose, while 51 fell and 14 remained as usual. In addition, due to China's favorable policies of the domestic agricultural industry, as well as the promotion of CO2 peak and neutrality, the pesticide industry will also carry out green transformation, accelerate the elimination of backward production capacity, and maintain the high operation of pesticide prices. Under the stimulation of various factors, the performance of listed pesticide enterprises will be affected in 2021 and the next two years.

In this report, CCM will analyse 25 major listed pesticide companies in China in H1 2021 from the following aspects:

Total revenue

Net profit

Net cash flow

Total assets

Net assets

R&D expenses

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