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Financial Analysis of Chinese Listed Pesticide Enterprises in H1 2023

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Abstracts

In H1 2023, global economic downturn and oversupply fuelled market competition of agrochemical products, leading to price slides in varied extents. Backlog of stocks, continuous slipping price and reduced trade volume brought about underperformance of major listed companies. First off, the H1 revenue marked a slump, as a result of plummeting product price and sales volume on sluggish demand from downstream formulations and delayed delivery of foreign orders. Second, most of the agrochemicals suffered an undercut in profitability. Multiple glyphosate players (like Hubei Xingfa Chemicals Group Co., Ltd., Nantong Jiangshan Agrochemical & Chemicals Co., Ltd., Sichuan Hebang Bio-technology Co., Ltd. and Zhejiang Wynca Chemical Industrial Group Co., Ltd.) unveiled a slack performance with plunging profit due to oversupply of glyphosate technical in domestic, long-term price drop and sharp order declines, set as an example.

In the last half of 2023, the market places hopes to destock smoothly and stablise the price in a bid to restore market order and make business performance better off. Meanwhile, China's pesticide industry should leverage its own edges, such as low production cost and integrated industrial chain, to lift export demand and break free from the current plight.

In this report, CCM will focus on 28 selected Chinese pesticide companies' 2023 semi-annual reports and understand the current development of China's pesticide industry market from the following aspects:

Total revenue

Net profit

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Net cash flow

Total assets

Net assets

R&D expenses

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2.21 Shandong Cynda Chemical Co., Ltd.
2.22 Jiangsu Flag Chemical Industry Co., Ltd.

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