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Abstracts

In July, the fungicide market exhibited a weak trend, with prices of some fungicide TC remaining stable while most decreased. On average, prices fell by 0.53% MoM and by 7.27% YoY. A small number of fungicide TC experienced price increases due to low inventory or higher raw material costs. Prices for most major raw materials used in fungicide TC also declined, with an average monthly decrease of 3.72%. As downstream demand gradually levelled off, prices of certain basic chemical raw materials also decreased.

In terms of company dynamics, Hailir, LFBC, and Suli all forecasted significant declines in net profits for H1 2024, with LFBC expected a notable loss for this period. Public review for the environmental protection acceptance monitoring report of Shandong Hailir Chemical Co., Ltd. (Shandong Hailir)'s novel fungicide TC, herbicide TC, and intermediate construction project (Phase I) was concluded. This project planned production capacity for 3,000 t/a prothioconazole TC. In late June, the Lanzhou New Area Ecological Environment Bureau announced the acceptance of the environmental impact report of Daoyan Chemical Co., Ltd. (Daoyan Chemical)'s a 2,000 t/a pesticides TC project (Phase II), which planned to add production capacity for 100 t/a bupirimate and 300 t/a fluopyram.

As for policy, the Shanxi Provincial People's Government unveiled a programme to speed up the waste recycling system development, which outlines targets including the annual utilisation of over 200 million tonnes of industrial solid waste, a straw utilisation rate exceeding 90%, and a livestock and poultry manure utilisation rate surpassing 83%.

Regarding registration, ICAMA publicised the seventh batch of pesticides that it had

planned to approve of registration, which includes 54 fungicide products, with the majority being in the SL formulation and of low toxicity.

As to disease, the Shaanxi Plant Protection Station released its assessment of apple disease occurrences, indicating an overall mild incidence. Predictions suggested mild occurrences of apple rust and apple powdery mildew in the coming stages, while apple early leaf defoliation diseases would be heavy overall. The analysis and consultation conference on major autumn grain pest and disease trends concluded that autumn grain diseases would generally occur at moderate to severe levels in China in H2 2024.

On the part of trade, in June 2024, exports of China's fungicide formulations jumped to 20,139.69 tonnes, up 58.39% YoY, with the export value rising by 33.26% YoY to USD82.53 million, despite an average price drop of 15.87% YoY.

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