

Pesticide Price Analysis in China in 2023

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Abstracts

In 2023, China's domestic economy gradually recovered with the COVID-19 pandemic ending and strict pandemic control dismantled, the pesticide market performance was barely satisfactory though. Under high prominence and protection of agriculture by the government, China's pesticide market on the whole maintained a stable developing trend, yet turbulence on the globe, such as the sustained Russia-Ukraine conflict and the outbreak of Israel-Hamas war, has posed side effect on the global economy, plus the uncertainty factors such as increasing extreme weather have laid certain brunt and negative influence on the pesticide industry, leading to an unusual trend of agrochemical industry in H2 2023.

First of all, the three main pesticide categories (herbicides, insecticides and fungicides) continued the H1 price downtrend in H2 2023. Secondly, total pesticide exports (actual volume) and value during H2 marked double-digit half-year growths compared with those in H1, when the export volume, no matter calculated by actual volume or 100% AI volume, and the export value showed negative growths as results of over-hoarding and excessively high price at abroad during the pandemic. Furthermore, the slipping technical price also pared down the end formulation price, causing large domestic consumers of pesticide technical such as formulation producers and channel distributors to be more cautious about procurement and winter stocking-up—most of which adopted multiple-purchasing-and-low-amount mode, bringing much pressure to technical enterprises.

In 2019–2023, the China Agrochemical Price Index (CAPI) marked yearly growths in 2021 and 2022 while declines in the other three years. Thereinto, herbicides registered the largest YoY change in the index overall among the three main pesticide categories. In this report, CCM will do analysis of the prices of pesticides in China from the following aspects:

Overview of China's pesticide AI prices in 2023

Price analysis of herbicides

Price analysis of insecticides

Price analysis of fungicides

Forecast

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