

Pesticide Price Analysis in China in Jan.–July 2023

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Abstracts

From Jan. 2022 to July 2023, pesticide prices kept a downtrend, while the situation in 2022 shared much difference with that in China, Jan.–July 2023. In 2022, wrestling with stern controls of COVID-19 pandemic and other unfavourable factors, most pesticide producers actively conduct production in a bid to maintain steady supply in the first half of the year, especially those located in East China, with a pesticide output nearly flatlined from that in 2021. Meanwhile, most pesticides were priced higher than those of the previous year.

According to CCM's statistics, listed pesticide enterprises on the whole performed remarkably in operating results in 2022. However, some headwinds had emerged since Q3 2022, manifested as tumbled overseas demand in traditional peak season, copious backlog of stocks and sluggish domestic demand for downstream formulations. In Jan. 2023, oversupply doubled down, which directly led to continuous decline in technical price: the first two months experienced a short stable price before the market starting up due to the Spring Festival holiday; while in March–July, the price resumed downtrend from the lower end of market expectation, landing on the brink of touching the cost.

So far, part products have seen prices approach the costs, and the constant low prices will disfavour the sound development of market. Hopefully, the market might recover at the end of 2023, as the supply will get tight due to raised costs from more and more stringent supervision on safety production and environmental protection, almost depleted inventory, increasing demand in pesticide-using season, as well as the rising sentiment of replenishment owing to the existing low price.

In this report, CCM will do analysis of the prices of 30 selected pesticides in China in 2023 from the following aspects:

Overview of China's pesticide industry as of July 2023

Price analysis of herbicides in China, Jan.–July 2023

Price analysis of insecticides in China, Jan.–July 2023

Price analysis of fungicides in China, Jan.–July 2023

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