

Pesticides White Paper

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Abstracts

Pesticides hot topics in 2013:

In February 2013, the State Administration of Taxation (SAT) issued the 2013 Product Catalog, in which the export rebate rate of PMIDA turned from 13% to 0. This move not only restricted the export of China's PMIDA but also increased the production cost of IDA-producing glyphosate manufacturers from other countries.

In May 2013, the Ministry of Environmental Protection issued an official announcement to start the environmental protection scrutiny of glyphosate (PMIDA) industry. And the Guide of Glyphosate (PMIDA) Industry Environmental Scrutiny was issued and clearly stipulated the recycling and management standards of the glyphosate mother liquor, which regarded the restriction whether the mother liquor was illegally used in the preparation of glyphosate AS as one of the scrutiny items, and quantization was also listed in the requirements. The scrutiny caught the key points of clean production of glyphosate and will spare no efforts to promote China's glyphosate industry to develop sustainably.

The Ministry of Commerce issued the Announcement No.55 [2012] on September 21st 2012, which decided to conduct anti-dumping investigation on imported pyridine from Japan and India. After the investigation, according to the relevant provisions of Anti-dumping Regulations, the Customs Tariff Commission of the State Council made a decision that since November 21st 2013, the anti-dumping duties would be imposed to the imported pyridine originated from Japan and India and the time limit would be five years. The victory of pyridine antidumping led to the prosperity of the whole industry chain in China, and paraquat, as one of the products benefiting from it, has a rising

price ever since.

Background:

China's pesticide industry is promising, its output volume and consumption volume reached 3.19 million tonnes and 0.4 million tonnes respectively in 2013, both hit new records and enhanced the confidence towards the investment value. Besides, herbicides performed quiet well in these years, occupying the largest pie in China's pesticide market both in output and consumption. Behind the flourishing, several policies and regulations have carried out, some changes are about to occur.

Purpose of report:

CCM has collected lots of information in various ways and used appropriate methods to analyze. Substantial data and information are tidied and performed as various graphs. Through this report, we can see how glyphosate become the hottest part in China, figure out the potential products by comparing their output, consumption and price. The performance of pesticides in the past ten years was shown in the most direct and explicit way.

What to report

In this report, three main categories of pesticides were introduced respectively by 10 major products. It began with the overview of the whole pesticide industry in the past ten years. After that, the performance of its three main pesticide categories from 2009-2013 was reviewed and top ten products of each category were elaborated one by one through capacity and output, major manufacturers, price, consumption, and export.

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