

Production and Market of Non-Crop Pesticides in China

<https://marketpublishers.com/r/PA889DA58D6EN.html>

Date: October 2010

Pages: 86

Price: US\$ 17,876.00 (Single User License)

ID: PA889DA58D6EN

Abstracts

As a branch of pesticide industry comparatively to crop pesticide, Chinese non-crop pesticide industry has been witnessing fast development in the first 10 years of the 21st century, valuing USD1,996.80 million in 2009 at the end-user level, with CAGR of 14.21% from 2000 to 2009.

In the study, research scope of non-crop pesticide market includes eight segments, namely self-applied, public health, seasonal and ornamental crops, industrial weed control, forestry, turf, timber treatment and animal health.

By the downstream application segments, self-applied dominates non-crop pesticide market in China, due to large population of China and high added value of self-applied pesticides.

And by the pesticide type, insecticides, especially pyrethroids, occupy absolute predominance in the non-crop pesticide market.

Insecticides. Pyrethroid is the largest class capturing over 70% share of total non-crop insecticide market. There are nine insecticides with over 3% share, and only one doesn't belong to pyrethroids, and new active ingredients has gradually seized market share of traditional ones.

Rodenticide. Bromadiolone and sodium diphacinone are the most popularly used two rodenticides in China, accounting for about 43% and 25% share in the rodenticide market respectively.

Fungicide. Seasonal and ornamental crops, turf and forestry are the three largest market segments of non-crop fungicides. Chlorothalonil, carbendazim and mancozeb are the largest fungicides for non-crop use in China, totally accounting for 32% share.

Herbicide & PGR. Glyphosate and paraquat are the most popular herbicides for non-crop use, with the value of USD20.73 million and USD10.98 million in 2009 respectively, and gibberellic acid is the most popularly used PGR for non-crop use.

As for the supply of non-crop pesticide technical, Jiangsu Yangnong, Aestar (Zhongshan), and Changzhou Kangmei, as the three largest domestic pyrethroid manufacturers dominate over 90% of the whole supply of pyrethroids for non-crop application, while other non-crop pesticide technical is mostly supplied by the pesticide manufacturers regarding crop pesticides as main business.

For the industry structure of non-crop pesticide industry, all of the top 10 manufacturers take self-applied pesticides as main business, totally capturing 53.16% of total sales amounts of non-crop pesticide industry in 2009, and the distribution and marketing of self-applied manufacturers are also different from that of pesticides in public health and other non-crop segments.

With the sustained healthy development of Chinese economy, non-crop pesticide industry will also exert commercial opportunities, including:

Stable market growth of self-applied pesticides especially for cockroach control

R&D and promotion of water-based formulation

Non-crop fungicides applied in flower, urban landscaping, forestry, home garden, etc.

New fumigants to substitute existing products which are harmful to environment.

This is CCM's first edition report as well the first report with in-depth study of China's non-crop pesticide market. It attaches importance to the following parts:

Market value of non-crop pesticides and market share by segments.

Market structure of non-crop pesticides by pesticide types and active ingredients.

Detailed study of eight market segments, from aspects of market size, active ingredients, brand, formulation types, use habit and so on.

Supply and demand situation of non-crop pesticides by active ingredients.

Identification of major market player of non-crop pesticide industry and their market share

Marketing and distribution channels of non-crop pesticide manufacturers

Commercial opportunities of non-crop pesticide industry.

This report is helpful to:

Companies engaged in production, R&D and sales of non-crop pesticides

Agents, distributors and retailers paying close attention to China's non-crop pesticide industry and market

Analysts and consultants trying to gain insight into non-crop pesticide market in China

Associations paying attention to non-crop pesticide industry and market in China

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