



中国国际贸易促进委员会化工行业分会
中国国际商会化工行业商会

CCPIT Sub-Council of Chemical Industry
CCOIC Chemical Industry Chamber of Commerce

China Pesticides Manufacturing Capability

Current and Future



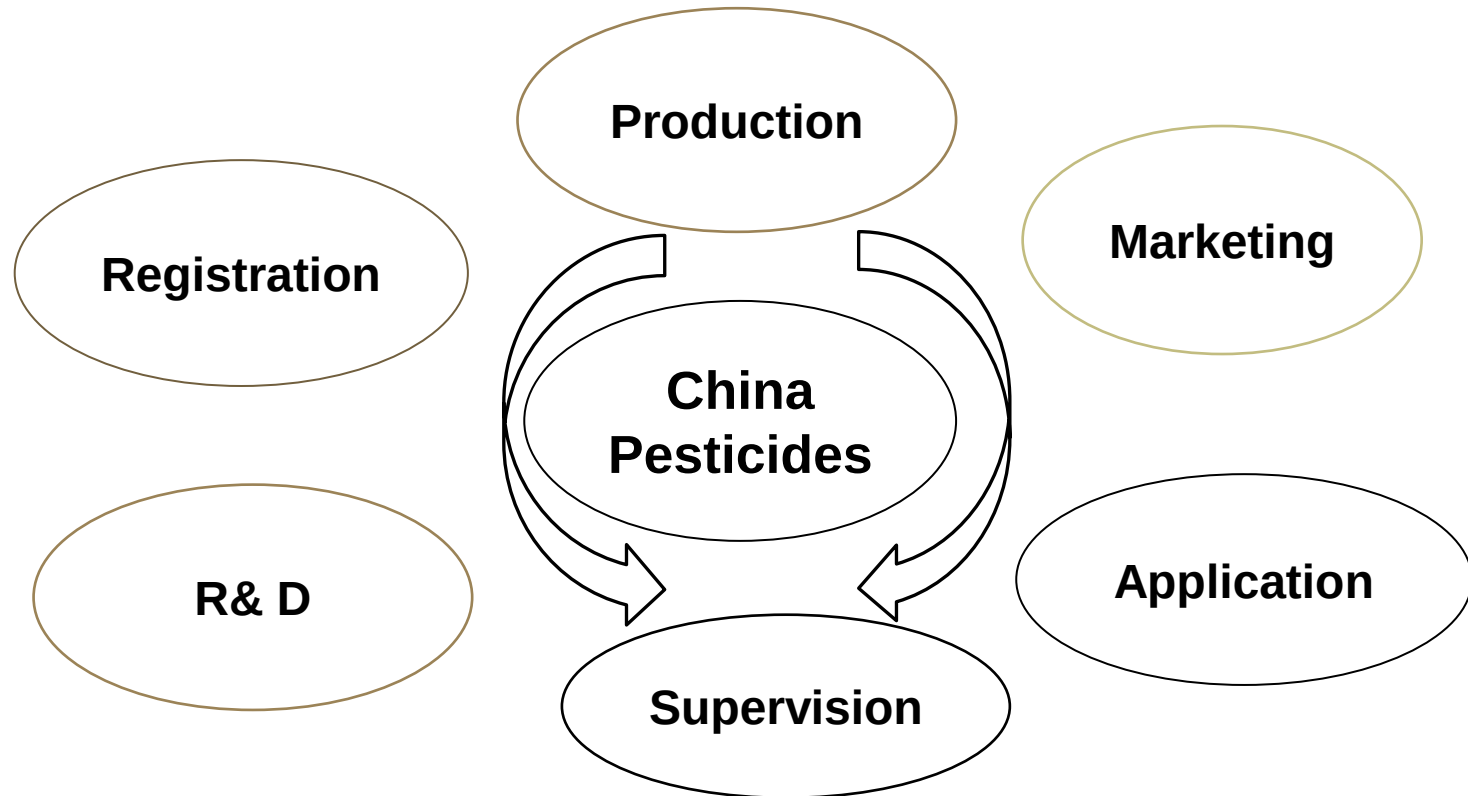
Mr. Liqiang Fan

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China Pesticides Industry System

- Have stepped into the legal road
-



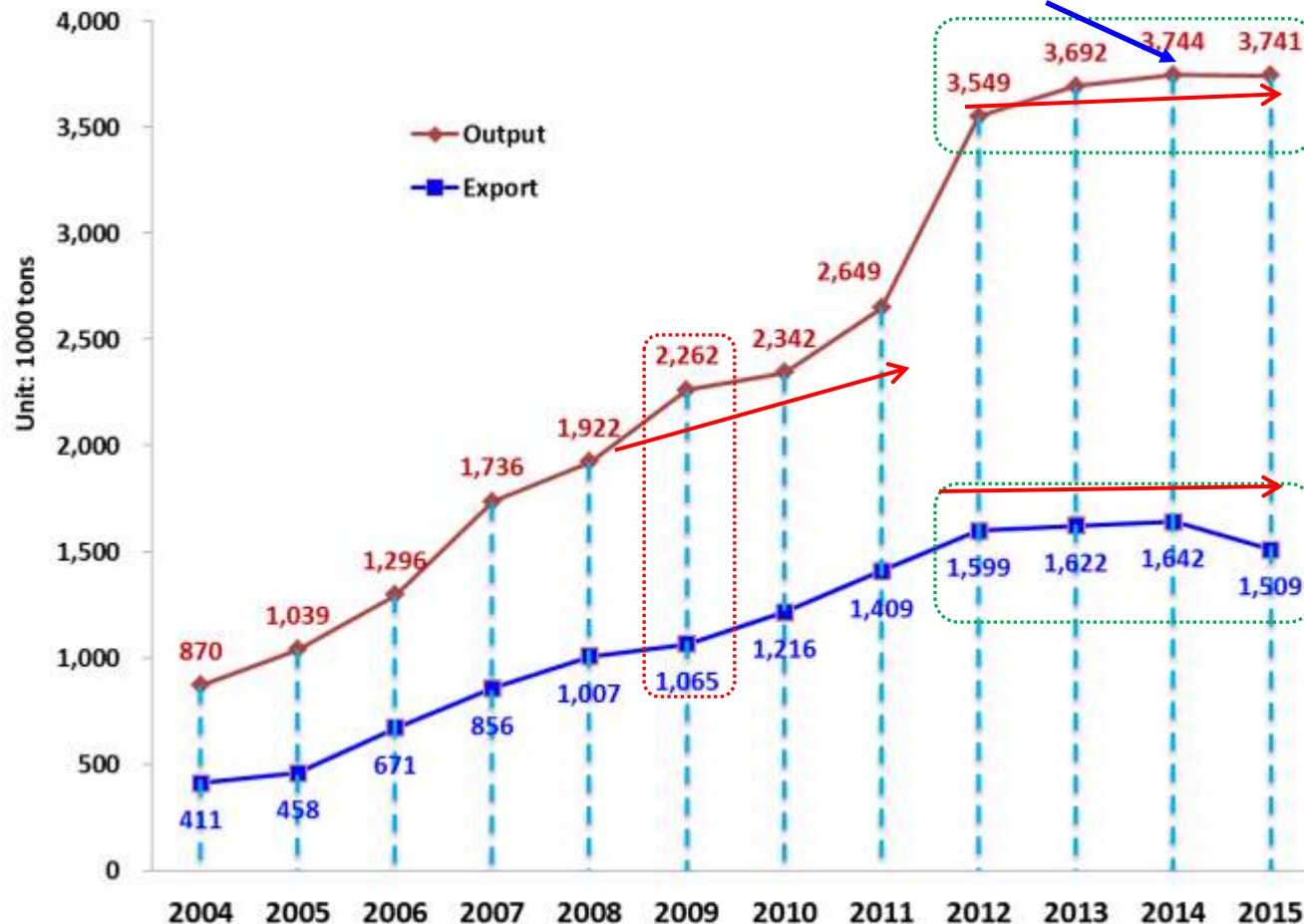
- More than 20 departments relate to pesticides

China Pesticides Industry-Registration

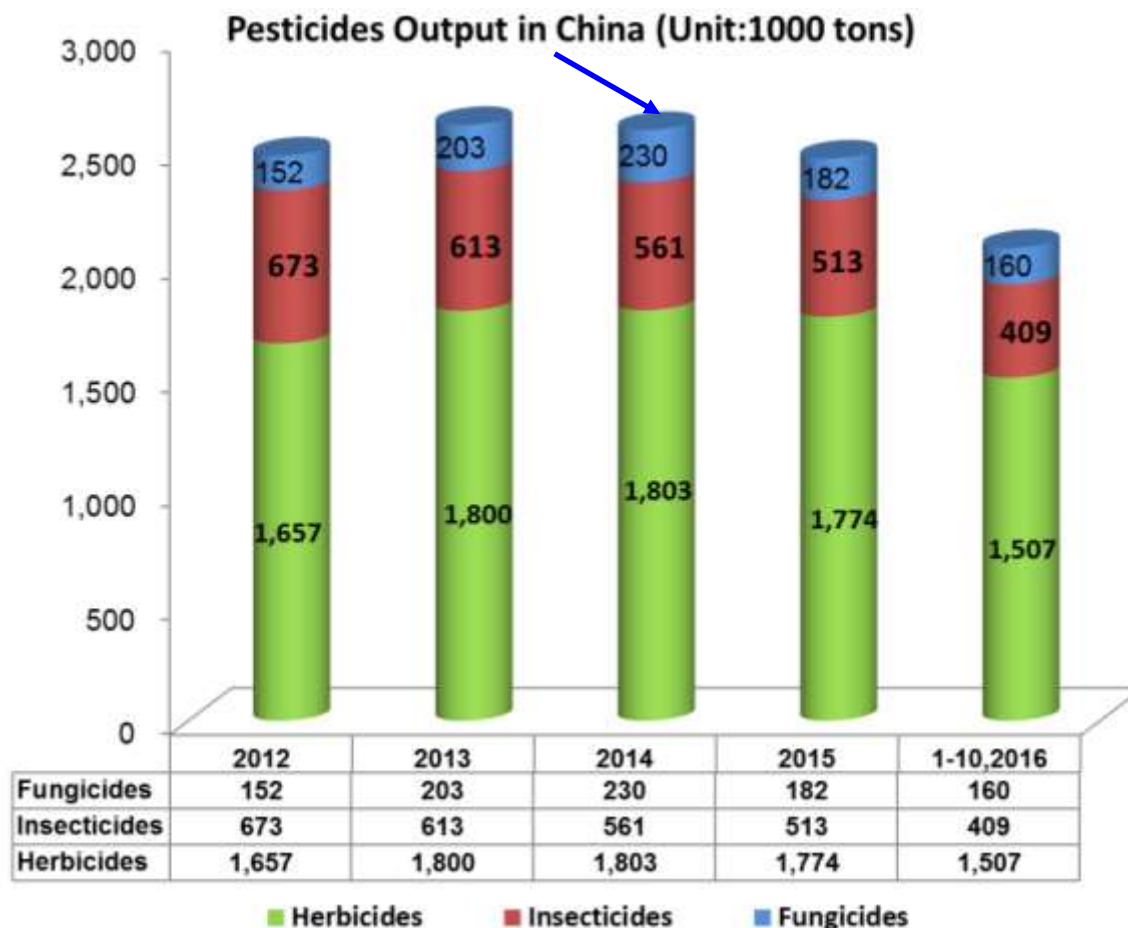
- Registrant of pesticides: 2,100+ (**105** foreign companies)
- Technical materials registrant : 675
- Formulation registrant: 2,000+
- Registration approved: 34,000+
- Active ingredients: 600+
- Public company: 44
- <http://www.chinapesticide.gov.cn/sjzx4ywb/index.jhtml>



Production and export of pesticides in China



Production of pesticides in China

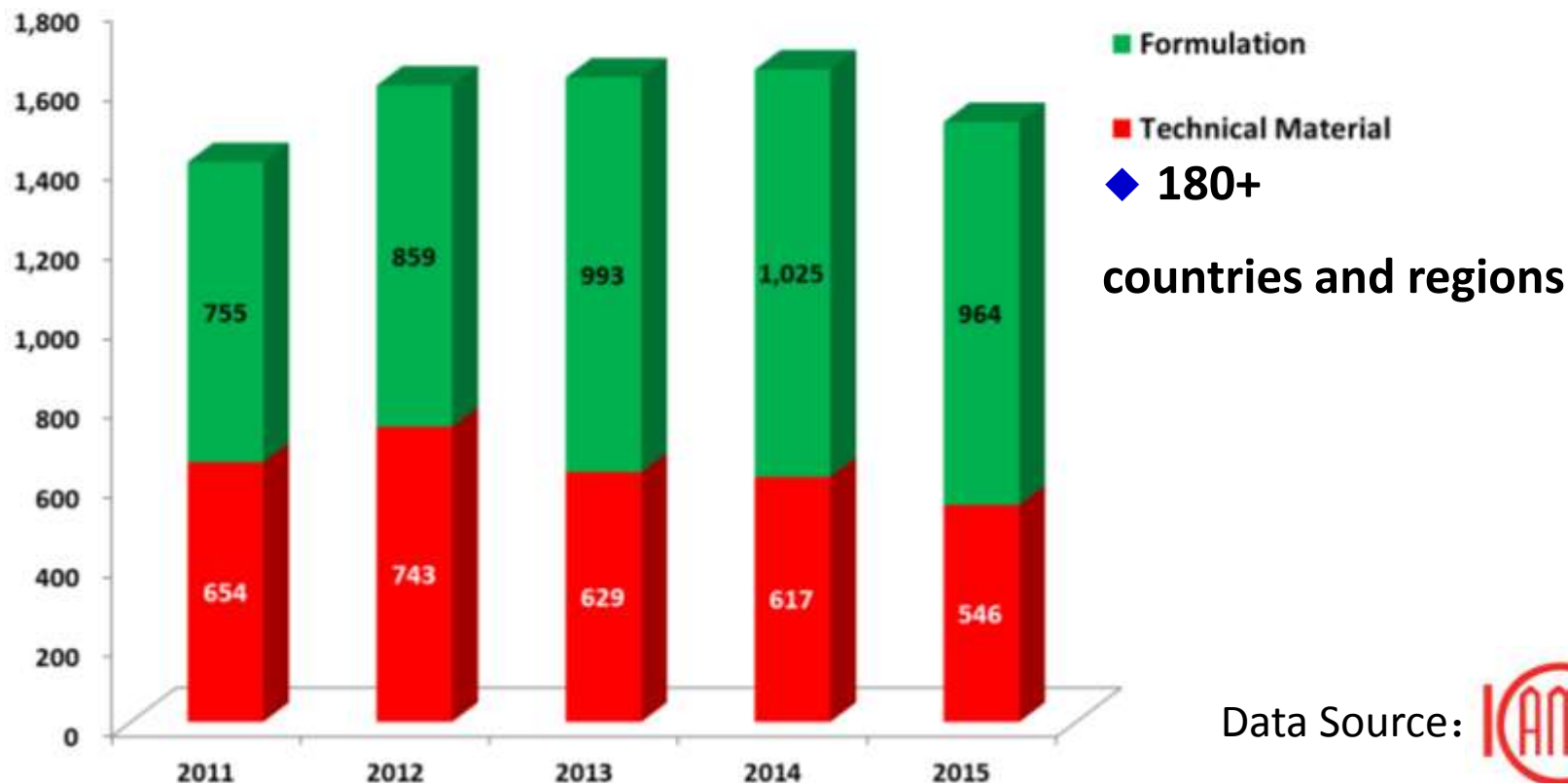


Data Source:



China Pesticides Industry-Export

Pesticides exported from China in 2015 (Unit: 1000 tons)



Product exported from China in 2015

- More than 400 A.I. exported
- Quantity and Price both felled
- Technical Material Export

Year	Quantity (1,000 tons)	Growth	Amount (Million USD)	Growth
2011	654		3,919	
2012	742.6	13.55%	5,121	30.66%
2013	629.3	-15.26%	5,082	-0.75%
2014	616.8	-1.98%	5,028	-1.06%
2015	545.6	-11.54%	4,261	-15.27%

Data Source:



Product exported from China in 2015

➤ Formulation Export

Year	Quantity (1,000 tons)	Growth	Amount (Million USD)	Growth
2011	754.8		2,280	
2012	856.8	13.52%	2,742	20.30%
2013	992.7	15.86%	3,441	25.47%
2014	1,024.9	3.25%	3,732	8.46%
2015	963.8	-5.96%	3,022	-19.02%

Data Source: 

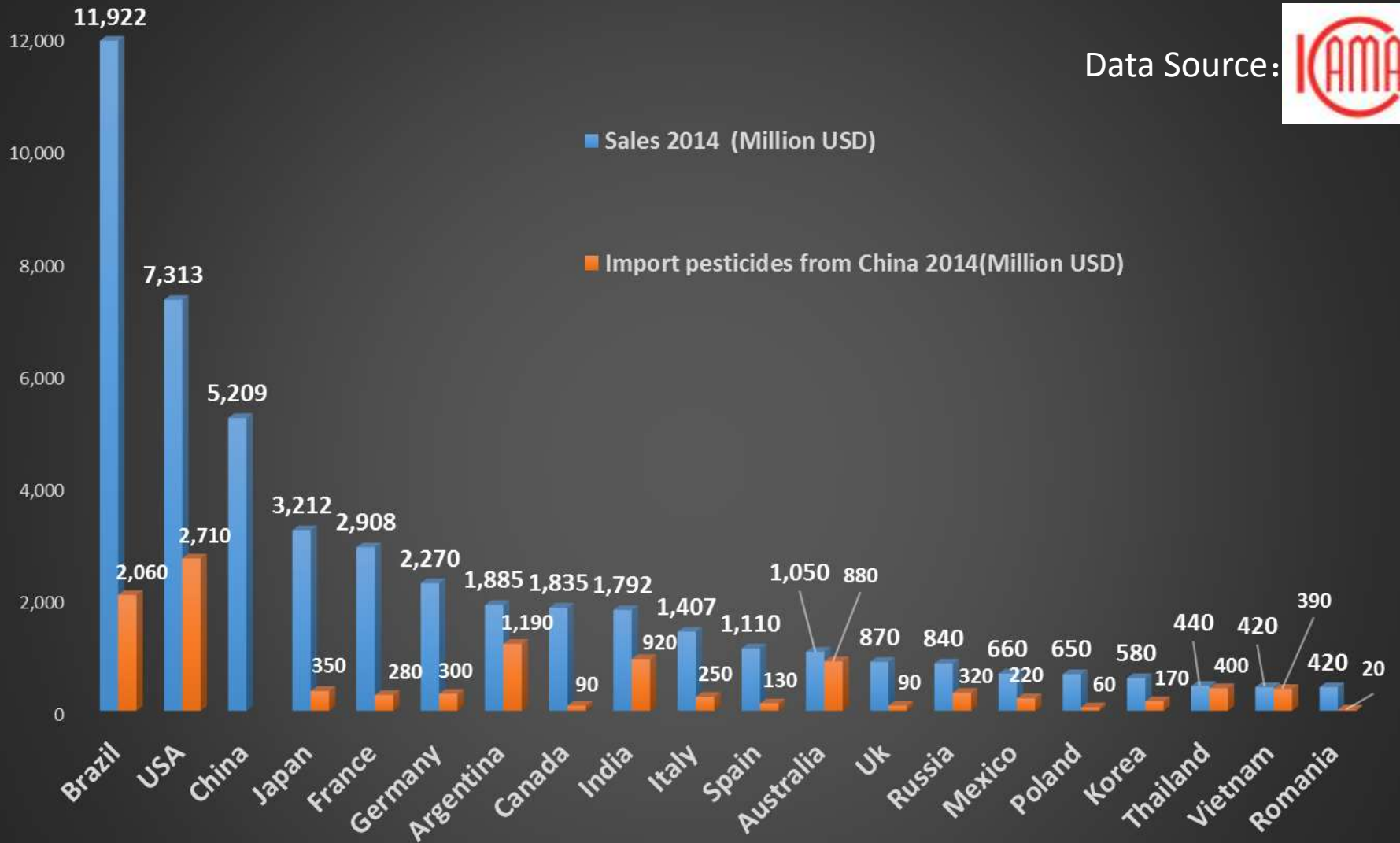
Product exported from China in 2015

➤ Top 10 active ingredient exported from China

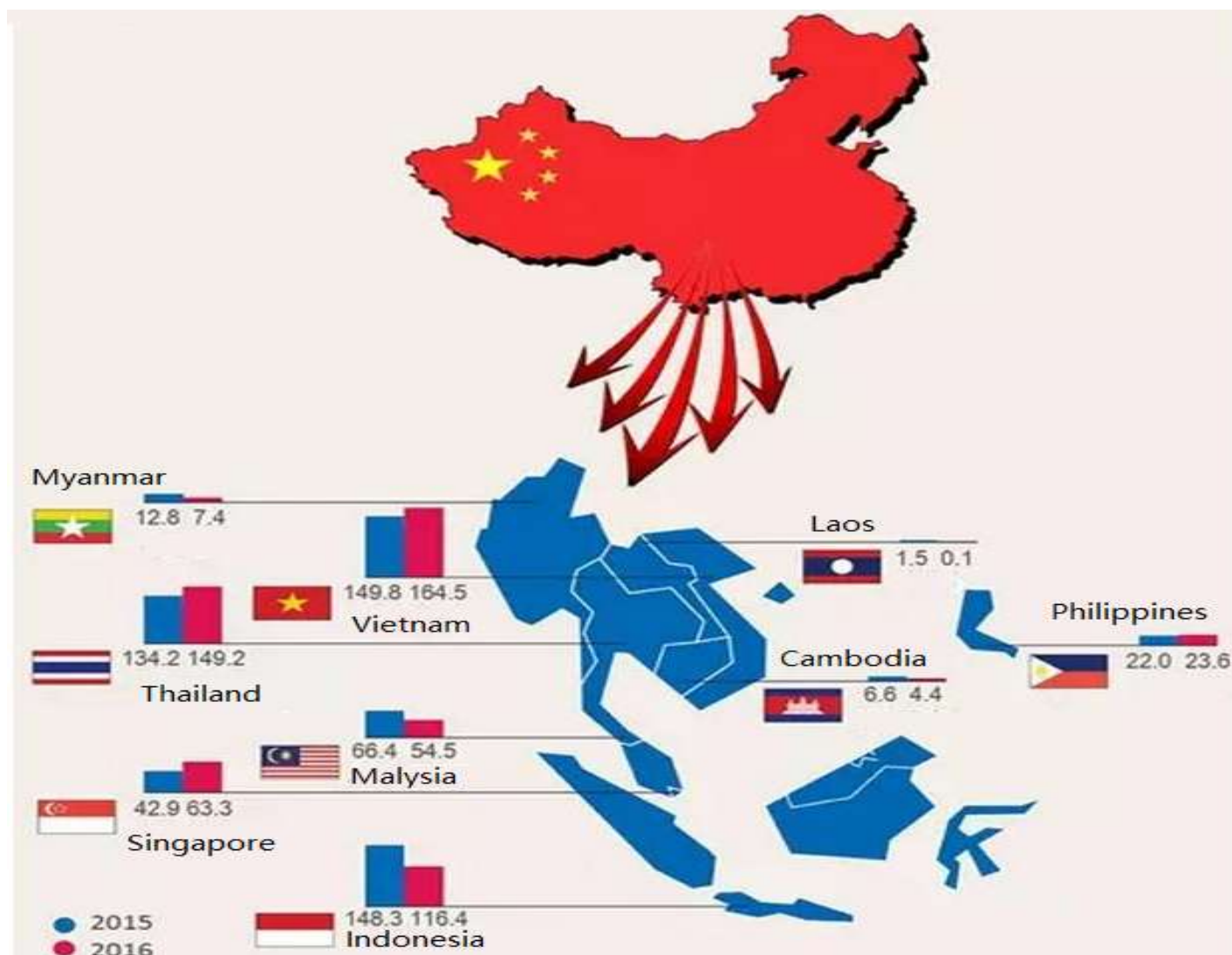
No.	Product	Registration	Quantity (1,000 tons)	Growth	Amount (Million USD)	Growth
1	Glyphosate	1,079	526.4	-14.53%	1,273	-39.24%
2	Paraquat	52	181.4	22.75%	443	-15.79%
3	Imidacloprid	1,290	21.7	-7.86%	224	-29.34%
4	Clethodim	133	16.8	52.42%	144	47.07%
5	Chlopyrifos	1,06	27.2	-24.71%	133	-27.47%
6	Atrazine	773	4.08	-14.95%	120	-30.49%
7	Dicamba	74	7.5	16.51%	117	5.55%
8	Abamectin	2492	10.4	8.18%	109	49.15%
9	Sulfentrazone	8	4.0	11.98%	106	9.46%
10	Chlorothalonil	276	24.6	13.45%	100	19.38%
Total		6,282	860.8		2,769	

Top 20 countries import pesticides from China 2014

Data Source:



Main South-east Asian countries import pesticides from China from Jan. to June ,2016(Million USD)



Data Source:

Main pesticides exported into South-east Asia from Jan. to June ,2016 (Million USD)

Pesticides	Jan.-June,2015	Jan.-June,2016	Change Rate
Glyphosate	143.4	123.5	-13.87%
Paraquat	85.3	70.63	-17.20%
Chlopyrifos	25	19.58	-21.68%
Chlorantraniliprole	27.87	16.34	-41.37%
Imidacloprid	8.4	14.37	71.07%
Abamectin	12.24	12.48	1.96%
Mancozeb	4.77	11.13	133.33%
Carbendazim	7.12	9.85	38.34%
Tricyclazole	15.94	9.73	-38.96%
Atrazine	8.86	9.03	1.92%
Fipronil	8.17	8.7	6.49%
Ametryn	11.63	8.44	-27.43%
Es-Bioallethrin	2.34	6.99	198.72%
Emamectin benzoate	6.72	6.79	1.04%
Azoxystrobin	5.02	6.5	29.48%
Difenoconazole	5.45	6.46	18.53%
Glufosinate	8.31	6.06	-27.08%
Profenofos	4.79	6.04	26.10%

Hot topic 2016 in China Agriculture

➤ Internet Age--Intelligent Agriculture



Hot topic 2016 in China Agriculture

➤ Aerial Pesticide Application

- 500+ Enterprises
- Need 100,000 Smart Aircrafts
- Formulation? ?



Hot topic 2016 in China Agriculture

➤ Internet Age



Hot topic 2016 in China Agriculture

- Internet Plus in Crop Protection
 - Innovation revolution
 - E- Business(B to C)



Hot topic 2016 in China Agriculture

➤ Internet Plus in Crop Protection



Hot topic 2016 in China Agriculture

➤ Internet Plus in Crop protection

 东盟易购

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东盟国家馆:

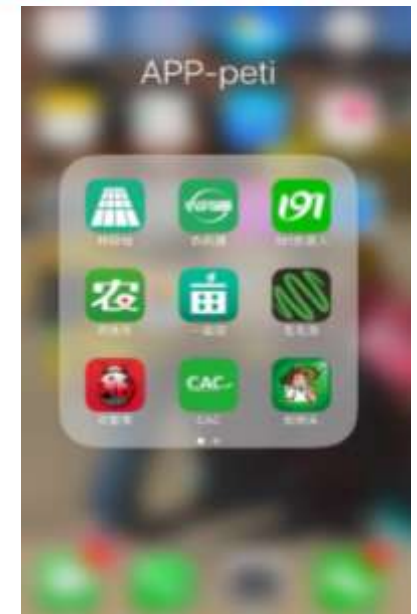


中国—东盟跨境电商平台
CHINA-ASEAN E-COMMERCE PLATFORM



Hot topic 2016 in China Agriculture

➤ Planting Technology & Crop Protection Service



Trend of China Pesticides Industry

- Environment protection: more and more strict, supervision
- New generic product: Prothioconazole, Penoxsulam (20) ,
Dinotefuran (31) , Pyraclostrobin (181) ,Thiamethoxam (323) ,
Azoxystrobin (462)
- Production: won't add the amount of producer -1163 (MIIT)
- Risk Assessment or forbidden: Glyphosate, Neonicotine,
Chlopyrifos, Paraquat
- Zero growth in pesticides application amount by 2020
Pesticides application effective from 35% to 40 %



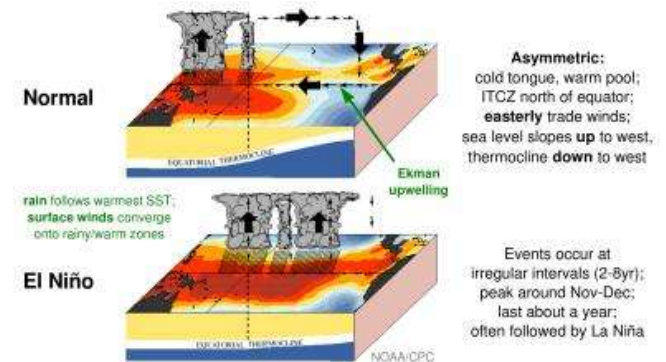
Trend of China Pesticides Industry

- 13th five-year plan
- Supply-side reform policies : go to capacity, to inventory, to leverage, reduce costs, make short board
- New pesticides management regulatory in 2016
- The petrochemical industry Plan Action 2016-2018
- The planting structure adjustment plan 2016-2020



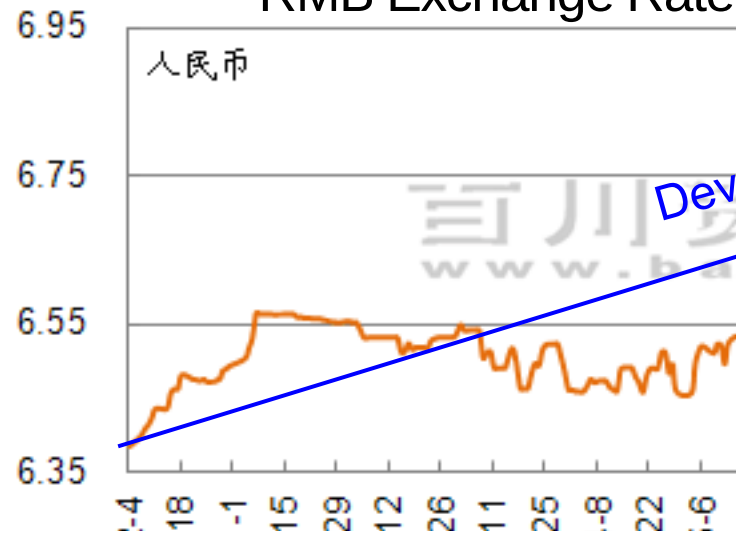
Key factors affecting the production & export

- Price of agricultural product
- Supply & Market Demand
- Policy- Tax
- Economic
- Environment supervision
- Weather-Climate: El Nino ,La Nina, drought, rain storm.etc
- Raw material: **Glycine**,Liquid caustic soda, Triphen, Bromine, Hydroxytropone, **Hydrazine hydrate**
- Intermediate: Triazole, 3-cyanopyridine
- Exchange rate



Key factors affecting the production & export

RMB Exchange Rate



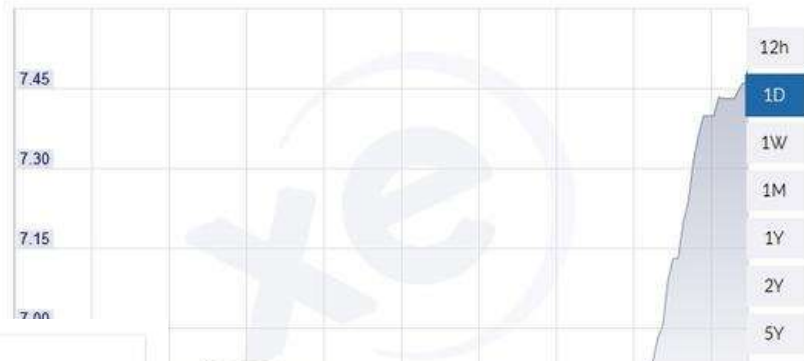
XE Currency Charts: USD to CNY

US Dollar to Chinese Yuan Renminbi Chart

This USD/CNY Chart lets you see this pair's currency rate history for up to 10 years! XE uses highly accurate, live mid-market rates.

USD to CNY Chart

Dec 2016 20:40 UTC - 5 Dec 2016 20:46 UTC USD/CNY close 7.48187 low 6.86315 high 7.48187



What's Next?

Send a Cheap XE Money Transfer.

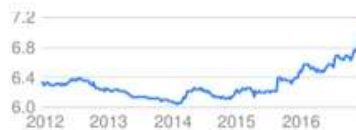
[Click Here!](#)

1 US Dollar equals

7.43 Chinese Yuan

1 US Dollar

7.43 Chinese Yuan



Disclaimer



Donald J. Trump @realDonaldTrump · Dec 4
their country (the U.S. doesn't tax them) or to build a massive military complex in the middle of the South China Sea? I don't think so!

10K 13K 44K



Donald J. Trump @realDonaldTrump · Dec 4
Did China ask us if it was OK to devalue their currency (making it hard for our companies to compete), heavily tax our products going into...

9.2K 18K 57K

Key factors affecting the production & export

➤ Environmental supervision tighten

- Result of 1stSupervision: 8 provinces,8, punish 3,422 persons, verbal warning 2,176 persons , fine 198 million RMB
- 2nd Supervision: started until Dec. in 8 provinces (Beijing, Shanghai, Guangdong, Chongqing, Hubei, Gansu, Shaanxi)
- Limit the production: Beijing, [Hebei\(3\)](#), Shanxi, [Shandong\(2\)](#), Henan, [Sichuan](#)



New Opportunity

Bio-stimulant

Seed Treatment

Soil Conditioner



Resistance Management

Bio-control Technology



New Opportunity

➤ Resistance management



New Opportunity

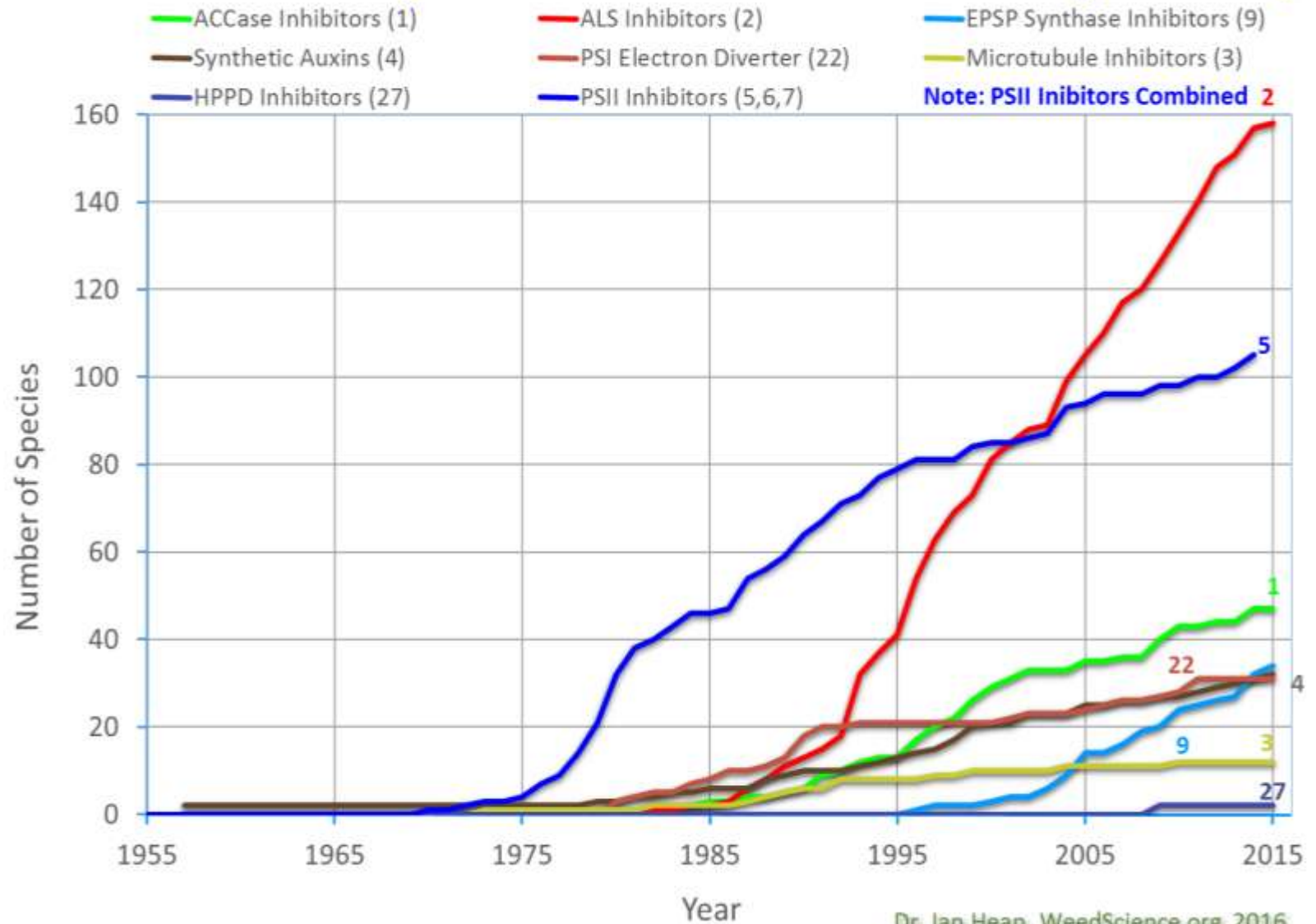
➤ Resistance Management

International Survey of Herbicide Resistant Weeds

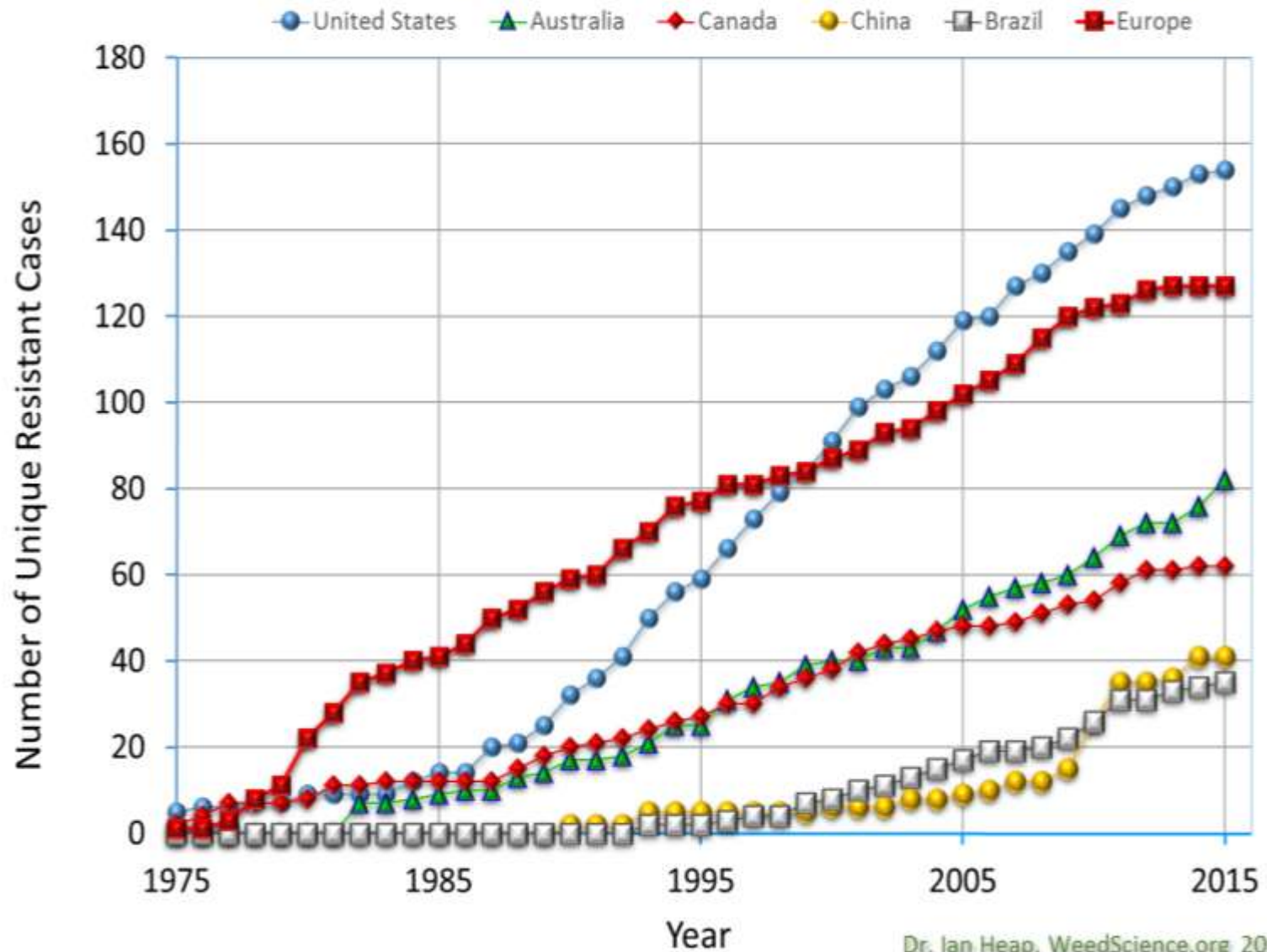
Saturday, July 30, 2016

There are currently **471 unique cases** (species x site of action) of herbicide resistant weeds globally, with **250 species** (145 dicots and 105 monocots). Weeds have evolved resistance to **23 of the 26 known herbicide sites of action and to 160 different herbicides**. Herbicide resistant weeds have been reported in **86 crops in 66 countries**. <http://weedscience.org>

Number of Resistant Species for Several Herbicide Sites of Action (WSSA Codes)



Increase in Unique Resistant Cases for Selected Countries and Europe



New Opportunity

➤ Resistance management

- New A.I. to kill resistant weed
- Mixture formulation to delay resistant and kill weed
- Biocontrol
- Professional in resistance management



New Opportunity

➤ Bio-stimulant

- Plant biostimulants contain substance(s) and/or micro-organisms whose function when applied to plants or the rhizosphere is to stimulate natural processes to enhance/benefit nutrient uptake, nutrient efficiency, tolerance to abiotic stress, and crop quality
- Biostimulants have **no direct** action against pests, and therefore do not fall within the regulatory framework of pesticides
- 2,524.02 million USD in 2019, growing 12.5% / year

New Opportunity

➤ Bio-stimulant

- The European Biostimulant Industry Council (EBIC) was founded in June 2011 as the European Biostimulant Industry Consortium and changed its name when it gained legal identity in 2013.
- China Biostimulants Development Alliance (CBDA) was founded in Dec.02,2016



中国生物刺激剂发展联盟
CHINA BIOSTIMULANTS
DEVELOPMENT ALLIANCE





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New Opportunity

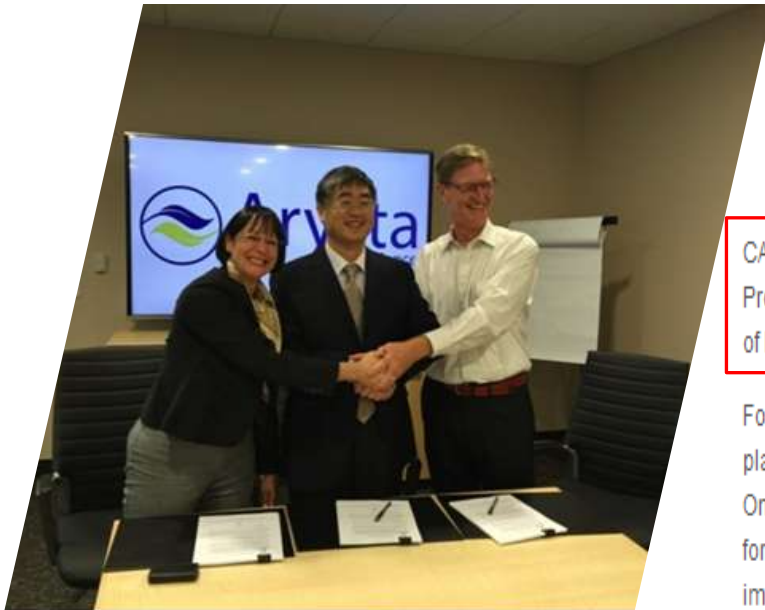
➤ Bio pesticides-Activator P



中国农业科学院植物保护研究所

Institute of Plant Protection(IPP),Chinese Academy of Agricultural Sciences(CAAS)

● IPP-CAAS+ Arysta--- Activator Protein



CAAS副所长代表中国农业科学院植物保护研究所与美国爱利思达公司
经理 Paula 女士、首席技术官 Georges 先生共同签订合作协议

ARYSTA LIFESCIENCE LICENSES PROPRIETARY IMMUNOPROTEIN BIOPESTICIDES FROM IPP

CARY, N.C. (March 9, 2016) - Arysta LifeScience recently signed a licensing agreement with the Institute of Plant Protection (IPP) granting Arysta LifeScience exclusive global access (excluding China) to certain protein technologies of IPP, one of which already has been successfully commercialized in China.

For more than 10 years, IPP, part of the Chinese Academy of Agricultural Science (CAAS), has been developing a platform for selecting, identifying, quantifying and patenting plant immunity inducers derived from fungal pathogens. One of these technologies is a protein from *Alternaria tenuissima* and identified as PeaT1. In June 2014, IPP formulated PeaT1 into an end-use product registered in China with ICAMA and launched it as the first plant immunoprotein biopesticide. In its first full year on the market, the product (marketed under the brand Atiling) generated sales in excess of US \$10 million.

New Opportunity

➤ Biocontrol Technology-enterprises, R &D



New Opportunity

➤ Seed Treatment Technology

- The sales of seed treatment agents in China in 2015 reached RMB 2.86 billion, up by 16.7% over the sales in 2014, will exceed RMB 5 billion by 2019.
- The global market value of seed treatment agents will reach 4.19 billion dollars by 2018



New Opportunity

➤ Soil Conditioner

- 130 million hectares cultivated land in China
- 19.4% polluted
- 15 billion USD spent in soil conditioner every year in China
- More than 150 billion of the whole soil conditioner market in China



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2017中国国际农化会议周

China International Agrochemical Conference Week 2017

2017年2月28-3月2日 28 Feb-2 Mar. 2017

中国·上海 www.cac-conference.com

Program of CACW 2017

Topic	Date & Venue
11th China International Forum on Development of Pesticide Industry	Date: Feb. 28 Venue: Shanghai Jumeirah Himalayas Hotel
7th Beyond-Agriculture Seminar	Date: March 1 Venue: Shanghai New International Expo Centre
3rd International Seminar on Seed Treatment Technology	Date: March 1 Venue : Shanghai New International Expo Centre
6th China International Forum on Development of Bio-Control Technology	Date: March 2 Venue: Shanghai New International Expo Centre
9th World Academic Meeting for the Development of Pesticide Technologies & Applications	Date: March 2 Venue: Shanghai Jumeirah Himalayas Hotel

**Thanks for
your attention**