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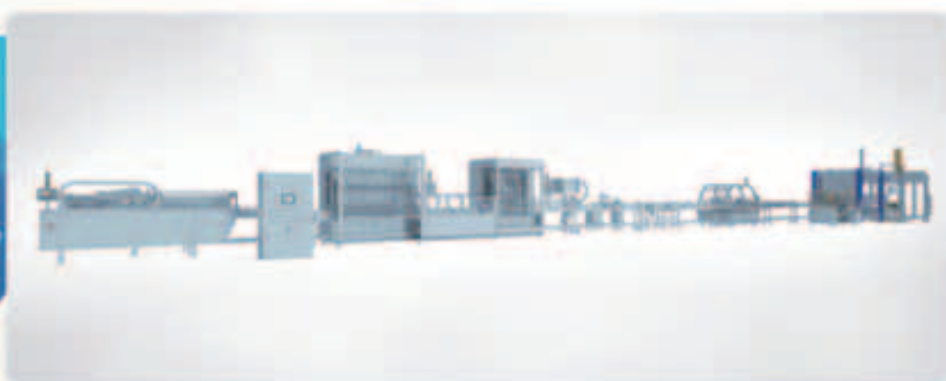
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# CHINA AGROCHEMICALS



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In the first half of 2016, despite many adverse factors such as that macro economy slowed down, the RMB continued to devalue, international purchase was cautious and took a wait-and-see attitude, the prices of agricultural products went down and the market competition was fierce, China basically met expectations in agrochemical production, export and other economic indicators and met the needs for agricultural production.

## Summary and analysis of the Chinese agrochemical industry and market in H1 2016

Yang Yijun

### I Slight growth in revenue and profit and clear differentiation in sub-sectors in agrochemical industry

According to the data of the National Bureau of Statistics, in the first half of 2016, the revenue of the Chinese agrochemical industry was 163.029 billion yuan, up 5.4% year on year, and the total profit was 11.428 billion yuan, up 4.7% year on year. In terms of the development of the industrial structure, biochemical pesticides and microbial pesticides maintained a two-digit growth in revenue and profit, playing a major role in stabilizing the whole agrochemical industry. The operating revenue and profit of biochemical pesticides and microbial pesticides increased by 14.3% and 27.4% year on year respectively, a growth much larger than that of chemical technical.

### II The supply of the three major categories of pesticides fluctuated slightly and the overall pesticide supply increased slightly

Affected by weak domestic and foreign demand, high inventories, environmental protection supervision and internal industry consolidation, the yield and supply of chemical technical in China continued to show a slow growth trend. According to the statistics of the National Bureau of Statistics, the accumulative pesticide output in China from January to June, 2016 was 1.8842 million tons, up 4.3% year on year. The output of both herbicides and fungicides increased, while that of insecticides continued to drop. Specifically, the output of herbicides was 938,500 tons, up 6.5% year on year, accounting for 49.80% of the total pesticide output, a proportion about the same as that in the corresponding period last year; the output of fungicides was 99,800 tons, up 6.74% year on year, accounting for 5.30% of the total pesticide output, a proportion also about the same as that in the corresponding period last year; the output of insecticides was 228,900 tons, down 7.96% year on year, accounting

for 12.15% of the total pesticide output, a decrease from that in the corresponding period last year (See Table 1 for detailed data).

Table 1: National pesticide output from January to June 2016 (100%) (10,000 tons, %)

Name	Accumulative output from January to June	Accumulative total last year	±% year on year
Chemical pesticide technical	188.42	180.61	4.32
Insecticide technical	22.89	24.86	-7.96
Fungicide technical	9.98	9.35	6.74
Herbicide technical	93.85	88.10	6.52

Source: National Bureau of Statistics

### III Overview and forecast of China pesticide trade

#### 1. Overall import & export trade

According to the statistics of the General Administration of Customs of PRC, the total import & export volume during Jan. to June 2016 reached 789 thousand tons, of which export volume was 735 thousand tons, an increase of 6.3%YoY, and exports amounted to USD 1.96 billion, down by 5.9% YoY. Among them, the insecticide import volume reached 127 thousand tons, up 11.3% YoY, exports amounted to USD 452 million, a decrease of 1% YoY; the fungicide exports volume reached 51,000tons, up 20.4% YoY, while exports value amounted to 250 million US dollars, up 8.5% YoY; the herbicide exports volume reached 531,000 tons, up 10.5% YoY, while exports value amounted to 1.197 billion US dollars, drop 10.5% YoY. During Jan.-June 2016, the pesticide import total volume

reached 54,000 tons, an increase of 4.4% YoY, and import value reached 483 million US dollars, a decrease of 1.9%. The insecticide import total volume reached a total of 7,000 tons, an increase of 13.1% YoY, and imports amounted to 108 million US dollars, up by 21.7% YoY; the fungicide imports volume reached 18,000 tons, up 9.4% YoY, while imports value amounted to 174 million US dollars, down 3.8% YoY; the herbicide imports volume reached 15,000 tons, down 10.5% YoY, while imports value amounted to 89 million US dollars, drop 19.1% YoY.



*Table 2: Jan.-June 2016 Import & Export Statistics Data by category  
(\$10thousand, 10,000 tons, %)*

Imp&exp	Category	Pesticide	Insecticide	Fungicide	Herbicide	PIC	other
Imp	Volume	5.4	0.7	1.8	1.5	0	1.4
	Value	43772	10822	17392	8922	0	6635
YoY ±%	Volume	4.4	13.1	9.4	-3.3	—	3.7
	Value	-1.9	21.7	-3.8	-19.1	—	-0.1
Exp	Volume	73.5	12.7	5.1	53.1	0.3	2.3
	Value	196011	45248	25179	119684	193	5708
Yoy ±%	Volume	6.3	11.3	20.4	4.1	-24.1	9
	Value	-5.9	-1	8.5	-10.5	-28.8	5.8

ASEAN, Latin America and Africa are main export destination of China pesticide, the total export of three areas accounted for 65.86% of the total (see the following table 3), while ASEAN and EU are still main import areas for China pesticide, which both of two areas accounted for 62.48% of total imports in China.

The total import & export value during Jan.-June 2016 reached USD2.398 billion, drop by 5.2% year-on-year; in which the total trade value of insecticide was USD 561 million, up 5.2% YoY, the total trade value of fungicide was 426 million, an increase of 3.1% YoY, the total trade value of herbicide was USD1.286 billion, drop by 11.2%. In the half of this year, the trade of herbicide, fungicide and insecticide account for 53.63%,17.76% and 23.40% of China pesticide trade respectively (see the following

## 2.The differentiation of three pesticide category trade

*Table 3: Jan.-June 2016 Import & Export Statistics Data on the basis of country  
(\$10thousand, 10,000 tons, %)*

Region	Cumulative imports from Jan.to June		YoY±%		Cumulative exports from Jan.to June		YoY±%	
	Volume	Value	Volume	Value	Volume	Value	Volume	Value
Global	54140.03	43771.79	4.45	-1.92	734506.31	196010.99	6.33	-5.91
China Hongkong	1071.08	272.96	-4.21	-10.41	3971.85	680.5	2.01	-7.86
China Macao	0	0	—	—	101.13	30.82	-38.38	-31.23
Taiwan Province	743.94	537.15	-26.8	-49.02	7520.04	1391.41	-1.7	-29.37
ASEAN	19418.45	12702.16	10.24	1.06	171926.88	37079.29	-9.65	-22.73
Japan	1495.18	2221.79	8.73	-12.18	11226.11	2391.85	0.05	-21.31
Korea	4741.48	3864.78	-3.54	10.26	1895.45	677.67	-4.67	-3.52
India	4351.2	2284.35	42.09	-5.53	1608.67	608.34	20.09	-18.8
Pakistan	0	0	—	—	13968.24	4160.43	21.69	-7.25
Middle East	947.44	828	94.23	121.75	24107.06	7744.48	3.14	-11.83
EU	14445.33	12807.22	-2.89	-1.01	17779.15	6244.65	-11.36	-15.57
Russia	0	0	—	—	26934.57	8258.74	59.98	33.35
Ukraine	0.3	2.4	—	—	22648.15	7737.54	46.67	35.48
USA	2846.04	5210.85	-36.36	-21.49	29766.15	11103.61	20.07	6.61
Canada	69.04	54.71	352.93	158.93	6420.83	1143.94	234.44	184.38
Latin America	1948.93	1032.11	4.9	9.16	155677.85	46907.41	23.57	7.35
Africa	16.28	10.45	-76.94	-88.54	163451.68	38345.22	-5.57	-14.35
Australia	1320.16	754.09	426.07	303.97	50320.04	13523.17	38.85	11.58
New Zealand	99.24	109.42	-6.05	-16.55	2064.1	628.74	23.01	4.44
Other countries and regions	625.95	1079.36	4.81	17.08	23118.37	7353.19	-1	-13.76



table 4, the total proportion of herbicide saw reduction, while the insecticide and fungicide saw a slight rise.

*Table 4 Jan.- June 2016 Imp & Export Statistics Data (10,000 tons,\$10thousand,% )*

Category	From Jan.to June 2016	From Jan.to June 2015	YOY %
Pesticide	239783	252958	-5.2
Insecticide	56070	54597	2.7
Fungicide	42571	41277	3.1
Herbicide	128606	144781	-11.2

#### IV. Pesticide demand analysis and prediction in the second half of 2016

It's unlikely that both quantity and price of the Chinese pesticide market will increase in the second half of the year. The pesticide demand is expected to be weak. There are mainly three reasons. First, global agricultural product prices haven't reached the bottom yet. Agricultural product prices remain low, which has affected pesticide demand and greatly reduced Chinese farmers' investment enthusiasm in pesticide products. Meanwhile, flood disasters have disrupted reseeding plan in the farming season and also aggravated dealers' wait-and-see sentiment for stocking. The great uncertainty brought by a new round of preparation replenishment demand has seriously suppressed demand. Second, South America and Southeast Asia, which are the main pesticide export markets of China, currently have few orders. Third, in terms of cyclical economy, the economic operation of the pesticide industry is still in the downward slide.



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- Mancozeb 85% TC, 80 WP
- Tebuconazole 95% TC, 250g/L EW

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- Atrazine 95% TC, 80 WP
- Glyphosate 95% TC, 360g/L, 450g/L SL
- Oxadiazon 95% TC, 125g/L EC
- Paraquat 42% TC, 240g/L SL
- Permethrin 95% TC, 330g/L EC

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## The State Council: Actively promoting the “going out” of agrochemical industry

During the 12th Five-year Plan, the CAGRs of main business revenue, assets, investment and profits and taxes of the petroleum and chemical enterprises above the designated scale in China were 9.2% (higher than the 7.8% of the GDP in the corresponding period), 12.5%, 14.0% and 3.8% respectively, which were all led the industry. However, they were faced with problems such as excess production capacity, high unit product consumption, high pressure in going green and environmental protection, insufficient innovation and decline in enterprise profitability, requiring prompt improvement.

Recently the General Office of the State Council of the People's Republic of China issued Guiding Opinions on Adjusting Structure, Promoting Transformation and Increasing Profits of Petrochemical Industry (G.B.F.(2016) No. 57, hereinafter referred to as the Guiding Opinions). The general requirements specified in the Guiding Opinions include promoting structural reform on the supply side, improving development environment, concentrating efforts on dissolving excess capacity, lowering consumption and reducing emission, making up short slabs, adjusting layout, promoting safety and promoting quality and efficiency improvement, transformation and upgrading and healthy development in the petrochemical industry.

The major tasks of the Guiding Opinions are: to strive to dissolve excess capacity; to transform and improve traditional industries; to promote safety and green development; to improve innovation system; to promote enterprise merger and restructuring and strengthen international capacity cooperation. It is emphasized in the Guiding Opinions that it's necessary to give full play to the comparative strength of the traditional petrochemical industry in China, and based on the "Belt and Road" strategy, actively develop international capacity cooperation in competitive industries such as refinery, alkene, methyl alcohol, tyre, chemical fertilizer, dye, chlor-alkali and inorganic salt industries, establish overseas petrochemical industry parks, promote chain transfer and intensive development and promote the "going out" of relevant technical equipment and engineering services, and also encourage foreign investment to participate in the merger and restructuring of Chinese enterprises, support large Chinese petrochemical enterprises to carry out transnational operation and make risk response plans.



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About agrochemical show: [www.agrochemex.net](http://www.agrochemex.net)





## Sown area of the four major oil plants will be expanded by 2020

The National Development and Reform Commission of the People's Republic of China recently issued Notice on Printing and Distributing National Production and Development Planning of Major Oil Plants (2016-20) ("Notice") on its official website.

It's stated in the Notice that it's necessary to expand the sown area of major oil plants and steadily improve per unit area yield. Aim to increase the sown area of the four major oil plants, which are rapeseed, peanut, soybean and camellia seed, to about 400 million mu and the total yield to 59.8 million tons by 2020, an increase of 62.42 million mu and 14.4 million tons from 2014 respectively.

### Goal of Development in major oil plants

Goal	2014	2020	increment in 2020 than 2014
<b>1. Area (10,000mu)</b>			
rapeseed	11382	12000	618
peanut	6906	7200	294
soybean	10200	14000	3800
camellia seed	5470	7000	1530
Total	33958	40200	6242
<b>2. Output</b>			
rapeseed	1477	1620	143
peanut	1648	1870	222
soybean	1215	1890	675
camellia seed	200	600	400
Total	4540	5980	1440
<b>3.yield of per unit area(Kg/Mu)</b>			
rapeseed	130	135	5
peanut	239	260	21
soybean	119	135	16
camellia seed	36	86	50
<b>4.Oil content</b>			
rapeseed	41%	43%	2%
peanut	50%	52%	2%
soybean	19.50%	21%	1.50%
camellia seed	25%	27%	2%

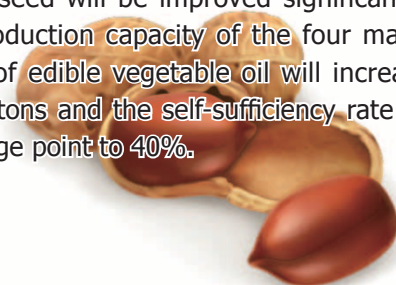
The sown area of soybean will be recovered to 140 million mu and the total yield to 18.9 million tons by 2020, an increase of 38 million mu and 6.75 million tons from 2014. The sown area will be mainly increased in the corn-soybean rotation areas in Northeast China and the soybean planting areas transformed from low-yield corn planting areas in the Huang-Huai-Hai region.

For rapeseed, the country will strive to achieve 120 million mu and 16.2 million tons in sown area and yield, an increase of 6.18 million mu and 1.43 million tons from 2014, and the sown area will be mainly increased in the rice-rape rotation area in the Yangtze River Basin.

For peanut, it will strive to achieve 72 million mu and 18.7 million tons in sown area and yield, an increase of 2.94 million mu and 2.22 million tons from 2014, and the sown area will be mainly increased in the corn-peanut rotation area in the Huang-Huai-Hai region and the agro-pastoral transition zone in Northeast China.

The sown area of camellia seed will be increased to 70 million mu and the yield to 6 million tons, an increase of 15 million mu and 4 million tons from 2014.

Meanwhile, it's indicated in the Notice that by 2020 the comprehensive mechanization rate of farming, seeding and harvesting of major oil plants of China will be improved to above 5 percentage point, of which the mechanical harvest level of rapeseed will be improved significantly. By improving the production capacity of the four major oil plants, the yield of edible vegetable oil will increase by about 2.3 million tons and the self-sufficiency rate by three to five percentage point to 40%.



# The Pyraclostrobin Market Trend in China

In the Chinese agrochemical market in 2016, pyraclostrobin is undoubtedly a hot spot in the fungicide sector. First, with the expiration of the patent of the product on June 20, 2015 and registration certificates being issued to domestic enterprises, product varieties have increased dramatically; second, BASF's a recent series of strategies and moves centering on pyraclostrobin has resurged, becoming a focus of the industry.

The pyraclostrobin market so far is astonishing. There hasn't been blowout release in production capacity or output in the industry. There are a lot of registered companies, but few of them actually start operation and manufacture and over 90% are waiting and seeing and testing the waters. The price plunge didn't come as expected. On the contrary, the price has surged from some 200,000 yuan a ton to over 350,000 yuan a ton.

According to analysis, in the global market, 70% of pyraclostrobin is sold in South America and only 3% is sold in Asia. The Chinese pyraclostrobin market is far from being developed, showing an immeasurable growth space for pyraclostrobin in future.

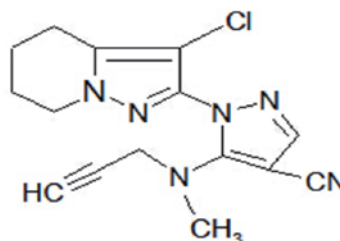
In terms of target markets, over 40% of the global market share of pyraclostrobin is used on dry field crops, and only 20% on fruit trees and vegetables. Therefore, the next growth area of the pyraclostrobin market is very clear.

Seen from the data on the application of fungicides in China, only 6% of the application amount of fungicides in the Chinese market is used in dry fields, while the proportion is nearly 40% in South America. Therefore, pyraclostrobin shows a great potential for use in dry fields. BASF has done a lot of demonstration and preparation work centering on corn, rice, wheat and peanut in the past two years. From the corn market it launched in 2015 to the rice market it is about to launch in 2016, it's clear that BASF has made a lot of efforts for its pyraclostrobin products.

## Pyraclonil to be registered in China for the first time

The Institute for the Control of Agrochemicals of the Ministry of Agriculture of the People's Republic of China recently released the list of the 8th batch of products approved for registration in 2016, of which 97% pyraclonil technical and 2% pyraclonil GR from Hubei Sowa Fine Chemical Co., Ltd. will be registered for the first time in China. According to inquiry results, it is also the first time that pyraclonil will be ever registered in China. The preparation is registered for broadcasting use in transplanted rice fields to control annual weeds and the dosage of the active ingredient is 162-216 g/hm<sup>2</sup>.

The chemical formula of the pyraclonilis as follows:



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Prodiamine	Cyhalofop-butyl	
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## Registration of boscalid, a new-type nicotinamide fungicide in China

After the administrative protection of boscalid, a new-type nicotinamide fungicide in China expired on November 9, 2012, boscalid has gradually become a hot spot in China. So far 20 products have obtained official boscalid registration, nine products temporary registration and three products repacking registration. Most of the registered products are in the form of WG (7), SC (6) and TC (15). See Table 1~3 below for details on the registered products.

Moreover, according to the approved field efficacy test applications from enterprises, the number of boscalid registration certificates is expected to continue to increase. As of August 15, 2016, the Ministry of Agriculture has approved at least 30 field efficacy test applications containing boscalid. The number of field efficacy test approval certificates has increased every year since 2011.

*Table 1: The registration of Boscalid TC*

Registration No.	Registration Name	Content	Manufacturer	Toxicity
PD20160770	Boscalid TC	96%	Jiangsu Yangnong Chemical Group Co., Ltd	Low
PD20160609	Boscalid TC	98%	Rudong Zhongyi Chemical Co.,Ltd.	slight
PD20160120	Boscalid TC	98%	Chengdu Gold Agrochemical Co.,Ltd.	slight
PD20151880	Boscalid TC	98%	Zhejiang Bosst Cropscience Co., Ltd	Low
PD20151620	Boscalid TC	98%	Jingbo Agrochemicals Technology Co., Ltd	Low
PD20151550	Boscalid TC	97%	MAX (Rudong) Chemicals Co., Ltd.	slight
PD20151556	Boscalid TC	98%	NanTong Jiahe Chemicals Co., Ltd.	slight
PD20151201	Boscalid TC	98%	Wuxi Jiabao Pharmaceutical Co.,Ltd.	Low
PD20151193	Boscalid TC	96%	Shandong Weifang Rainbow Chemical Co., Ltd	Low
PD20150687	Boscalid TC	98%	Huaian Guori Chemical Co.,Ltd.	slight
PD20150328	Boscalid TC	97%	Shannxi Meibang Pesticide Co.,Ltd.	slight
PD20150053	Boscalid TC	96%	Zhejiang Heben Science&Technology Co.,Ltd.	Low
PD20142680	Boscalid TC	96%	Hebei Xing cypress pharmaceutical group Co., Ltd	Low
PD20142681	Boscalid TC	96%	Taizhou Bailly Chemical Co.,Ltd.	Low
PD20081107	Boscalid TC	96%	BASF Europ Co.,LTd.	Low

*Table 2: The registration of Boscalid WDG*

Registration No.	Registration Name	Crop	Manufacturer
PD20160547	Boscalid (50%) WDG	Cucumber Gray Mold	Shannxi Meibang Pesticide Co.,Ltd.
PD20151890	Boscalid (50%) WDG	Gray Mold of grape,strawberry and tomato	Hangzhou Yulong Chemical Co., Ltd.
PD20150978	Boscalid (50%) WDG	Gray Mold of strawberry and grap	Jiangyin Suli Fine Chemical Co., Ltd
PD20081106	Boscalid (50%) WDG	Cucumber Gray Mold, Rape sclerotinia, tomato Gray Mold, Early blight,Strawberry Gray Mold,Grape Gray Mold,arly blight of potato.	BASF Europ Co.,LTd.
LS20160095	Boscalid (40%) WDG raclostrobinWDG(26.7%+13.3%)	Powdery mildew of cucumber	Shannxi Weierqi Crop Protection Co.,Ltd.
LS20140367	Boscalid (38%) WDG PyraclostrobinWDG(12.8%+25.2%)	Gray Mold of strawberry and grap,leaf spot of banana	BASF Europ Co.,LTd.

## **The Chinese rice seed coating agent market is expected to grow rapidly**

Seed coating agents, which start to protect crops from their seeds, can effectively prevent plant diseases and insect pests in the seedling stage. As early as in the 20th century, the United States brought up the idea and technology of seed coating agents, which were soon commercialized in the European and American markets. In 2012 the global sales volume of seed coating agents was US\$2.287 billion and it is still growing at an annual growth rate of over 10%. Seed coating agents started relatively late in the Chinese market. It was not till the middle 1970s that they saw rapid development in China. So far the main crops using seed coating agents in China include: soybean, wheat, corn, cotton, potato and rice.

According to relevant data, over 40% of the registered crops with seed coating agents in the Chinese market are corn and about 27% are wheat, and cotton accounts for about 17% and rice, only about 11%. Obviously, the R&D and development of rice seed coating agents are

relatively weak.

In terms of active ingredient, the fungicides registered for use as rice seed coating agents mainly include: prochloraz, hymexazol, fludioxonil, carbendazim and thiram. The varieties are limited, which are mainly used to control bakanae disease and blight, and there are few other varieties used to control other diseases. In terms of insecticides, there are only neonicotine insecticides such as imidacloprid and thiamethoxam, which are mainly used to control thrips.

By comparing the development trend of the global seed coating agent market and the structure of the Chinese seed coating agent market, it shows that the development potential of seed coating agents in China is worthy tapping. In particular, seed coating agents for rice and wheat are worthy paying constant attention to.

## **China's pesticide-fertilizers outshine others**

China is a big fertilizer producing and consuming country. Fertilizer has played a very important role in guaranteeing food safety and increasing farmers' income. In recent years, with the rise in fertilizer manufacturing costs and the decline in profits, the percentage of money-losing enterprises has increased. Except few enterprises which have seen growth despite the adverse situation, most enterprises have seen some declines in operating revenue and net profit. Forced by excess capacity in the traditional fertilizer industry, a lot of fertilizer enterprises have shifted to the new-type fertilizer market.

With the adjustment of national strategies and the development of new-type fertilizers being included in the 12th Five-year Development Strategy, the pesticide and fertilizer industries have reached a critical moment for transformation and upgrading and pesticide-fertilizers have welcomed business and development opportunities. As the agricultural working population in China has decreased sharply and that will promote great improvement in agricultural scale and mechanization, integration of pesticides and fertilizers and integration of multiple functions will be future development direction. The transition from single nutrition to multi-functional, complex development will be the development focus in the transformation and upgrading of the pesticide

and fertilizer industries. Large fertilizer companies and traditional pesticide companies actively participate in the transformation, set foot in the pesticide-fertilizer market and invest in the pesticide-fertilizer products as an important strategic industrial investment.

According to the statistics of relevant materials, there are currently less than 20 pesticide-fertilizer registration companies in China and the total number of registered pesticide-fertilizer products is less than 50 and that of registered pesticide-fertilizer varieties, less than 20. Moreover, most of the registered pesticide-fertilizer products are herbicides and fungicides and are in GR for direct broadcasting, and the active ingredient content is less than 1%.

Currently there is huge demand for pesticide-fertilizers in both domestic and international markets, as pesticide-fertilizers can solve the current labor shortage problem and meet the demand of high value-added markets such as gardening, flower and lawn markets. Despite the sluggishness in the traditional fertilizer market and the chemical fertilizer market, the pesticide-fertilizer industry is thriving. The Chinese pesticide-fertilizer industry shows a continuous growth trend. According to relevant materials, it is expected to reach 300 billion yuan in future.



## Review and future trend of glufosinate-ammonium market

### 1. Development trend of global glufosinate-ammonium market

Since it was registered in China in 1984, glufosinate-ammonium had been flat. However in recent years its market share has soared. Currently its global scale has reached US\$400 million. Enterprises are very active in registration. There were only 11 glufosinate-ammonium registration certificates in China in 2012, but in 2015 the number soared to 130, including 26 registration certificates of technical, five certificates of technical concentrates and 99 certificates of preparations. 2015~2016 saw a rapid development in the glufosinate-ammonium market. Domestic glufosinate-ammonium production capacity increased sharply and market attention rose perpendicularly. On the contrary, glufosinate-ammonium prices continued to fall. Price war became the main theme of the domestic and even the international market.

### 2. Price plunge and concentrated release of production capacity

In the past year, a lot of glufosinate-ammonium production capacity was released in China. In 2015 the glufosinate-ammonium production capacity in China was 13,000 tons and it is expected to double to 26,000 tons in 2016. The price of glufosinate-ammonium is like on a roller coaster. As of August 2016, the price fell from 330,000 yuan a ton in early 2015 to 118,000~119,000 yuan a ton, almost equal to the cost. However, the bottoming of glufosinate-ammonium price will be a long-term process, and it is also the route that it must take to become a bulk pesticide.

Currently glufosinate-ammonium manufacturers such as Lier Chemical, Hebei Veyong and Shijiazhuang Ruikai Chemical are operating well (see Table 1 for detailed data). In the global market, international giants have also accelerated expansion. Bayer CropScience plans to double the global production capacity of its Liberty® herbicide. Moreover, its world-class glufosinate-ammonium herbicide manufacturing factory on foreign shores to be completed by the end of the year is expected to have a production capacity of 6,000 tons a year. Moreover, Bayer recently

joined hands with Evonik Industries and the two invested US\$ 200 million to build two glufosinate-ammonium intermediate factories in Mobile County, Alabama, the United States to manufacture the intermediate materials for Liberty®, which are expected to be put into operation in the middle of 2017.

*Table 1 Production capacity of major Chinese glufosinate-ammonium manufacturers in 2016 (t)*

Company	2016 production capacity	Production capacity to be released in future
Bayer	5,500	6,000 under construction
Zhejiang Yongnong	3,000	-
Lier Chemical	3,600	Total planned capacity: 17,600
Ruikai Chemical	6,000	Completed and put into operation in 2016
Inner Mongolia Jiaruimi Fine Chemical Co., Ltd.	3,000	Completed and put into operation in 2016
Sichuan Fuhua	0	12,000 under construction
Veyong	500+1,000	Planned: 3,000
Jiangsu Huangma	500	-

According to statistics, the global glufosinate-ammonium production capacity before 2015 was about 7,000~8,000 tons, but it is around 20,000 tons today. By the end of 2016 the conservative estimate is about 25,000 tons. 2016 will be a rapid capacity expansion period for glufosinate-ammonium in China. By 2018, 30,000 more tons of capacity are expected to be released.

As one the developers of glufosinate-ammonium, Bayer will put its expansion glufosinate-ammonium device into use in 2017. According to the price trend of other pesticides, the price of glufosinate-ammonium is expected to be even lower in 2017 than it is now. Production capacity adjustment will probably end or stabilize in 2019, when a new round of prices will appear.

### 3. Prices were adjusted within a reasonable range and supply will decline in the short term

At the beginning of 2015, glufosinate-ammonium was a star among agrochemical products in China and its price surged and even reached 350,000 yuan a ton. However, in August the mainstream quotation of 95% glufosinate-ammonium in China fell to 118,000~119,000 yuan a ton and the actual transaction price to 115,000~116,000 yuan a ton. The mainstream price of 200L 20% glufosinate-ammonium at Shanghai Port was 32,000~33,000 yuan per kiloliter, which is higher than the price in 2015, while the price of glufosinate-ammonium technical has fallen by two thirds. In terms of the operation state of suppliers, suppliers in East China run under their production capacity. That has formed certain support to prices. The price of glufosinate-ammonium will be weak and stable in the short term.

### 4. Glufosinate-ammonium will increase in quantity and the price will stabilize

Even though the supply of glufosinate-ammonium in China has currently declined, in the long run there will be 30,000 tons of production capacity in the next 2~3 years. As the release will not be concentrated in certain time, there will not be sharp fluctuations in price. Considering seasonal and supply effect, glufosinate-ammonium technical in China is expected to consolidate between 100,000 and 120,000. The glufosinate-ammonium after-market will enter into a stage featuring "increasing quantity and stable prices".

### 5 Positive factors in future market

1. The consumption in major sales regions is still increasing

As the glyphosate resistant weed problem is becoming increasingly serious, the market demand for glufosinate-ammonium will also increase. The major sales regions of glufosinate-ammonium are Japan, Korea, South and North America and Europe including the United States, Canada and the EU. The consumption in Southeast Asian countries and some Asian countries has also increased in recent years, injecting positive factors in the future glufosinate-ammonium market.

2. Glufosinate-ammonium resistant crops show good

prospects

The sales of glufosinate-ammonium, as a patented product of Bayer, are mainly benefited from the plantation of Bayer's glufosinate-ammonium resistant soybeans and rapes, which have already been widely planted now. Over 20% of the rape fields in Canada grow glufosinate-ammonium resistant genetically modified rapes. It's learnt that Bayer is currently developing glufosinate-ammonium resistant genetically modified potato seeds. With the promotion of the two agrochemical giants Monsanto and Bayer, glufosinate-ammonium show a good prospect. If the promotion of glufosinate-ammonium resistant crops achieves expected goals, glufosinate-ammonium will threaten the leading position of glyphosate among herbicides.



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## 36 pesticide-related listed companies: 33 making profit, 3 losing money

According to the financial statements of the listed companies, the operating revenue of 36 pesticide-related listed companies in the first half of 2016 was up to 70.509 billion yuan, the net profit was 2.725 billion yuan and the revenue from pesticides was 23.713 billion yuan.

In the first half of the year, among the 36 listed companies, three lost money and 33 made profit, of which Zhengbang Technology and Lanfeng Bio-chem turned loss into gain. CNADC Seed Industry, Qianjiang Biochemical, New Dragon Joint-stock and SoochowChem all saw a profit growth of over 100%.

Rank by operating revenue: Sinochem International ranked the first in the industry with an operating revenue of 19.624 billion yuan in the first half of 2016; Zhengbang Technology and Xingfa Group ranked the second and third

with an operating revenue of 8.694 billion yuan and 6.614 billion yuan respectively.

Rank by net profit: In the first half of 2016, all the listed companies made profit, except Wynca Group, Gofar Group and ENN Holdings. Zhengbang Technology ranked the first in the industry with a net profit of 610 million yuan in the first half of 2016; Lianhetech and Yangnong Chemical ranked the second and third with a net profit of 246 million yuan and 213 million yuan respectively.

Rank by revenue from pesticides: Red Sun ranked the first in the first half of 2016 with a revenue from pesticides of 2.165 billion yuan; Nutrichem and Rainbow ranked the second and third with a revenue from pesticides of 1.99 billion yuan and 1.917 billion yuan respectively.

### Summary of operations on pesticide listed companies in 2016 H1

*Unit: 100 million yuan*

Company	Revenue in pesticide	YoY(%)	Operating revenue	YoY(%)	Net Profit	YoY(%)
ShandongShengli (000407)	3.26a	-36.07	11.91	-20.12	0.18	7.72
Redsun (000525)	21.65	3.89	21.74	-34.37	0.57	-67.39

Sanonda (000553)	8.04b	-27.64	10.06	-18.58	0.17	-85.72
Zhengbang Technology (002157)	2.53	-4.58	86.94	1.13	6.10	22680.73
NOPOSITION (002215)	13.21	-0.45	15.09	4.16	0.19	-91.37
Lianhetech (002250)	11.19c	-19.79	17.72	-7.81	2.46	-18.58
Hailir Chemical (002258)	9.16	18.92	9.18	13.54	0.98	10.64
Changqing Agrochemical (002391)	9.39	-0.47	9.54	0.89	1.07	-18.26
Huifeng Agrochemical (002496)	13.06d	5.09	19.36	26.27	1.04	-6.85
Lanfeng Biochemical (002513)	5.7	0.18	6.80	18.21	0.64	804.00
Limin Chemical (002734)	5.36	24.5	5.38	23.36	0.59	95.24
Guoguang Agrochemical (002749)	2.83	27.00	3.74	1.63	1.04	11.73
ABACHEM (300261)	1.34e	-46.93	2.87	-11.38	0.12	-66.63
Meiland Agricultural (430236)	0.77f	29.22	0.82	37.56	0.13	45.23
Xingfa Group (600141)	11.73g	34.13	66.14	-0.84	0.35	-32.72
Shenghua Biok (600226)	0.76	-49.16	4.63	-12.62	1.49	60.80
Zhongnongfa Seed (600313)	1.82	—	22.45	108.01	0.08	358.92
Jiangshan (600389)	10.98	-5.04	32.28	106.53	0.04	-74.45
Yangnong Chemical (600486)	15.69	-11.77	15.95	-11.49	2.13	-15.20
Sinochem International (600500)	0.002	-8.44	196.24	-12.94	1.66	-53.24
Gofar Fine Chemical (600538)	0.96	-25.16	2.32	-3.09	-0.12	-1853.22
Wynca (600596)	14.21	-22.57	34.86	-12.91	-0.17	—
Hunan Haili (600731)	4.55	-4.4	5.49	-7.14	0.12	7.55
Qianjiang Biochemical (600796)	1.31	4.44	2.24	7.77	0.24	100.61
Xin'ao (600803)	6.85	13.29	26.11	-2.05	-0.43	—
Hebang (603077)	1.52	—	14.50	6.71	1.23	-10.19

Guangxin Agrochemical (603599)	7.86	0.19	7.86	0.19	1.00	15.06
Xinnong (831868)	3.12	0.61	3.14	0.68	0.30	-14.20
Dongfang Chemical (832940)	0.75	—	1.05	-31.25	0.01	-75.11
Xinlong (833098)	0.19	—	0.33	81.77	0.07	147.83
Yingnong Technology(833361)	0.35	—	0.35	-34.30	0.04	-63.22
Nutrichem Company (833819)	19.90	—	19.90	-6.53	1.77	6.01
Shandong Luba (834117)	6.26	—	6.28	-15.11	0.63	-52.09
Dongwu Chemical (834330)	—	—	0.91	41.49	0.14	365.48
Geyi Chemical (834637)	1.66	—	1.66	-4.69	0.31	47.41
Rainbow Chemical (837380)	19.17	18.83	19.25	18.77	1.08	12.87

a Agrochemical revenue

b Revenue of Agricultural products including fertilizer and pesticide

c Revenue of pesticide and intermediate

d Revenue of pesticide and intermediate

e Revenue of pesticide intermediate

f Prime operating revenue

g Revenue of glyphosate and glycine etc.



**MEG**  
Metchem Enterprise Group  
迈可企业

Metchem Enterprise Group, founded in 2001, is a diversified group in the field of agrochemicals. MEG has built a worldwide sales network, covering more than 50 countries and regions globally with over 150 partners. The accelerated supply chain has been leading MEG to be uniquely competitive in developing pesticides including Insecticides, Herbicides, Fungicides and Combinations. Sales revenue of MEG in 2011 reached USD 80 Million, and total export amount exceeded USD 60 Million. In the next five years, based on the international marketing advantage, MEG strives to develop itself to be an international market oriented manufacturing enterprise by implementing the strategy of "independent innovation, talent-oriented and brand construction".

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**Tel:** 0086-21-51082199 **Fax:** 0086-21-50276058  
**E-mail:** manager@megchemical.com

	Technicals		Formulations	
Herbicides	2,4-Dichlorophenoxy	96%	2,4-D dimethyl amine salt 89%SL, 72%SL, 48%SL	
	Clethodim	94%	24%EC, 12%EC	
	Oxadiazon	96%	28%EC, 38%SC	
	Dicamba	98%	48%AS, 70%WDG	
	Atrazine	95%	50%SC, 38%SC, 30%WDG, 30%WP, 81%WP	
	Pendimethalin	95%	33%EC	
	Quizalofop-p-ethyl	95%	5%EC, 8%EC, 10.8%EC, 12.9%EC, 19%EC	
	Nicosulfuron	95%	75%WDG	
Insecticides	Tribenuron-methyl	95%	75%WDG, 16%WP	
	Glyphosate	97%	41%SL, 50%SP, 62%PA, 75%SP, 75%WBG	
	Chlorpyrifos	98%	18%GR, 20%ME, 30%EW, 30%WP, 48%EC	
	Imidacloprid	97%	5%EC, 5%WP, 19%WP, 20%SL, 25%WP, 70%WDG	
	Accephate	95%	30%EC, 40%EC, 75%SP	
	Abamectin	95%	10%SC, 5%EW, 1.8%EC, 0.5%EC	
	Emamectin Benzoate	75%	5.7%WDG	
	Aluminium phosphide	85%	56%TB	
Fungicides	Metalddehyde	98%	5%GR, 10%GR, 40%SC	
	Carbendazim	98%	50%SC, 40%SC, 25%WP, 30%WP, 80%WP	
	Tebuconazole	97%	12.5%EW, 12.5%WP, 12.5%ME, 80%WP, 43%SC, 28%EC	
	Difenoconazole	95%	10%ME, 19%SC, 40%SC, 20%EC, 10%WDG	
	Propiconazole	95%	20%EC	
	Azoxystrobin	95%	20%SC, 50%WDG	
	Kasugamycin	70%	2%SL, 3%WP, 6%WP	
	Dimethomorph	97%	10%EW, 50%WP, 50%WDG, 80%WDG	

**Collaboration leads to success**



## Wynca Group:

## Establishing agricultural service platforms to reduce losses

In the first half of the year, Wynca Group (600596) achieved an operating revenue of 3,485,629,400 yuan, down 12.91% from the corresponding period last year; the net profit attributable to listed company shareholders was -17,373,300 yuan, while in the corresponding period last year it was -33,995,800 yuan.

Faced with the industry predicament, Wynca Group has established an agricultural service platform and a comprehensive service platform of organosilicone. The agricultural service platform, based on "airplane spray" and the "Internet+" concept, has expanded its service scope to comprehensive agricultural material product supply, crop solutions and financial service, aiming to create an O2O comprehensive agricultural service ecology throughout the whole industry chain.

In the first half of the year, the company's external equity investment increased by 15.29 million yuan, of which 15 million yuan was invested in Nongfeike Agricultural Science and Technology Co., Ltd. (which mainly provides agricultural ecological service) (in addition to the 15 million yuan the company invested in 2015, the company now has 46.15% stake in Nongfeike).

Based on the current market situation and the company's production and operation conditions, the accumulative net profit attributable to parent company from the beginning of the year to the end of the next report period will probably still be loss, but the accumulative losses are expected to decline compared to those from January to June.

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# Yangnong Chemical Stables the Sales of Main Pesticide Products and Expands the Formulation Market

Recently, Yangnong Chemical (600486) released H12016 report, operating revenue reached 1.595 billion yuan, down 11.49% YoY, a net profit attributable to listed company shareholders of 213 million yuan, down 15.20% year on year.

During the report period, the formulation sales increased by 24% for agrochemical market, affected by low price, insufficient demand of domestic agrochemical

market, pesticide sales dropped by 25.16%. Several disadvantageous factors such as the continuously sluggish international market, intensifying competition of price caused fall in prices and transaction volume in the international market. Yangnong focused on the sales of glyphosate, lambda-cyhalothrin and Bifenthrin with a large volume. The exports amounted to USD 998 million, down 4.26% during the report period.

Yangnong main business by category			
Unit: Yuan			
By category	Total Operating revenue	Total Operating cost	Net Profit (%)
Pesticide	1,569,303,334.98	1,151,989,018.79	26.59
Insecticide	928,572,766.69	651,993,407.21	29.79
Herbicide	545,106,920.42	417,108,716.17	23.48
Other	95,623,647.87	82,886,895.41	13.32
Total	1,569,303,334.98	1,151,989,018.79	26.59

## Imidacloprid helped boost operating revenue for Changqing in the first half of 2016

In the first half of the year, Changqing (002391) achieved an operating revenue of 954,491,300 yuan, up 0.89% from the corresponding period last year; the net profit attributable to listed company shareholders was 107,489,700 yuan, down 18.27% from the corresponding period last year. As of June 30, 2016, the company's total assets were 3,849,673,500 yuan, up 8.39% from the beginning of the year; the net asset attributable to listed company shareholders was 2,874,236,000 yuan, up 0.03% from the beginning of the year. In the first half of 2016, the market demand for the company's insecticides such as imidacloprid was huge, helping the company create a year-on-year growth of 11.09% in the operating revenue from insecticides. The company's operating revenue from herbicides, except fomesafen and dicamba that were in great demand, decreased by 2.07% year on year.

During the report period, the company's annual production projects of 450-ton triasulfuron technical, 300-ton epoxiconazole technical and 200-ton indoxacarb technical were still under construction. The foreign fluidized bed incinerator project with a capacity of 29,500 tons a year has entered into the installation and debugging phase, providing guarantee for its up-to-standard operation after the convertible bond fundraising project is completed. During the report period, the company obtained four patents for invention and its R&D strength was further improved.





**QINGDAO HANSEN BIOLOGIC SCIENCE CO.,LTD.**

**BRIEF INTRODUCTION**

Qingdao Hansen Biologic Science Co., Ltd is a major High-Tech enterprise, Who is located in beautiful rich coastal city-Qingdao. The company founded in 2002, belong to the national development and reform nominated pesticides production enterprises, state-level High-Tech enterprise. We has passed the ISO9001, ISO14001, GB/T28001 certification system. Qingdao Hansen has the key technology on Fomesafen, Fluoroglycofen-ethyl, Lactofen, Trifluralin, Propargite and Thifluzamide production , are in the leading domestic level. On the basis of principle equality and mutual benefit, we would like to communicate and cooperate with people from entire business circle, and we are also keen to cooperate with domestic and abroad customers to develop new products and markets.





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## Rainbow listed in Top 100 Export Enterprises in China

According to the Top 100 Enterprises in General Trade Export of China in the First Half of 2016 issued officially by customs-info.com, Shandong Weifang Rainbow Chemical Co., Ltd. (Rainbow) ranks the 76th. It's also the first time Rainbow has entered the Top 100 Enterprises in General Trade Export of China. Among the Top 100 Enterprises, there are only two agrochemical and crop protection enterprises. The other agrochemical and crop protection enterprise is Sino-agri Holding Company Limited, which ranks the 91st.

At the beginning of 2016, Rainbow made a prediction about the domestic and external market environment in the first half of 2016: in the domestic market, safety and environmental protection situation would be grim; self-produced technical costs would be high; due to limited regional approval projects, project progress would be slow; with serious depreciation in Argentine, Brazilian, Colombian and Mexican currencies, the situation would not be optimistic. Benefited from the further implementation of the strategy of establishing a global "quick market entry platform" and the localization operation of more target countries, Rainbow saw a growth in both revenue and profit in the first half of 2016.

In the second half of the year, there will still be challenges and opportunities in the market. Rainbow will continue to promote and implement the strategy of establishing a global "quick market entry platform", keep the good growth momentum in both revenue and benefit and guarantee the interests of the company and investors.



More info. Visit: [www.ccpla.org.cn/en](http://www.ccpla.org.cn/en)

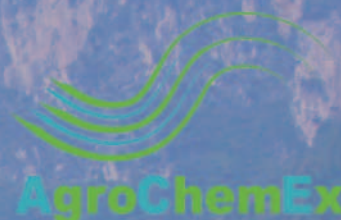
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## Guangxin Joint-stock: Intending to raise 1.399 billion through private placement to enhance its main business

Guangxin Joint-stock (603599) recently announced a private placement plan, intending to issue no more than 88.2339 million shares with a price of no less than 16.31 yuan per share to no more than 10 specific objects to raise no more than 1.399 billion yuan, which will be used in the 3,000 tons/year pyraclostrobin project, the 1,200 tons/year famoxadone project, the cleaner production technology improvement project of 15,000 tons/year o-phenylenediamine, the 24MW combined heat and power project in the north zone of Xiangyu Chemical Industry Park, the wharf engineering project and the company's R&D center project.

Currently famoxadone is one of the joint promotion products of the National Agricultural Technology Extension Service Center of the Ministry of Agriculture of the People's Republic of China and the government procurement pesticide varieties for rice blast. A few companies in China currently manufacture famoxadone and their production capacity is limited, so the famoxadone technical has a relatively large market space. The total investment of the 1,200 tons/year famoxadone project is 381 million yuan, in which the company intends to invest 315 million yuan of the raised funds. After the project reaches the design capacity, the company is expected to see an increase of 660 million yuan in annual sales revenue and 154 million yuan in total annual profit, and the internal rate of return after tax is expected to reach 32.13%.

The company said that it can further improve its R&D ability, improve product structure, expand production scale, lower transportation cost, improve profitability and consolidate its leading position in the industry by implementing the fund raising project.



More info. Visit: [www.ccpia.org.cn/en](http://www.ccpia.org.cn/en)  
About agrochemical show: [www.agrochemex.net](http://www.agrochemex.net)



## **The 9<sup>th</sup> AgroChemEx opened in Lima, Peru**

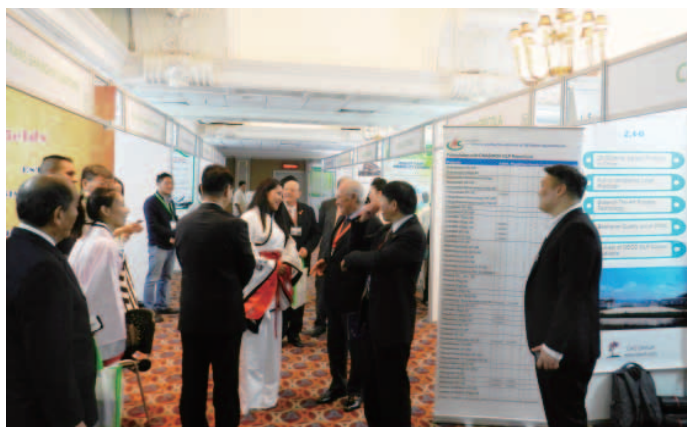
"The 9th AgroChemEx (Peru)" (Agro Peru 2016), jointly organized by the China Crop Protection Industry Association (CCPIA), the China National Chemical Information Center (CNCIC) and the ADEX of Peru, was opened ceremoniously at the Sheraton Lima Hotel & Convention Center in Lima, Peru on August 29.

Agro Peru is a brilliant work of the AgroChemEx series exhibitions that has been presented in Latin America for the first time. The exhibition has received great support from the Ministry of Agriculture of Peru, the

Ministry of Commerce of Peru, the Peru Embassy in China, the Chinese Embassy in Peru, the ADEX of Peru, etc. Meanwhile, the exhibition is the only specialized exhibition in Peru that focuses on agrochemicals, farm machinery and associated equipment. AgroChemEx has been successfully held in many countries over the years, such as Egypt, Turkey, Ukraine, Myanmar and Vietnam. The holding of AgroChemEx in Lima, Peru this year has further promoted the technical communication and trade cooperation between the Chinese agrochemical industry and the Latin American market.



Ribbon-cutting at the opening ceremony



Exhibition site

The exhibition, combining professional meetings and exhibitions, had an exhibition area of 1,500 square meters and attracted some 40 exhibitors. Officials and experts from China, Peru, India, Chile, Ecuador, Paraguay, etc. were invited to give reports on the agrochemical registration policies and market situations of their respective countries. Nearly 400 merchants from Peru, China, Ecuador, Chile, Paraguay, the United States, Canada, Argentina, Brazil, etc. came to the exhibition for negotiation and visit.



At the forum

During the exhibition, at the invitation of the Peruvian Citrus Association, some exhibitors visited two farms in Huaral, inspected local crop production bases such as potatoes and citrus and listened to the introduction of farm managers on agrochemical application and residue detection of crops throughout the whole production process. The exhibitors also paid a visit to the local

agrochemical market. They learnt about the market situation of local agrochemicals and had in-depth discussions with local dealers.

Since China and Peru signed the Free Trade Agreement in 2009, the two countries have deepened win-win trade cooperation and relevant high officials of both sides have paid frequent visits. So far China is the biggest trade partner and export market to Peru, and Peru is the



seventh largest trade partner in Latin America to China. With rapid agricultural development, the demand for agrochemical products in Latin America is growing rapidly. In 2013, China exported 410,000 tons of agrochemicals to Latin America, accounting for about 25% of the total agrochemical exports of China. The Latin American countries with the fastest growing demand for Chinese agrochemicals include Brazil, Columbia, Uruguay and Peru. The Latin American countries that have imported over US\$100 million worth of agrochemicals from China include: Brazil, Argentina, Columbia, Uruguay and Paraguay. South America has great market potential and its agriculture seeks sustainable development. We will lead agrochemical companies to further explore and maintain the Peru and Latin American markets together with our strategic partners in the agricultural field.



# The 9<sup>th</sup> China Agrochemical Innovation Awards by CCPIA-Technology Innovation Awards Released



"China Agrochemical Innovation Awards" evaluates and presents awards once every year in the aim of giving incentives to excellent teams or individuals for their significant contribution to the development of the Chinese pesticide Industry. Commissioned by China Crop Protection Industry Association (CCPIA), China Agrochemical Innovation Award Review Office organized the evaluation

word for the 9th China Agrochemical Innovation Awards-Technology Innovation Awards. There are 24 projects to be awarded altogether. The detailed awards will be announced and presented on the Theme Conference of 2016 National Agrochemical Exchange Meeting on 15 October, 2016.

## The 9th China Agrochemical Innovation Awards-List of Projects to be granted with Technology Innovation Awards

No.	Project	Company
1	Development and application on 10% bifenthrin chlorfenapyr SC	Hailir Pesticides and Chemicals Group
2	Research on technology of 10% mesotrione dispersible suspending agent SC	Shandong Luba Chemical Co., Ltd
3	16% Pyrazole - ethyl Pretilachlor large granule	Nanjing Gaozheng Agricultural Chemical Co. Ltd.
4	Research of innovation and application technology on 30% bupirimate - difenoconazole microemulsion	Qingdao aodis Biological Technology Co.LTd.
5	31% Thiram - propiconazol	Anhui Fengle Agrochemical Co., Ltd
6	Research synthetic technology of 96% command SC	Weifang Xiada Chemical Co.,Ltd.
7	Synthesis and development of formulation product on glyphosate potassium salt TC	Zhejiang Wynca Chemical Group
8	Industrialization development of epoxy beetle	SHANGHAI SHENGONONG PESTICIDE CO., LTD.
9	Research of technology for validamycin A produced by directional extraction method	Wuhan Kernuo Biotechnology Co., Ltd
10	Green synthesis technology of dinotefuran TC and development of 25% dinotefuran dispersible suspending agent	Jiangsu Kwin Group
11	Recycling technology and industrialization development of glycine glyphosate	Fuhua Tongda Agro-chemical Technology Co., Ltd
12	Development and popularization application of plant protection equipment with high efficiency intelligence	Guangxin Tianyuan Biochemistry Co., Ltd.
13	Hightoptical indoxacarb TC	Jingbo Agrochemicals Technology Co., Ltd

14	Innovation of flubendiamide with high efficiency and safety	Shenyang Sinochem Pesticide and Chemical Development Co.,Ltd.
15	Development and application on high efficient herbicide of 30% Pyrazosulfuron - carfentrazone ethyl wettable powder	Zhejiang Tianfeng Bioscience Co., Ltd.
16	Cleaning new technology and industrialization PMIDA based on HCN route	Chongqing Ziguang Chemical Co.,Ltd.
17	Synthesis and pilot batchemethyl of acrylic acid series copolymer dispersant	Shanghai Normal University Shanghai Shida Polymer Material Co.,Ltd.
18	Study on New Technology of after etherification of fenoxaprop-P-ethyl TC	Zhejiang Hisun Chemical CO.,LTD.
19	Synthesis of metalaxyl-M TC	Zhejiang Yifan Chemicals Co. Ltd
20	Industrialization technology of (S)-Metolachlor with continuous asymmetric catalytic hydrogenation	Nanjing Tech university Jiangsu Changqing Agrochemical Co., Ltd
21	Application of catalytic hydrogenation of green synthesis technology used in producing special intermediate of pesticide	Zhejiang Xinnong Chemical Co., Ltd Zhejiang University of Technology
22	Development and popularization application of Cyazofamid-chlorothalonil SC (Bijing)	Sino-agri Leading Biosciences Co.,Ltd.
23	Key technology development and industrialization of synthesis of tebuconazole	Jiangsu Sevencontinent Green Chemical Co., Ltd
24	Recycling technology of trifluralin nitrification process of waste acid	Jiangsu Fengshan Group Co., Ltd



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On August 15th, 2016, the Agrochemical Industry HSE Training Session, hosted by the China Crop Protection Industry Association (CCPIA) and prepared by Shanghai Zhongnong Chemical Technology Co., Ltd., was held in Wuxi, Jiangsu.

## The 1<sup>st</sup> Process Safety Lecture Held in Wuxi



(Shirley Xia, CCPIA Deputy Secretary-General)

At the beginning of the session, CCPIA Deputy Secretary-General Xia Feng made a speech. She pointed out that process safety is the top priority in the production management of pesticide synthesis companies. As an important means of process safety management, HAZOP (Hazard and Operability Analysis), which is scientific, systematical and comprehensive, is widely accepted and applied by global industry. Many Chinese agrochemical enterprises started to introduce HAZOP many years ago and some enterprises above the designated scale have accumulated many experiences and achieved good results in the application and promotion of HAZOP. However, a number of enterprises still fail to achieve expected results. In view of that, the CCPIA has thus organized "The 5th

Chinese Agrochemical Industry HSE Training & 2016 Agrochemical Industry Process Safety/HAZOP Lecture" and invited experts from large transnational companies and advanced enterprises in the Chinese process safety field to explain and drill key points in process safety management.



(Xu Xiangming, Chief Engineer of CCPIA Shanghai Office)

Mr. Xu Xiangming, Chief Engineer of CCPIA Shanghai Office, presided over the session on the first day. He brought forward the essential points and introduced the purposes of process safety management, the factors in the implementation guide and how to carry out excellent process safety management in a comprehensive way.

Mr. Zhang Jianlong, Director of the Process Safety

Improvement Project of Syngenta (China) Investment Co., Ltd., analyzed the causes of the out-of-control chemical reaction and vapor cloud explosion cause of Synthron and by comparing with relevant factors in process safety management, he found out the root causes for the accident: lack of hazard identification, lack of process safety information and training, invalid control of product formula change.....enlightening representatives present at the session.

Mr. Xu Xinliang, Senior Process Safety Technology Director of Dow Chemical (China) Investment Company Limited, shared the Loss Prevention Directory. In his report, he listed the specific items in loss prevention in process safety management, including plane factory layout, electricity, firefighting, equipment, chemical storage, loading and unloading trucks, detection system, combustible dust and solid, pipeline and relevant buildings and so on, which has gathered The Dow's precious experiences in process safety management over the years.

Director Ding Guanghua at CCPIA Shanghai Office, together with the representatives present at the session and several experts, performed an analysis and drill on HAZOP on the spot and analyzed and explained HAZOP management system, team building, basic knowledge about HAZOP, preliminary preparation work, points worth noting and specific implementation steps. Group discussion was also included in the lecture. The representatives actively participated and had independent analysis within groups.

HSE evaluation, as part of contractor performance appraisal, is indispensable. Mr. Liang Changbao, HSE Manager of Bayer CropScience (China) Co., Ltd., shared their experiences in contractor bidding, such as, raising HSE requirements and including HSE awards and punishments in contract annexes; including pointed applicability training in field management; performing whole-process operation monitoring, finding out problems promptly and issuing awards or punishments promptly; having field managers be responsible for HSE management, etc. Mr. Lai Wenhua from DuPont emphatically introduced the framework of MIQA and explained it in detail based on DuPont's implementation of MIQA. He also shared the best practice in industry—DuPont's ten key performance indexes for maintenance and reliability. Mr. Zhao Mingjie, Deputy General Manager

and Responsible Care Director of Nutrichem, which started to construct the process safety management system years ago, shared precious experiences on how to establish an effective process safety management system based on his own experiences.

After the two-day session was concluded, many enterprises said in interviews that they had gained a lot in the session and had new and deeper understanding of HAZOP analysis and process safety management. Of course, it requires more efforts and practice to turn what's learnt into practice.



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## CCPIA Summit on Pesticide-fertilizer Held in Zhengzhou

On August 13th, some 240 representatives from agrochemical and fertilizer companies gathered in Zhengzhou, participating in the Establishment of CCPIA Professional Committee for Pesticide-fertilizer and High-end Seminar on Pesticide-fertilizer organized by the China Crop Protection Industry Association (CCPIA). Relevant leaders from the Department of Crop Production of the Ministry of Agriculture (MOA) of the People's Republic of China, the Institute for the Control of Agrochemicals of MOA, the National Agricultural Technology Extension Service Center were invited to the seminar to explain relevant industry policies, senior experts in promotion and application of agricultural means of production, sugarcane and pesticide-fertilizer, loss reduction and efficiency improvement and representatives from transnational companies to share cutting-edge technology in the industry and enterprise representatives and industry leaders to share the pesticide-fertilizer research progress in China, the development ideas of pesticide-fertilizer in China and overseas registration policies of pesticide-fertilizer.

At the beginning of the seminar, CCPIA Secretary-General Li Zhonghua and President Meng Lianjun of Henan Crop Protection Industry Association addressed the seminar.



(Li Zhonghua, Secretary General of CCPIA)

Secretary-General Li pointed out that despite the

continued weak demand for traditional fertilizer and pesticides, pesticide-fertilizer enjoys a sustained growth; the pesticide-fertilizer, as the mixture of pesticide and fertilizer can enhance each other and save labor, but there are still problems in the industry, such as inadequate policies and regulations, lack of standards and insufficient guarantee for safety, stability and effectiveness of compounded pesticide-fertilizer. She also said that CCPIA, as an industry association, should set out some rules and thresholds and hoped that it can maintain a healthy and sustainable development in the pesticide-fertilizer industry by setting group standards.

#### Interpretation of industry policies by authorities

Chen Youquan, Sub-inspector of the Department of Crop Production, MOA, expressed his opinions on pesticide-fertilizer mixture management and service at the seminar: first, it's necessary to encourage professional service in the application link, integration of pesticide and fertilizer should be positioned in the professional service in the pesticide and fertilizer application link and China needs urgently to vigorously develop series matching professional service organizations before, during and after production; second, the mixtures of pesticide and fertilizer manufactured by enterprises should be registered for pesticide registration according to law and the fertilizer mixed in the pesticide-fertilizer compounds which are included in the fertilizer registration directory shall also be registered for fertilizer registration; third, relevant agricultural and quality inspection departments will strengthen pesticide and fertilizer market supervision and investigate and deal with the companies that mix pesticides with fertilizer without registration.

Liu Shaoren, Director of the Supervision Management Department of the Institute for the Control of Agrochemicals, talked about the latest changes in the registration policy from the perspective of management and emphasized that regulation violators will be severely punished. Director Liu said that the standard recognized by farmers is the final standard and crops, lands and users are the real judge of the rationality of the mixture of pesticides and fertilizer, and analyzed the points of focus of the three factors in the use of pesticide-fertilizer. Finally Director Liu expressed his thoughts on product formulations, quality management and label management and so on in pesticide-fertilizer registration and presented some new views.

#### Industry development trend

From the pesticide side, pesticide-fertilizer are pesticide granules; from the fertilizer side, pesticide-fertilizer is a special functional fertilizer. Li Weiguo, Chairman of Guangxi Tianyuan Biochemical Co., Ltd. said so. Chairman Li pointed out that to eliminate the doubts of the supervision department, it requires the industry to cooperate with each other, jointly establish standards on pesticide-fertilizer, promote the formation of group standards and in future national standards, make explorations and researches and establish pesticide-fertilizer safety database.

#### Cutting-edge technology that leads industry

An Yuxing, Deputy Director of Guangdong Bioengineering Institute, taking the pesticide-fertilizer for sugarcane for example, analyzed the efficacy evaluation and application prospect of pesticide-fertilizer in agricultural production. Director An introduced disease and pest occurrence of sugarcane and the research progress of sustained and controlled pesticide-fertilizer technology of sugarcane. He also mentioned that through research on pesticide and fertilizer interaction mechanism, based on the transmission, conduction and distribution laws of different insecticides in sugarcane and the nutrient demand law of sugarcane in different growth periods, China has screened out a series of efficient pesticide-fertilizer products and some of them have been merchandised. Zou Wei, Manager of SIPCAM (Shanghai) Co., Ltd., introduced the research and application of SIPCAM pesticide-fertilizer and by taking SIPCAM Trika series products as example, he stated SIPCAM's research and development situation of pesticide-fertilizer and product advantages.



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### Annual China Agrochemical Industrial Development Report

+Annual Report on Glyphosate

+ Report on Paraquat

+Annual Report on Acetochlor

+Annual Report on 2,4-D

+Annual Report on Triazine

+Annual Report on Imidacloprid

+Annual Report on Chlopyrifos

+Annual Report on Acephate

+Annual Report on Pymetrozine

+Annual Report on Avermectin

+Annual Report on Chlorothalonil

+Annual Report on Carbendazim

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+Annual Report on Tebuconazole

## New

### The 13th Five Year Development Plan of Agrochemical industry

1. The current situation of agrochemical industry
  - (1) The general situation of agrochemical industry
  - (2) The achievements of agrochemical industry
  - (3) The main existing problems of agrochemical industry
2. The situation faced by agrochemical industry
  - (1) The global agrochemical development situation and trends
  - (2) Domestic agrochemical development circumstances
  - (3) The opportunities and challenges faced by agrochemical industry
3. Guiding thoughts and basic principles
4. Development goals and main tasks
5. Industrial policy and guarantee measures

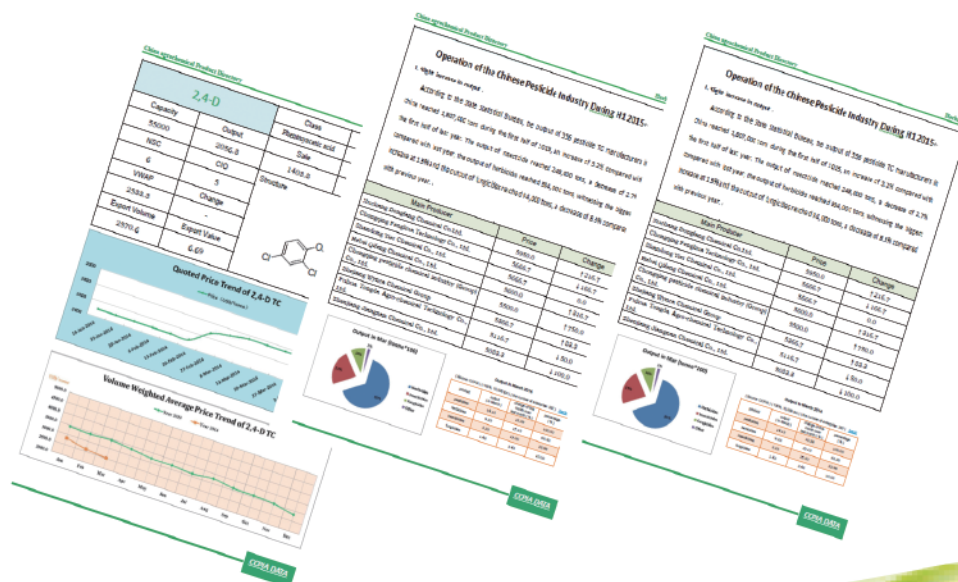
## China Agrochemicals Monthly Report

These monthly market reports includes 98+ important herbicides, insecticides, fungicides and PGR, which include Chinese pesticides capacities, output data analysis, manufacturers, price trend, sale, traders, import & export data etc. You can choose the report on products you focus on.

**Main products as follows:**

Herbicides	Fungicide	Insecticides
Glyphosate	Azoxystrobin	Thiamethoxam
Paraquat	Pyraclostrobin	Imidacloprid
2,4-D	Mancozeb	Chlorantraniliprole
Mesotrione	Trifloxystrobin	Fipronil
Metolachlor	Prothioconazole	Chlorpyrifos
Acetochlor	Copper fungicides	Lambda-cyhalothrin
Atrazine	Epoxiconazole	Clothianidin
Glufosinate	Tebuconazole	Avermectins
Pinoxaden	Metalaxyl	Deltamethrin
Pendimethalin	Cyproconazole	Acephate
Mesosulfuron-methyl	Boscalid	Cypermethrin
Nicosulfuron	Propiconazole	Bifenthrin
Clomazone	Chlorothalonil	Pleocidin

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# China Agrochemicals Market Analysis Report



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**CCPIA**

Established in April, 1984, China Crop Protection Industry Association (CCPIA) is a non-profitable organization registered as an independent legal entity under the Ministry of Civil Affairs. It was one of the earliest industrial associations to obtain approval from the Ministry of Chemical Industry. Currently, the organization is supervised by the Ministry of Information and Technology as well as the Ministry of Civil Affairs.

CCPIA has focused on building connections between government sectors and pesticide manufacturers as well as promoting international cooperation between these manufacturers since its establishment 31 years ago. Currently, CCPIA has 600+ members, which are constituted from manufacturers, universities, institutes and local crop protection industry associations, which are engaged in R&D, operation or production of pesticide TC and intermediates including adjuvants, formulation and packaging, or manufacturing of equipment including spraying equipment, etc.

**www.agrochemex.net**



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