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ORGANIZER:
China Crop Protection Industry Association
www.agrochemex.net

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Jack ZHAO Exhibitor Contact
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To guide the enterprises to grasp the economic situation and operation status of the agrochemical industry in 2016, predict the development trends of the industry, accelerate the structural adjustment of the industry and promote the healthy development of the industry in face of new international opportunities and challenges, China Crop Protection Industry Association (CCPIA) will hold the 3rd Analysis Meeting on Economic Operation of Agrochemical Industry & Announcement of Rankings of Agrochemical Enterprises in Yixing City, Jiangsu Province from May 11 to 12, 2016. Regarding the reform and transformation of the agrochemical industry, the conference this year will make analyses and predictions from the background and links of industry development and announce the lists of Top 100 Chinese Agrochemical Sales Companies, Top 50 Preparations Sales Companies and Best-selling Great Item Brands in 2015.

I. Contents
Part 1: Analysis of industry operation status
1. Current situation and development trends of petroleum and chemical industries
2. Analysis of registration of new and sub-new agrochemical products
3. Forecast of domestic pest outbreak and market analysis in 2016
4. Development trends and opportunities of global agrochemical market
5. Development and patents of global agrochemical products and their impact on China’s innovation of agrochemicals
6. Chinese agrochemical market development and prospect based on big data analysis
7. Technical purchase and price trend and prediction
8. Application of the treatment technology of the three wastes (waste gas, waste water and industrial residue) in agrochemical production
9. Development strategies of transnational companies

Part 2: Announcement of rankings
2015 Top 100 Chinese Agrochemical Sales Companies
2015 Top 50 Chinese Preparations Sales Companies;
Best-selling Brand Products in China;
List of Products with Most Market Potential.

Part 3: Commendations
2015 National Excellent Statistical Workers in Agrochemical Industry;
2015 National Excellent Correspondents in Agrochemical Industry.

II. Time and Venue
Check-in time: 13:00-20:00, May 10, 2016
Conference time: May 11-12 2016; 1.5 days
Venue: Le Meridien Yixing Hotel (No.455, East Yangxian Road, Yixing City, Jiangsu Province)

III. Contact
Ellie Xu 38464449@qq.com/Dr.Duan yousheng 13691545916@126.com

Welcome to attend 3rd Annual Conference on Economic Operation Analysis of Agrochemical Industry & Announcement of Rankings of Agrochemical Enterprises!
China Crop Protection Industry Association (CCPIA) is delighted to invite you to attend the 5th environmentally friendly pesticide formulations processing and production convention, which will be held in Wuxi, China, 21 to 22 April 2016.

The 5th Pesticide Formulation Convention has been developed to help the Chinese manufacturing and relevant enterprises to understand government’s requirement and production development of pesticide both at home and abroad in order to contribute to global food security and an environmentally sustainable future. The intensive two-day program will feature government policy’s analysis, formulation research and development, thought project cases.

What’s worth mentioning, high level speakers from leading companies around the world will give lectures, which show the news and outlook of pesticide formulation.

**Speakers Lineup**

**The Policy Study: Pesticide Registration and Management of China**  
Ying Ji, Chief agronomist, Institute for the Control of Agrochemicals, Ministry of Agriculture.

**Analyze Prohibited and Limited of Additives.**  
Yang Leng, Senior engineer, Shanghai Pesticide Research Institute

**The Current Development Situation of Pesticide Formulation in China**  
Quan Dai, Director, Pesticide F&P Engineering Center, CCPIA

**Handle the Difficult and Hot-spot Issues of Formulation.**  
Dr. Xuemin Wu, China Agricultural University

**Formulation Design and Development to Meet Customer and Market Needs**  
Dr. Holger Tank, Dow Chemical Company

**Develop Microcapsule-based on Product Characteristic**  
Dr. Klaus Kolb, BASF

**Introduction: International Policy and Formulation Trend**  
Bernhard Grimmig, Director, Bayer

**Research the Key Technical of Oil Dispersion**  
Zongjian Zhang, Senior engineer, Research Institute of China Chemical Science and Technology

**Development Trend of Nano Pesticide**  
Haixin Cui, Researcher, Chinese Academy of Agricultural Sciences

**Conference Fee**

Fee: 350 USD per person

**A/C No.** 0200022309014426780

**Bank Name:** LIUPUKANG SUB-BRANCH, BEIJING BRANCH, INDUSTRIAL AND COMMERCIAL BANK OF CHINA

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**Swift Code:** ICBCCNBJBJM

**Contact Information:** Alice Li, ccpia_zjh@126.com  
+86-10-84885145

**Registration Information**

<table>
<thead>
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<th>Registration Form</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prefix:</strong></td>
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<tr>
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<tr>
<td><strong>Country:</strong></td>
</tr>
<tr>
<td><strong>Company Name:</strong></td>
</tr>
<tr>
<td><strong>Position:</strong></td>
</tr>
<tr>
<td><strong>Work Telephone:</strong></td>
</tr>
</tbody>
</table>
Review and Forecast of the Pesticide Market in 2015

In 2015, 6.697 billion mu (446.5 million hectares) were invaded by diseases, pests, grass and mic, and 8 billion mu (5,333 hectares) were under prevention and control. Grains, cotton, material for edible oil, fruit and vegetables were saved respectively by 104 million tons, 1.1607 million tons, 3.4685 tons, 17.6628 million tons and 50.5262 tons.

Due to the increasing safe and environmental protection pressures, rising cost, stagnant market demand both at home and abroad, restriction on utilization of highly toxic pesticides and other factors in 2015, the pesticide industry ran at a low price level. Generally speaking, the pesticide industry has entered a stage of low profit and capital preservation.

Overall output slightly increased but with a slowed growth rate.

From January to December in 2015, the cumulative output of China chemical pesticide is 3.741 million tons, up 2.3% compared with the same period of 2014. From January to December in 2015, the production of China herbicide totaled 1.773 million tons, down 1.5% compared with the same period of 2014. The total production of insecticide is 513,536 tons, down 4.1% compared with the same period of 2014. The cumulative production of China herbicide is 182,126 tons, down 8.4% compared with the same period of 2014.

According to statistics of the National Bureau of Statistics of the PRC, the main business revenue of China agrochemical industry from January to December 2015 reached 310.72 billion, an increase of 5.1% YoY, and the profit totaled 22.55 billion, up 1.7% YoY, while that of biochemical and microbial pesticides increased by 1.9% YoY, keeping slow growth.

Economic indicators of the agrochemical industry in 2015

<table>
<thead>
<tr>
<th>Industry category</th>
<th>Number of enterprises (No.)</th>
<th>Total assets (RMB100 million)</th>
<th>Revenue from main business (RMB100 million)</th>
<th>Total profit (RMB100 million)</th>
<th>Total of profit and tax (RMB100 million)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Accumulative total in 2015</td>
<td>YoY change (%)</td>
<td>Accumulative total in 2015</td>
<td>YoY change (%)</td>
<td>Accumulative total in 2015</td>
</tr>
<tr>
<td>Chemical pesticide manufacturing</td>
<td>829</td>
<td>2277.54</td>
<td>8.6</td>
<td>3107.22</td>
<td>5.1</td>
</tr>
<tr>
<td>Chemical technical manufacturing</td>
<td>692</td>
<td>2017.43</td>
<td>7.4</td>
<td>2524.42</td>
<td>5.3</td>
</tr>
<tr>
<td>Biochemical and microbial pesticide manufacturing</td>
<td>137</td>
<td>205.64</td>
<td>15.0</td>
<td>287.25</td>
<td>9.4</td>
</tr>
</tbody>
</table>

Losses of the agrochemical industry in 2015

Despite a smaller growth of the overall profit from January to December 2015, the number of money-losing enterprises added 32.1% YoY, the amount of loss was RMB 872 million, up 53.8% YoY.

Both pesticide export and import volume and amount dropped

According to the statistics of the General Administration of Customs of PRC, the total export volume in 2015 reached USD 4.29 billion, dropped by 12.6% year-on-year; trade surplus was USD 0.79 billion, down 17.2% YoY.

In 2015, the pesticide export total volume reached 11,175,000 tons, an increase of 1.2%, and the export value reached 3.546 billion US dollars, a sharp decrease of 14.5%. While the fungicide export volume and value keep growing up by 10.2% and 5.3%. Although both the export volume and price have dropped, the proportion of pesticide formulations exports out of the total pesticide export keeps growing and has become the main force, while the proportion of pesticide TC exports keep dropping year by year.

2015 Import Statistics Data

<table>
<thead>
<tr>
<th>Category</th>
<th>(Ten thousand tons)</th>
<th>(Ten thousand)</th>
<th>Value</th>
<th>YoY(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pesticide</td>
<td>22.3</td>
<td>19,639.56</td>
<td>324.8</td>
<td>-4.5%</td>
</tr>
<tr>
<td>Insecticide</td>
<td>2.2</td>
<td>221.33</td>
<td>293.1</td>
<td>-10.8%</td>
</tr>
<tr>
<td>Fungicide</td>
<td>1.4</td>
<td>271.79</td>
<td>326.6</td>
<td>-10.3%</td>
</tr>
<tr>
<td>Herbicide</td>
<td>2.9</td>
<td>757.23</td>
<td>866.6</td>
<td>-11.1%</td>
</tr>
</tbody>
</table>

Over the same period, the pesticide import total volume reached a total of 90,000 tons, while imports amounted to 0.749 billion US dollars, respectively down by 2.7% and 2.8%.

Estimation of the Pesticide Market in 2016

According to preliminary statistical analyses from the 31 provincial plant protection stations, it is expected that the total pesticide demand (the product amount) in China in 2016 will reach 961,700 tons (304,800 tons on a 100% basis), a decrease of 6.18% compared with 2015. Products of demand exceeding 10,000 tons include (in descending order): glyphosate, dichlorvos, cupric sulfate, acetochlor, atrazine, carbendazim, chlorpyrifos and propineb pesticides.

In recent years, the industry of seed treatment agents continues to flourish, and many domestic and oversea pesticide companies show great interest. They have enhanced their efforts in promoting the research and development in seed treatment agents. Currently, registration for seed treatment is active and it has become a new growth point of the industry. There is still a huge market room for seed treatment, and during the next two or three years the number of registered seed treatment will keep growing.

<table>
<thead>
<tr>
<th>Category</th>
<th>Volume</th>
<th>YoY(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pesticide</td>
<td>9.0</td>
<td>-2.7</td>
</tr>
<tr>
<td>Insecticide</td>
<td>1.0</td>
<td>-1.1</td>
</tr>
<tr>
<td>Fungicide</td>
<td>2.3</td>
<td>-2.1</td>
</tr>
<tr>
<td>Herbicide</td>
<td>2.6</td>
<td>-10.1</td>
</tr>
</tbody>
</table>

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China’s Total Grain Yield in 2015 Increased by 2.4% YoY

According to the National Bureau of Statistics on December 8, 2015, China has witnessed another bumper harvest of grain this year. The total grain yield reached 621.435 million tons (1.24287 trillion jin). It increased by 14.408 million tons compared to 2014, an increase of 2.4%.

According to the National Bureau of Statistics’ sample survey of agricultural production households and agricultural production and management units of 31 provinces, the total sown area of crops across China reached 113.3405 million hectares (1.700107 billion mu). It increased by 617,900 hectares, an increase of 0.5% compared to 2014. The national average yield of grains reached 5,482.9 kilograms per hectare (365.5 kg/mu). The yield per hectare increased 97.8 kilograms, an increase of 1.8% compared to 2014.

Hou Rui, a senior statistician from the Rural Division of the National Bureau of Statistics, believes that the increase of the total sown area of crops in China was mainly contributed to by the fact that the central government had been strengthening efforts to support agriculture and benefit farmers which stabilized farmers’ expectation for a stable income, to support agriculture and benefit farmers which has played a very good role model for traditional agricultural production and management units of 31 provinces, the total sown area of crops across China reached 113.3405 million hectares (1.700107 billion mu). It increased by 617,900 hectares, an increase of 0.5% compared to 2014. The national average yield of grains reached 5,482.9 kilograms per hectare (365.5 kg/mu). The yield per hectare increased 97.8 kilograms, an increase of 1.8% compared to 2014.

Ten Pesticide Enterprises Listed in MIIT’s Demonstrated Projects of Green Production Processes

The Ministry of Industry and Information Technology of the PRC (MIIT) released the 2015 guide for key projects of industrial transformation and upgrading. The funds for industrial transformation and upgrading in 2015 mainly focus on intelligent production and “Internet +” action support capability and green production. Demonstrated Green production processes in the pesticide industry include: the catalytic hydrogenation technology in pesticide production, comprehensive application of glyphosate production waste water, electrochemical production of cloyprald, green production technologies for pyridine chloride, and demonstration project for green production of chlo rochloromethylthiazone. This will not only reduce the cost of domestic pesticide production, which has played a very good role model for traditional industrial transformation and industrial upgrading through implementing high and new technologies. Subsidy ratio does not exceed 20% of the total investment, and the amount does not exceed 30 million yuan.

On December 1, 2015, the Division of Raw Materials Industry of the MIIT released the list of "Industrial Transformation and Upgrading: Demonstration of Green Production Processes in the Pesticide Industry". It has ten projects in total including the comprehensive application of glyphosate TC in The Wynca Group, Jiangsu Youth Chemical Co., Ltd., and Inner Mongolia Tenglong Chemical Co., Ltd. Please refers to the details as listed in below table.

<table>
<thead>
<tr>
<th>Company Name</th>
<th>Project Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Jiangsu Sword Agrochemicals Co., Ltd.</td>
<td>Annual production of 200 tons of lufenuron through catalytic hydrogenation technology</td>
</tr>
<tr>
<td>2 Zhejiang Xinning Chemical Co., Ltd.</td>
<td>Special pesticide intermediates production through catalytic hydrogenation technology</td>
</tr>
<tr>
<td>3 Shangyu Yingtai Fine Chemical Co., Ltd.</td>
<td>Efficient, safe and environmentally friendly herbicide mesotrione and flumioxazin TC production through catalytic hydrogenation technology</td>
</tr>
<tr>
<td>4 Inner Mongolia Tenglong Chemical Co., Ltd.</td>
<td>Comprehensive recycle and utilization of glyphosate waste water</td>
</tr>
<tr>
<td>5 Jiangsu Youth Chemical Co., Ltd.</td>
<td>Comprehensive recycle and utilization of thermal oxidation resources of glyphosate waste water</td>
</tr>
<tr>
<td>6 The Wynca Group</td>
<td>Production of 40,000 tons of sodium phosphate through comprehensive utilization of glyphosate waste water</td>
</tr>
<tr>
<td>7 Lier Chemical Co., Ltd.</td>
<td>Clean production project of annual output of 1,200 tons of herbicide clomopyralid through electrolytic synthesis</td>
</tr>
<tr>
<td>8 Anhui Redsun Biochemical Co., Ltd.</td>
<td>New project of annual output of 43,000 tons of chlorinated pyridine</td>
</tr>
<tr>
<td>9 Weifang Xinxing Chemical Co., Ltd.</td>
<td>Project of annual output of 43,000 tons of chlorinated pyridine</td>
</tr>
<tr>
<td>10 Hunan Haili Chemical Industry Co., Ltd.</td>
<td>Demonstration project for green production of chlo rochloromethylthiazone</td>
</tr>
</tbody>
</table>
The Agrochemical Industry Closing up with Slowdown in 2015 and will Maintain Low in 2016

According to the China Crop Protection Industry Association (CCPIA), the China Agrochemical Price Index (CAPI) of December is 72.68, which dropped by 2.40% compared with that of November and 17.51% compared with December 2014. Figure 1 shows the price indexes of different major pesticide varieties. Telling from Figure 1, the CAPI of 2015 presents an overall downward trend. The CAPIs of January, March and April are quite high, all exceeding 84.0. Coming to the fourth quarter, under the circumstances of overcapacity and weak demand, most of the enterprises operated under their productive capacity. Especially near the end of the year, enterprises expressed concern for market development trend in the new year and most of them were just completing previous orders, so the CAPIs of the last three months reached a new low, falling under 75.0.

In December, the weighted transaction price of glyphosate TC reached 17,400 RMB/ton, a decrease of 5.95% compared with that of December in 2014. Falling below the cost, it reached the lowest value of 2015 which was also the lowest value since 2007. Currently, most of the glyphosate TC manufacturers have already been under the bottom line. Under enormous pressure from both production and management, manufacturers of small and medium capacity have halted production. Some of the manufacturers are operating only to maintain production. The glyphosate market in 2016 is expected to remain in the adjustment period.

According to Figure 1, the herbicide's index ranged between 62.5 and 78.5 and had always stayed at the lowest level among the pesticide varieties. The Index of December reached the lowest, falling to 62.71, a decrease of 5.20% compared with that of last year. The transaction price of most herbicide TCs fell sharply in December. The transaction prices of 2,4-D, paraquat, glyphosate, butachlor, acetochlor•atrazine and other herbicides all fell by 4% or more, which brought down the total herbicide's Index by 3.45%.

Figure 2 which shows the price index changes of glyphosate during the past three years, the overall market price of glyphosate in 2015 didn't fluctuate too much compared with the high prices of 2013 and 2014. The price of glyphosate in 2015 stayed along the cost line, ranging between 17,000 and 22,000 yuan/ton. The price index ranged between 54.0 and 63.6.

In December, the weighted transaction price of herbicides all fell by 4% or more, which brought down the total herbicide's Index by 3.45% compared with that of November. Operating rate of the enterprises is quite low. The market transactions and sales mainly relied on previous orders. The herbicides' Index is expected to remain in the adjustment period, with little change from the previous month.

The insecticide's Index in 2015 as a whole maintained within the range between 96.0 and 100.1. The insecticide's Index in March reached the highest value of 96.01, while the fungicide's Index of June reached the highest of 100.06. The fungicide's Index is 97.95, a decrease of 0.58% compared with November and a decrease of 2.25% compared with last December. Among fungicide products, the transaction prices of mancozeb, thiophanate-methyl, kresoxim-methyl, propiconazole and other TC products have respectively dropped slightly by 6.58%, 2.23%, 1.91% and 0.45%, which brought down the total fungicide's Index by 0.89%; the transaction prices of other fungicides products remained basically stable with little change from the previous month.

The insecticide's Index declined in 2015 generally speaking, ranging between 72.4 and 95.0. It reached the highest value of 95.98 in April; the overall Index of the fourth quarter was low and it reached the lowest value of 77.42. The insecticide's Index of December reached 81.99, an increase of 1.78% compared with November and a decrease of 9.73% compared with last December. Among the insecticide products, the transaction prices of fipronil, lambda-cyhalothrin, acephate and other TC products have come down, respectively falling by 1.27%, 6.97% and 2.26% compared with November, which further brought down the CAPI of insecticides by 0.73%; the transaction prices of imidaclorpid, chlorpyrifos, profenophos, avermectin, emamectin benzoate and others increased, driving the insecticide's Index by 2.08%.

Overall, the market price of fungicides is most stable and showed least fluctuations. The fungicide's Index in 2015 was 97.95, a decrease of 0.58% compared with November and a decrease of 2.25% compared with last December. Among fungicide products, the transaction prices of mancozeb, thiophanate-methyl, kresoxim-methyl, propiconazole and other TC products have respectively dropped slightly by 6.58%, 2.23%, 1.91% and 0.45%, which brought down the total fungicide's Index by 0.89%; the transaction prices of other fungicides products remained basically stable with little change from the previous month.

---

**Table 1:**

<table>
<thead>
<tr>
<th>Category</th>
<th>Dec. 2015</th>
<th>Nov. (%)</th>
<th>Dec. 2014 (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pesticide</td>
<td>72.68</td>
<td>-2.40</td>
<td>17.51</td>
</tr>
<tr>
<td>Herbicide</td>
<td>62.71</td>
<td>5.20</td>
<td>25.20</td>
</tr>
<tr>
<td>Insecticide</td>
<td>81.99</td>
<td>1.78</td>
<td>9.73</td>
</tr>
<tr>
<td>Fungicide</td>
<td>97.95</td>
<td>0.58</td>
<td>2.25</td>
</tr>
</tbody>
</table>
First silthiofam technical registration obtained by domestic company in China

Recently Chinese agrochemical company Shijiazhuang Xingbai Bioengineering has approved 98% silthiofam technical registration form ICAMA(Institute for the Control of Agrochemicals, MOA), with expiration date of 17 Dec, 2020. The registration makes Shijiazhuang Xingbai the first domestic company in China obtaining silthiofam technical registration. Monsanto has been approved registration of 97.7% silthiofam technical and 125g/L SC before, for the control of full rot in winter wheat.

Silthiofam was developed by Monsanto targeted full rot in wheat, barley and triticale. The active ingredient has been approved in many countries including UK, Belgium, Czech Republic, Germany, etc., with its global sales around $20 million. Its patent protection has just been expired in 13 Nov, 2015 in China.

Top 30 Exporting Companies of China Agrochemical

With the rapid development of China crop protection industry in the past 30 years, China has become a major manufacturer and exporter all over the world. In 2014, China agrochemical production has reached to 3,744,000 tons, of which export volume contributed to 1,642,000 tons. Sincerely speaking, around 70% of global pesticide technical is produced in China and exports to more than 180 countries every year, mainly North America, Southeast Asia, South America, Japan and Middle East.

Ever since 1994, export and import of China's pesticide has been increasing, of which export amount is growing every year, mainly North America, Southeast Asia, South America, Japan and Middle East.

Comprehensive Environmental Protection Directory (2015) Released and Four New Pesticide Products Are Added

On December 17, 2015, the Ministry of Environmental Protection issued the "Comprehensive Environmental Protection Directory (2015)". There is an addition of four pesticide products in the list of 2015, namely aluminum phosphate, chlorosulfuron, lime sulfur and ethophos. Among them, aluminum phosphate, chlorosulfuron and ethophos are products of high environmental risk, and lime sulfur is of high pollution. "The four new products of high pollution and high environmental risk" (hereinafter referred to as "two high" products) are eliminated from the list of products of export rebates and banned from processing and trade. Among the features of the "List", GHF stands for products of high pollution, and GHW for products of high environmental risk.

The comprehensive directory provides environmental protection basis for relevant national authorities to formulate and adjust related industrial, taxation, trade and other policies. China Crop Protection Industry Association (CCPIA) was commissioned by the Department of Environmental Planning of the Ministry of Environmental Protection to undertake the project of "Formulation and Study of Comprehensive Environmental Protection Directory in the Pesticide Industry". CCPIA is one of the first industry associations to prepare the directory of "two-high" products. It has actively involved in the formulation of environmental protection directory of the pesticide industry.

Comprehensive Environmental Protection Directory 2015 (Pesticides)

<table>
<thead>
<tr>
<th>No.</th>
<th>Features Products</th>
<th>Product Name</th>
<th>Product Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>GHF/GHF 2,4-dichlorophenoxyacetic acid</td>
<td>2,4-D</td>
<td>2601010000</td>
</tr>
<tr>
<td>2</td>
<td>GHF 2,4-dichlorophenoxyacetate</td>
<td>2,4-D</td>
<td>2601010001</td>
</tr>
<tr>
<td>3</td>
<td>GHF glyphosate</td>
<td>Glyphosate</td>
<td>2601010002</td>
</tr>
<tr>
<td>4</td>
<td>GHF glufosinate sodium</td>
<td>Glufosinate sodium</td>
<td>2601010003</td>
</tr>
<tr>
<td>5</td>
<td>GHF glufosinate methylsulfate</td>
<td>Glufosinate methylsulfate</td>
<td>2601010004</td>
</tr>
<tr>
<td>6</td>
<td>GHF glufosinate</td>
<td>Glufosinate</td>
<td>2601010005</td>
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<td>7</td>
<td>GHF glufosinate</td>
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-15-
China Became Bolivia’s Largest Importer of Agrochemicals

According to a report from the Bolivian Institute of Foreign Trade (IBCE), the data from the Bolivian National Institute of Statistics (INE) shows that the import value of agrochemicals in Bolivia in 2014 was USD242 million and the import volume was 40,900 tons. The import value of agrochemicals from China were USD 79.02 million, accounting for 33%; Argentina were USD50.54 million, accounting for 21%; Brazil were USD33.5 million, accounting for 14%. Other importing countries of agrochemicals were Paraguay (USD18.63 million), Uruguay (USD17.23 million), France (USD12.97 million), the United States (USD5.87), Columbia (USD5.06 million), Peru (USD4.91 million), Switzerland (USD2.89 million). The import value of herbicides was USD95 million; fungicides was USD83 million and insecticides was USD64 million.

In the first half of 2015, Bolivia’s agrochemical imports reached USD94 million, and the import volume was 16,000 tons. Between 2007 and 2014, Bolivia’s agrochemical import was 1.237 billion RMB and the import volume was 228,000 tons. In 2014, the import value of agrochemicals reached a history record high. During the eight years, the import volume of agrochemicals increased significantly by five times, which was mainly driven by the import of fungicides that increased 20-fold.

Seed Treatment Becomes New Highlight

Countries across the world have introduced regulatory laws to restrict the use of chemical pesticides in the aim of enhancing consumers’ awareness of pesticide residues. These measures have increased the demand for seed treatment agents worldwide.

In 2015, the sales of seed treatment agents in China reached 2.86 billion RMB, an increase of 16.7% compared with the year of 2014. It is expected that the sales of seed treatment agents in 2016 will reach 3.5 billion RMB and exceed 5 billion RMB in 2019. In China, it is analyzed that seed treatment agents applied on wheat, corn, cotton, etc., respectively account for 38%, 32%, 16% of the total; and seed treatment agents applied on rice, soybean, peanut, and other crops respectively account for 5%, 4% and 4% of the total.
Overview of Newly Listed Agrochemical Companies in 2015

01 Shandong Luba Landed on the New Third Board
On April 23, 2015, Zhejiang Xinnong Chemical Co., Ltd. ("Xinnong") went public on the National Equities Exchange and Quotations ("NEEQ," commonly known as the "New Third Board") for public transfer of its shares. The amount of shares issued is 153 million.

Currently, Luba owns nine patents, including two patents for invention and seven patents for utility models. Luba also has 96 Agrochemical Registration Certificates issued by the Ministry of Agriculture, including paraquat, diquat, haloxyfop-R-methyl, fluoroxypry-methyl and cyhalofop-butyl.

02 Nutrichem Landed on the New Third Board
On October 20, 2015, Beijing Nutrichem Company Limited ("Nutrichem") was approved to be listed on the New Third Board after Anhui Jiuyi Agriculture Co., Ltd. ("Luba") and Jiangsu Flag Chemical Industry Co., Ltd. and was listed on the National Equities Exchange and Quotations ("NEEQ," commonly known as the "New Third Board") for public transfer of its shares. The amount of shares issued is 40 million.

According to the data from Wabei NEEQ Research Institute, Nutrichem was established in July 2005 and is mainly engaged in the R&D, production and sales of agrochemical technical and formulations. Nutrichem’s featured products include oxyfluorfen, fluroxypyr-mepthyl and cyhalofop-butyl.

03 Zhejiang Xinnong Landed on the New Third Board
On April 23, 2015, Zhejiang Xinnong Chemical Co., Ltd. ("Xinnong") went public on the National Equities Exchange and Quotations Co., Ltd. ("HDF", formally known as XCFD) (stock code: 832940) was listed on the National Equities Exchange and Quotations ("NEEQ," commonly known as the "New Third Board") on July 27, 2015.

The establishment of HDF has been committed to the manufacturing of agrochemical technical and formulations and fine chemicals. HDF’s featured products are glyphosate technical and 41% of glyphosate IPA salt SL. In 2014, the company had an operation revenue of 315 million RMB and a net profit of 36.973 million RMB. The sales revenue of glyphosate technical and formulations accounted for 76.24% of HDF’s revenue. Most of HDF’s glyphosate technical is directly sold to other agrochemical companies, which process would be into formulations. In recent two years HDF’s direct clients include Wynca Group and Zhenjiang Jiangnan Chemical Co., Ltd. A small part of HDF’s glyphosate technical is processed into formulations.

04 Jiangxi Xinlong Landed on the New Third Board
On August 14, 2015, the listing ceremony on the "New Third Board" of Jiangxi Xinlong Biochemical Technology Co., Ltd. ("Xinlong"), the first insect virus insecticide manufacturer in China, was held in National Equities Exchange and Quotations Co., Ltd. in Beijing.

Xinlong, established jointly with Wuhan Institute of Virology of the Chinese Academy of Sciences in March 2011, is a technological-innovation-based enterprise that combines research & development, manufacturing, sales, promotion and service of biopesticides, bio-organic fertilizers, biophysical control technology, green prevention and control products.

05 HDF Landed on the New Third Board
With the approval of National Equities Exchange and Quotations Co., Ltd., Henan HDF Chemical Company, Ltd. ("HDF", formally known as XCFD) (stock code: 832940) was listed on the National Equities Exchange and Quotations ("NEEQ," commonly known as the "New Third Board") on July 27, 2015.

The establishment of HDF has been committed to the manufacturing of agrochemical technical and formulations and fine chemicals. HDF’s featured products are glyphosate technical and 41% of glyphosate IPA salt SL. In 2014, the company had an operation revenue of 315 million RMB and a net profit of 36.973 million RMB. The sales revenue of glyphosate technical and formulations accounted for 76.24% of HDF’s revenue. Most of HDF’s glyphosate technical is directly sold to other agrochemical companies, which process would be into formulations. In recent two years HDF’s direct clients include Wynca Group and Zhenjiang Jiangnan Chemical Co., Ltd. A small part of HDF’s glyphosate technical is processed into formulations.

06 Ningxia Soochow Listed on the New Third Board
When talking about the Xinnong’s plan in the coming year, Xinnong’s Deputy General Manager Fan Kun said that Xinnong would focus on the promotion of Zinc thiozole series products such as Bisheng (20% Zinc thiozole SC), Bye (50% azoxystrobin•Zinc thiozole SC), Bisan (40% penconazole•Zinc thiozole SC) and Byuwe (40% kasugamycin•Zinc thiozole SC) in the South China market.

07 Jiangxi Heyi Listed on the New Third Board
On November 27, 2015, Jiangxi Heyi Chemicals Co., Ltd. ("Heyi") announced that it was approved to be listed on the National Equities Exchange and Quotations ("NEEQ," commonly known as the "New Third Board") for transfer of shares by agreement. Currently, Heyi’s two big corporate shareholders are Beijing Nutrichem Company Limited and Shenzhen Noposion Agrochemical Co., Ltd. Respectively, these two big corporations own 33.32% and 20.00% of Heyi’s shares.

Heyi mainly engages in the research and development, manufacturing and sales of agrochemical technical, intermediates and formulations. Heyi’s main products include ethirimol, dithianon, cyromazine, Cupravit, iprodione, dimethachlon, procymidone, sulfentrazone, 3,5-Dichlorobenzenamine and 3,4-Dichlorotrifluorotoluene. Heyi is the only registered pesticide manufacturer of ethirimol in China.
Hubei Sanonda Commissioned ADAMA to Sell Its Formulations

Hubei Sanonda Co., Ltd. released on December 26 2015 that it plans to sign the "Agreement on Exclusive Agent of Pesticide Formulations" with ADAMA Agricultural Solutions Ltd. (Beijing). After signing the agreement, Sanonda will commission ADAMA to sell or distribute its pesticide formulations as the exclusive agent starting from January 1, 2016. Sanonda’s domestic formulation sale team will be dissolved.

Except for two kinds of products (80% mancozeb WP and 1.8% avermectin EC (“distribution products”) that Sanonda has no sales, other products are sold on a commission basis. The retail prices are fixed by Sanonda, and ADAMA only charges the actual selling expenses.

From January 1, 2016, 80% of mancozeb WP and 1.8% of avermectin EC (distribution products) first were distributed by ADAMA as the sole agent. Except for the distribution products included in the Agreement, other formulations registered by Sanonda will be sold by ADAMA as the exclusive agent from January 1, 2016 to December 31, 2016. After the expiration of the Agreement, both sides will re-negotiate the cooperation modes.

Shenyang Sciencreat Chemicals’ Yizuomanjing Received First Registration Approval

From 18th to 19th December 2015, two Yizuomanjing products discovered by Shenyang Sciencreat Chemicals Co., Ltd. received temporary registration approval. The two products are respectively 98% Yizuomanjing TC and 30% Yizuomanjing SC (registration of application on preventing cotton and apple spider mite). Both products are low of toxicity.

According to the results of pesticide effect tests, 30% Yizuomanjing SC is effective in controlling apple spider mites. Seven days after the application, 82.17% to 100% of the total spider mites are controlled. The fast effect has last about 14 days. It is recommended that the pesticide should be applied during the early stage of the rampant period with recommended concentration of 50~100 mg/kg. In terms of controlling cotton spider mite, ten days after the application, 99.3%~100% of the total spider mites are controlled. It brings no harm to the growth of cotton and is as effective as avermectin. It is fast and effective in controlling the pests and the effect lasts more than 10 days. 30% Yizuomanjing SC should be applied during the early stage of the rampant period of the pests with recommended concentration of 22.5~45 g a.i./hm². The pesticide should be evenly sprayed on both sides of the leaves.

It is known that 30% Yizuomanjing SC has received certificate of approval for doing field trials against citrus spider mites (SY20140529).

China Develops Novel Pesticide Again

Central China Normal University developed its own novel pesticide variety Fobenixinian. The University transferred the pesticide to Beijing Yanhua Yolo Biotech Co., Ltd. to further develop it for industrialization.

Fobenixinian (Code Name: Y131149 ) is a new class of succinate dehydrogenase inhibitors (SDHI) with superior control effect on rice sheath blight and high fungicidal activity on combating powdery mildew and potato late blight. This product is featured by being systemic, rainfast, and low in both dosage (5-7 g/mu) and cost (<200,000 t/a). It is distinctly superior to thifluzamide, another product of its kind, in terms of both control effect and cost. Its application numbers of China patent and international patent are 201310502473.7 and PCT/CN2013/089220 respectively.
Hubei Xingfa Chemicals’ Glyphosate Project

Hubei Xingfa Chemicals Group recently expressed that its production project of 60,000 t/a glyphosate has been put into pre-production stage.

According to the Xingfa Chemicals, Taisheng Co Ltd., a subsidiary of Xingfa Group is one of the four companies that passed through the environmental reviews for glyphosate production in China. Taisheng’s environmental protection technologies and its level of comprehensive utilization of resources are at the leading edge in the industry. Taisheng mainly produces glyphosate, dimethoxymethane, phosphorous acid and methyl chloride with main raw materials of yellow phosphorus, chlorine and glycine.

Xingfa Chemicals expressed that after the completion of the project, it would possess glyphosate of 130,000 t/a. Though the glyphosate market is stagnant, but relying on the company’s industrial chain of circular economy and the overall cost advantages, glyphosate will still be able to contribute to the company’s performance.

Industry Grand Ceremony of Glorious Blossom – Opening Ceremony of the 15th National Agrochemical Exchange Meeting & Agrochemical Product Expo

On the morning of October 28th, the 15th National Agrochemical Exchange Meeting & Agrochemical Product Expo began at the Shanghai World Expo Exhibition Center. Li Zhonghua, general secretary of CCPIA, host the opening ceremony.

First, Sun Shubao, chairman of CCPIA, delivered a welcome speech. AgroChemEx covered an exhibition area of 33,500 m² with 573 domestic and overseas exhibitors attending, including over 30 foreign exhibitors from America, Germany, Brazil, Australia, Nigeria, Japan, Malaysia and India. Foreign purchasing agents from more than 80 countries and 1000 regions would attend for visiting and negotiating and more than 25,000 domestic and overseas audiences were expected to participate. Meanwhile, nearly ten distinctive theme meetings and industrial forums were also held to summarize the development, changes and impacts of agrochemical industry last year from different perspectives.

Using this opportunity of gathering professionals and pooling agrochemical products and services, Sun Shubao wished to further enhance the status and influence of Chinese agrochemical industry in global agrochemical manufacturing, as well as promote the development and integration of China pesticide industry and global agrochemical industry.
CCPIA NEWS

Developing by Innovation
-The 10th International Conference on Crop Protection
(Sponsored by CAC Group)

On October 28th, the 10th International Conference on Crop Protection (Sponsored by CAC Group) hosted by CCPIA convened successfully in Shanghai. This conference was hosted by Cao Chengyu, Deputy Secretary of CCPIA and Qi Yiqun, Vice President of CAC Group Co., Ltd. with over 250 people participating. Xie Simian, president of CAC Group Co., Ltd. firstly made a speech and extended congratulations to the opening of this conference.

The limited formulation of pesticide type and quantity is the No.1 bottleneck that restricts the development of Chinese pesticide. During the period of the 12th Five-Year Plan, capability of independent innovation and technological level of industry have constantly enhanced.

Firstly, the conference reviewed the achievements our pesticide innovation made during the period of the 12th Five-Year Plan.

Secondly, the conference introduced a new pesticide innovation research method named intermediate derivatization method, which is suited for our national conditions, pointing out that the R&D of new pesticide faces with huge difficulties and low success rate, and pesticide innovation is actually science of trial and error.

Thirdly, the conference focused on the risk evaluation and management requirement of pesticide environment, and environmental risks of exploring secondary compounds by cases. The products development of enterprises needs basic data of technical materials while preparations need basic ecological data. For recent years, the number of field trial permit in China has constantly increased, reaching the highest record of 5,467 in 2014. In addition, the product structure of pesticide field trial in China has a tendency towards equilibrium featured with concentrated applications of overdue patent product trials and equal shares of leading variety and secondary variety.

Finally, Martin Clark, former responsible officers of global quality in Dowagro and HSE, elaborated for enterprises how to identify and control risks, as well as evaluate subsequent effects. Martin mentioned that the known risks should be eliminated as possible, or be taken measures to lower the risks in order to have capacity to control when risks happened.

On September 23, 2015, the preparatory meeting of the Phorate Self-discipline Working Group set up by China Crop Protection Industry Association (CCPIA) was held in Jinzhou, Liaoning. The goal of the Phorate Self-discipline Working Group is to guide farmers to use pesticides in a safe and scientific way and to develop more non-crop chemicals.

As a high-toxic pesticide, phorate has always been the focus of pesticide regulation. In China, the Ministry of Industry and Information Technology issued a notice in 2011. According to the notice that the Ministry would no longer accept corporate applications for production approval certificates of 22 pesticides including phorate since January 12, 2012 and it would no longer issue production approval certificates for the foregoing pesticides.

In the Comprehensive Directory for Environmental Protection (2013 Edition) that the Ministry of Environmental Protection provided to 13 ministries and organizations including the National Development and Reform Commission, the Ministry of Industry and Information Technology, the Ministry of Finance, the Ministry of Commerce and the People's Bank of China, phorate is classified as a product with high environmental risk and pollution.

Li Zhonghua, Secretary General of CCPIA, said that high-toxic pesticides are not allowed to be used in food according to the national food safety law. Currently, many high-toxic pesticides, including phorate, have been removed from the registration for being used on fresh agricultural products such as vegetables, fruits, Chinese medicinal crops and tea leaves. Since 2018, the registration of phorate will be cancelled; and since 2020, the use of phorate will be banned nationwide. The original intension of CCPIA to set up the Phorate Self-discipline Working Group is to advise pesticide companies to solve the environmental problems, especially the smell that arises during the production of phorate, and reduce adverse impacts to the society. Also the original intension requires pesticide companies to take on the responsibility of guiding and training farmers in order to use pesticides in a safe and scientific way. By doing so, the companies can prolong the life cycles of pesticides. Phorate, as an insecticide, has many other uses, including those in the non-agricultural fields that are worth developing.

At the meeting, Meng Fanwu, Chairman of Jinzhou Shuofeng Pesticide Group Co., Ltd. severed as the head of the Phorate Self-discipline Working Group. Jinzhou Shuofeng Pesticide Group Co., Ltd. was elected as the head unit of the Working Group, and Hebei Haoyang Chemical Co., Ltd. as the deputy head unit. The secretariat set in CCPIA, Liaoning Crop Protection Industry Association and Tianjin Crop Protection Industry Association participated in the work of the secretariat of the Working Group. All the representatives who presented at the meeting reviewed and passed the Convention of the Phorate Self-discipline Working Group.
China Agrochemicals
Market Analysis Report

News, Policy and Regulations
In-depth Analysis Report
Agrochemical Development Trend
Chinese Manufacturers’ Information
Price & Trade Analysis
New Projects of Agrochemical Industry
98+ Kinds of Products Research

Established in April, 1984, China Crop Protection Industry Association (CCPIA) is a nonprofitable 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.

Annual Market Report

These Annual market reports on Chinese agrochemicals covers production, market profile (capacity, production, sales and price trend & forecast), trade situation (analysis of export data and impact factors), latest policy & regulation in China. Meanwhile, we can provide important single pesticide product market reports.

Annual China Agrochemical Industrial Development Report

+ Annual Report on Glyphosate
+ Report on Paraquat
+ Annual Report on Atrazine
+ Annual Report on 2,4-D
+ Annual Report on Triazine
+ Annual Report on Imidacloprid
+ Annual Report on Chlorsulfuron
+ Annual Report on Acetamiprid
+ Annual Report on Pyrimethanil
+ Annual Report on Pyrimethanil
+ Annual Report on Chlorothalonil
+ Annual Report on Carbofuran
+ Annual Report on Mancozeb
+ 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:

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