Overseas Market Analysis Report

Mongolia Pesticide Overseas Market Analysis Report

 Target Country: Mongolia Main Category: Pesticides Report Update Date: July 20, 2026

Mongolia Pesticide Key Conclusions

Mongolia's pesticide market is almost entirely import-dependent, with Chinese supplies accounting for over 75%. Total imports reached approximately 2,800 tonnes in 2025, dominated by herbicides. China's technical material prices stabilized in H1 2026, and Mongolia's landed costs followed suit. The key risks lie in tugrik exchange rate volatility and inland transport bottlenecks, while Mongolia's agricultural expansion policies underpin demand growth.

- Import dependency: ~98% (no large-scale local production)
- China supply share: 75%-80% (2025 customs data)
- 2025 total imports: approx. 2,800 tonnes , value ~USD 21 million
- Glyphosate technical FOB China: ~CNY 27,500/tonne (Jun 2026) ↓3.5%

Sources: General Administration of Customs of China, June 2026 trade statistics; SunSirs, July 2026 pesticide price monitor; National Statistics Office of Mongolia, 2025 annual report

Supply and Demand Fundamentals

Mongolia's pesticide sector is characterized by zero domestic production and full import reliance. Domestic consumption in 2025 was around 2,750 tonnes, entirely met by imports. Expanding wheat acreage is driving steady herbicide demand, while increased potato and vegetable cultivation is pushing up fungicide usage.

Indicator	2024	2025	YoY Change
Domestic Production (tonnes)	0	0	—
Imports (tonnes)	~2,650	~2,800	+5.7%
Exports (tonnes)	0	0	—
Apparent Consumption (tonnes)	~2,600	~2,750	+5.8%

- Main consumption areas: wheat field weed control (~55%), potato/vegetable protection (~25%), other crops (~20%)

Sources: National Statistics Office of Mongolia, 2025 Agricultural Trade Yearbook; FAO STAT Pesticide Use Database 2025 (updated Mar 2026)

China Market Status

In Q2 2026, China's pesticide technical material capacity remained ample, with prices for mainstream actives such as glyphosate and imidacloprid stable to slightly weaker. Industry operating rates were maintained at 65%-72%, and export competition was intense. Exports to Mongolia mainly consist of small/medium-pack formulations, with the Erenhot port channel flowing smoothly.

- Glyphosate 95% technical FOB: ~CNY 27,500/tonne (Jun 2026, SunSirs) ↓3.5% YoY
- Imidacloprid 95% technical FOB: ~CNY 86,000/tonne (Jun 2026) ↓2.2%

- Average pesticide industry operating rate: ~68% (Q2 2026, OilChem China)
- 2025 China pesticide exports to Mongolia: approx. USD 16 million (HS chapter 38)

Sources: SunSirs, July 2026 pesticide price express; OilChem, Q2 2026 pesticide industry performance report; General Administration of Customs of China, 2025 annual trade statistics

Mongolia Market Status

Retail pesticide prices in Mongolia carry a premium of about 20%-30% over China FOB levels, reflecting transport and distribution costs. Main source countries are China (~78%), Russia (~12%), and others (~10%). Consumption is concentrated in agricultural heartlands such as Selenge and Töv provinces.

- Glyphosate 41% IPA salt retail price in Ulaanbaatar: approx. 38,000–42,000 MNT/L (~CNY 78–86/L)
- Import share by origin: China 78% , Russia 12% , India/Europe etc. 10%
- CIF Ulaanbaatar premium over FOB China: ~15%–22%

Sources: National Statistics Office of Mongolia, 2025 import trade data; Ministry of Food, Agriculture and Light Industry of Mongolia, Q1 2026 market monitoring report

Product Segment Structure

Herbicides account for over 55% of Mongolia's pesticide imports by volume, with glyphosate and 2,4-D being the largest single products. Insecticides are led by imidacloprid and lambda-cyhalothrin, while fungicide demand is growing steadily alongside potato acreage expansion.

Sub-category	Import Share	Representative Varieties	Demand Trend
Herbicides	~56%	Glyphosate, 2,4-D	Steady growth
Insecticides	~27%	Imidacloprid, Lambda-cyhalothrin	Moderate growth
Fungicides	~14%	Carbendazim, Chlorothalonil	Rapid growth
Others	~3%	Plant growth regulators, etc.	Generally stable

Sources: General Administration of Customs of China, HS3808 sub-category data 2025; National Statistics Office of Mongolia, 2025 import commodity classification statistics

Supply and Demand of Key Finished Products

Glyphosate 41% IPA salt formulation is the largest single item in the Mongolian market, with annual imports of approximately 800–900 tonnes. The decline in China's technical prices in Q2 2026 led to slightly lower landed costs in Mongolia, while inventories remained low.

- Glyphosate 41% formulation annual imports: approx. 850 tonnes (2025), ~54% of herbicide imports
- CIF Ulaanbaatar price: approx. USD 3,200–3,500/tonne (Jun 2026) ↓4%
- 2,4-D formulation annual imports: approx. 320 tonnes , stable demand
- Mongolia inventory cycle: ~45–60 days , maintaining low levels

Sources: SunSirs, July 2026 pesticide import/export monitor; National Statistics Office of Mongolia, 2025 trade data; OilChem, Q2 2026 pesticide market analysis

Intermediates and Raw Material Values

China's pesticide technical prices directly influence Mongolia's import costs. In H1 2026, prices of key intermediates such as glycine and dimethyl phosphite remained stable, keeping glyphosate technical production costs under control. Mongolian importers tend to prefer Chinese formulations rather than technical materials.

- Glycine (glyphosate intermediate): ~CNY 10,500/tonne (Jun 2026, ex-works East China)
- Glyphosate technical FOB China: ~CNY 27,500/tonne → CIF Mongolia approx. CNY 32,000–33,500/tonne
- Imidacloprid technical FOB China: ~CNY 86,000/tonne → CIF Mongolia approx. CNY 100,000–105,000/tonne
- Cost transmission lag: China price changes reach Mongolia retail in approx. 4–6 weeks

Sources: SunSirs, July 2026 chemical raw material price monitor; OilChem, Q2 2026 pesticide technical cost analysis

Trade and Macro Indicators

Mongolia's GDP grew about 5.2% in 2025, with agriculture contributing around 12%. The tugrik depreciated slightly against the renminbi in H1 2026, raising import costs. Improved clearance efficiency at the China-Mongolia Erenhot port is beneficial for pesticide trade.

Indicator	Value	Data Date
Mongolia GDP Growth Rate	~5.2%	Full year 2025
Agriculture Share of GDP	~12.1%	2025
MNT/CNY Exchange Rate	~485 MNT/CNY	July 2026
China Pesticide Exports to Mongolia	~USD 16 million	2025

- Mongolia pesticide import tariff: 5% (MFN rate), VAT 10%

Sources: World Bank, June 2026 Mongolia Economic Brief; Bank of Mongolia, July 2026 exchange rate bulletin; General Administration of Customs of China, 2025 trade statistics

Risk and Opportunity Windows

Tugrik depreciation ⚠ Risk pushes up import costs, and inland transportation has bottlenecks relying on the China-Mongolia railway corridor. However, Mongolia's "grain self-sufficiency" policy drives agricultural input demand, and Chinese pesticide companies can leverage the Erenhot port advantage to expand market share.

- ⚠ Currency risk: The tugrik depreciated 3.2% against the CNY in H1 2026, directly inflating import costs
- ⚠ Supply chain risk: As a landlocked country, Mongolia heavily depends on the Tianjin Port → Erenhot → Ulaanbaatar railway corridor
- □ Policy opportunity: The "Grain Self-Sufficiency 2030" plan is expanding wheat acreage, benefiting herbicide demand
- □ Cooperation opportunity: Progress in the China-Mongolia border economic cooperation zone is likely to facilitate cross-border pesticide trade

Sources: Ministry of Food, Agriculture and Light Industry of Mongolia, 2026 policy white paper; World Bank, June 2026 Mongolia risk assessment; Ministry of Commerce of China, 2026 China-Mongolia economic and trade cooperation brief

Data Source Summary

- General Administration of Customs of China — 2025 annual and 2026 monthly trade statistics (HS3808 pesticide import/export data)
- National Statistics Office of Mongolia — 2025 agricultural trade yearbook and import commodity classification statistics
- SunSirs — July 2026 pesticide price express and chemical raw material price monitor
- OilChem (Zhuochuang Information) — Q2 2026 pesticide industry performance report and technical cost analysis
- World Bank — June 2026 Mongolia Economic Brief and risk assessment report
- Bank of Mongolia — July 2026 exchange rate bulletin
- FAO STAT — 2025 pesticide use database (updated March 2026)
- Ministry of Food, Agriculture and Light Industry of Mongolia — Q1 2026 market monitoring report and policy white paper
- Ministry of Commerce of China — 2026 China-Mongolia economic and trade cooperation brief