
**Report on Analysis
of China's Seed (Seedling)
Trade & Import and Export Enterprises**



Beijing Shennong Kexin Agribusiness Consulting Co. Ltd.

June 2009

Research Background

China is an important agricultural country. Its annual seed usage amounts are over 12 billion kg and in 2008 market capacity exceeded 55 billion RMB.

This huge market potential has made China's seed industry an ever-important focus of attention from capital investors & large international seed corporations. The seed industry contains huge opportunities for investment and an enormous merger along with market development & foreign investment opening up.

This report makes a detailed analysis focused on China's seed (Seedling) trade & Import and Export Enterprises. The report consists of a various of different seed types divided into 5 categories as follows:

1. Grains (wheat, rice, corn & Potato etc), cotton and oil-bearing crops (soybean, peanut, sunflower)
2. Vegetables and melons
3. Flower species and nursery stock
4. Pasturage and lawn
5. Other Seed

The main content of this report includes:

1. Import and Export Trade Policies for China's Seed
2. Current Status and Change Characteristics of the Import and Export Trade of Various Seed
3. Analysis of Key Importers and Exporters of Various Seed
4. Forecast of Import and Export Trends of China's Seed from 2009-2010.

This report was completed in June 2009. We hope that it may be of help to you in your work.

TABLE OF CONTENTS

Research Background.....	I
Chapter One Current Status of China's Seed Industry Development.....	1
1.1 Overview of Global Seed Industry Development	1
1.2 Overview of China's Seed Industry Development.....	2
1.2.1 History of China's Seed Industry Development.....	2
1.2.2 Main Features of China's Seed Industry	2
1.2.3 Segmentation of China's Seed Market	3
1.3 Summary of Import & Export of China's Seed.....	3
1.3.1 Overall Situation of Import & Export of China's Seed	3
1.3.2 Changes and Structure of China's Seed Import	4
1.3.3 Changes and Structure of China's Seed Export	5
Chapter Two Macro Policies and Regulation.....	6
2.1 Main Seed Industry Policies in China.....	6
2.2 Impact of the "Seed Law" on the Seed Industry	6
2.3 Management Regulations for Import & Export of China's Seed	7
2.4 Tariff Policies for Import & Export of Various Seed in China.....	8
Chapter Three Analysis of Import & Export of Grain, Cotton and Oil-Bearing Crops	9
3.1 Analysis of Import & Export of Corn Seed	9
3.1.1 Characteristics of Import and Export of Corn Seed	9
3.1.2 Import and Export of Corn Seed by Country	10
3.1.3 Main Importers and Exporters of Corn Seed	12
3.2 Analysis of Export of Rice Seed	12
3.2.1 Characteristics of Import and Export of Rice Seed.....	12
3.2.2 Export of Rice Seed by Country.....	13
3.2.3 Main Exporters of Rice Seed	14
3.3 Analysis of Import of Sunflower Seed	15
3.3.1 Characteristics of Import of Sunflower Seed	15
3.3.2 Import of Sunflower Seed by Country	15
3.3.3 Main Importers of Sunflower Seed	16
3.4 Analysis of Import & Export of Pea Seed	16

3.5 Analysis of Import & Export of Potato Seed	17
3.6 Analysis of Import & Export of Cotton Seed	18
Chapter Four Analysis of Import & Export of Vegetable and Melon Seed.....	19
4.1 Analysis of Import & Export of Vegetable Seed	20
4.1.1 Characteristics of Import and Export of Vegetable Seed.....	20
4.1.2 Analysis of Import of Vegetable Seed	22
4.1.2.1 Characteristics of Import of Vegetable Seed.....	22
4.1.2.2 Analysis of Import of Vegetable Seed by Original Country	23
4.1.2.3 Seasonal Characteristics of Import of Vegetable Seed	24
4.1.2.4 Analysis of Main Importers of Vegetable Seed	26
4.1.3 Analysis of Export of Vegetable Seed	29
4.1.3.1 Characteristics of Export of Vegetable Seed.....	29
4.1.3.2 Analysis of Export of Vegetable Seed by Destination Country	29
4.1.3.3 Seasonal Characteristics of Export of Vegetable Seed	31
4.1.3.4 Analysis of Main Exporters of Vegetable Seed	32
4.2 Analysis of Import & Export of Watermelon Seed	34
4.2.1 Characteristics of Import and Export of Watermelon Seed	34
4.2.2 Import & Export of Watermelon Seed by Country.....	36
4.2.3 Main Importers and Exporters of Watermelon Seed	37
4.2.3.1 Main Importers of Watermelon Seed	37
4.2.3.2 Main Exporters of Watermelon Seed	37
4.3 Analysis of Import & Export of Melon Seed.....	38
4.3.1 Characteristics of Import and Export of Melon Seed.....	38
4.3.2 Analysis of Export of Watermelon Seed.....	39
4.3.2.1 Export of Melon Seed by Country.....	39
4.3.2.2 Main Exporters of Melon Seed.....	40
Chapter Five Analysis of Import & Export of Flower Seed and Nursery Stock	41
5.1 Analysis of Import & Export Seed of Dormant Bulbs and Tubers	42
5.1.1 Characteristics of Import and Export Seed of Dormant Bulbs and Tubers	42
5.1.2 Import Seed of Dormant Bulbs and Tubers by Country.....	43
5.1.3 Main Importers of Seed of Dormant Bulbs and Tubers	43
5.2 Analysis of Import & Export of Herbaceous Flower Seed	44
5.2.1 Characteristics of Import and Export of Herbaceous Flower Seed	44

5.2.2 Import and Export of Herbaceous Flower Seed by Country	44
5.2.3 Main Importers and Exporters of Herbaceous Flower Seed.....	46
Chapter Six Analysis of Import & Export of Pasturage and Lawn Seed	47
6.1 Analysis of Import & Export of Lucerne Seed	48
6.1.1 Characteristics of Import and Export of Lucerne Seed	48
6.1.2 Export of Lucerne Seed by Country	50
6.1.3 Main Exporters of Lucerne Seed.....	50
6.2 Analysis of Import of Clover Seed	50
6.2.1 Characteristics of Import of Clover Seed	50
6.2.2 Import of Clover Seed by Country	51
6.2.3 Main Importers of Clover Seed	52
6.3 Analysis of Import of Fescue Seed	52
6.3.1 Characteristics of Import of Fescue Seed.....	52
6.3.2 Import of Fescue Seed by Country	53
6.3.3 Main Importers of Fescue Seed.....	54
6.4 Analysis of Import of Kentucky Bluegrass Seed	54
6.4.1 Characteristics of Import of Kentucky Bluegrass Seed.....	54
6.4.2 Import of Kentucky Bluegrass Seed by Country.....	55
6.4.3 Main Importers of Kentucky Bluegrass Seed.....	55
6.5 Analysis of Import of Ryegrass Seed	55
6.5.1 Characteristics of Import of Ryegrass Seed.....	55
6.5.2 Import of Ryegrass Seed by Country	56
6.5.3 Main Importers of Ryegrass Seed	57
Chapter Seven Analysis of Import & Export of Other Seed.....	58
7.1 Analysis of Import of Sugar Beet Seed	58
7.1.1 Characteristics of Import of Sugar Beet Seed	58
7.1.2 Import of Sugar Beet Seed by Country	58
7.1.3 Main Importers of Sugar Beet Seed	59
Chapter Eight Forecast of Import and Export Trade	60
8.1 Forecast of Import Trade for China's Seed	60
8.1.1 Import of China's Seed in Jan.-Apr., 2009	60
8.1.2 Forecast of China's Seed Import from 2009-2010	61

8.2 Forecast of Export Trade of China's Seed	62
8.2.1 Export of China's Seed in Jan.-Apr., 2009	62
8.2.2 Forecast of China's Seed Export from 2009-2010	62

FIGURE CONTENTS

Figure 1, Comparison of Import and Export Value of China's Seed, 2003-2008.....	4
Figure 2, Import Structure of Various Seed , 2003-2008.....	4
Figure 3, Export Structure of Various Seed, 2003-2008.....	5
Figure 4, Changes in Import and Export Volume and Value of Corn Seed, 2003-2008.....	9
Figure 5, Import and Export Prices of Corn Seed, 2003-2008.....	10
Figure 6, Proportion of Import Value of Corn Seed by Country in 2008.....	11
Figure 7, Proportion of Export Value of Corn Seed by Country in 2008.....	11
Figure 8, Changes in Export Volume of Rice Seed, 2003-2008.....	13
Figure 9, Changes in Export Value of Rice Seed, 2003-2008	13
Figure 10, Proportion of Export Value of Rice Seed by Country in 2008.....	14
Figure 11, Changes in Import and Export Volume and Value of Sunflower Seed, 2003-2008	15
Figure 12, Proportion of Export Value of Sunflower Seed by Country in 2008	16
Figure 13, Comparison of Import and Export Volume and Value of Pea Seed, 2003-2008	17
Figure 14, Comparison of Import and Export Volume and Value of Cotton Seed, 2003-2008	18
Figure 15, Structrue of Import Value of China's Seed in 2008	19
Figure 16, Structrue of Export Value of China's Seed in 2008	19
Figure 17, Comparison of Import and Export Volume and Value of Vegetable Seed, 2000-2008	20
Figure 18, Comparison of Import and Export Volume and Value of Vegetable Seed in the Main Countries in 2007	21
Figure 19, Comparison of Import and Export Prices of Vegetable Seed, 2000-2008.....	22
Figure 20, Changes in Import of Vegetable Seed, 2000-2008.....	23
Figure 21, Proportion of Import Volume of Vegetable Seed by Country in 2008	24
Figure 22, Proportion of Import Value of Vegetable Seed by Country in 2008	24
Figure 23, Import Volume of Vegetable Seed by Month, 2000-2008.....	25
Figure 24, Import Value of Vegetable Seed by Month, 2000-2008	25
Map 1, Distribution of Importers of Vegetable Seed in 2008.....	26
Figure 25, Changes in Export of Vegetable Seed, 2000-2008.....	29
Figure 26, Proportion of Export Volume of Vegetable Seed by Country in 2008	30
Figure 27, Proportion of Export Value of Vegetable Seed by Country in 2008	31

Figure 28, Export Volume of Vegetable Seed by Month, 2000-2008.....	31
Figure 29, Export Value of Vegetable Seed by Month, 2000-2008	32
Map 2, Distribution of Exporters of Vegetable Seed in 2008.....	33
Figure 30, Comparison of Import and Export Volume and Value of Watermelon Seed, 2003-2008.....	35
Figure 31, Comparison of Import and Export Price of Watermelon Seed, 2003-2008	35
Figure 32, Proportion of Export Value of Watermelon Seed by Country in 2008.....	36
Figure 33, Proportion of Import Value of Watermelon Seed by Country in 2008.....	37
Figure 34, Comparison of Import and Export Volume and Value of Melon Seed, 2003-2008	38
Figure 35, Comparison of Import and Export Price of Melon Seed, 2003-2008	39
Figure 36, Proportion of Export Value of Melon Seed by Country in 2008.....	39
Figure 37, Structure of Import Value of China's Seed in 2008	41
Figure 38, Structure of Export Value of China's Seed in 2008	42
Figure 39, Comparison of Import and Export Volume and Value of Seed of Dormant Bulbs and Tubers , 2003-2008.....	43
Figure 40, Comparison of Import and Export Volume and Value of Herbaceous Flower Seed, 2003-2008	44
Figure 41, Proportion of Import Value of Herbaceous Flower Seed by Country in 2008.....	45
Figure 42, Proportion of Export Value of Herbaceous Flower Seed by Country in 2008.....	46
Figure 43, Structure of Import Value of China's Seed in 2008	47
Figure 44, Structure of Export Value of China's Seed in 2008	48
Figure 45, Comparison of Import and Export Volume and Value of Lucerne Seed, 2003-2008... ..	49
Figure 46, Comparison of Import and Export Price of Lucerne Seed, 2003-2008.....	49
Figure 47, Comparison of Import Volume and Value of Clover Seed, 2003-2008.....	51
Figure 48, Proportion of Import Value of Clover Seed by Country in 2008	52
Figure 49, Comparison of Import Volume and Value of Fescue Seed, 2003-2008	53
Figure 50, Proportion of Import Value of Fescue Seed by Country in 2008	53
Figure 51, Comparison of Import Volume and Value of Kentucky Bluegrass Seed, 2003-2008 ..	54
Figure 52, Proportion of Import Value of Kentucky Bluegrass Seed by Country, 2007-2008.....	55
Figure 53, Comparison of Import Volume and Value of Ryegrass Seed, 2003-2008	56
Figure 54, Proportion of Import Value of Ryegrass Seed by Country in 2008.....	56
Figure 55, Comparison of Import Volume and Value of Sugar Beet Seed, 2003-2008.....	58
Figure 56, Proportion of Import Value of Sugar Beet Seed by Country in 2008	59
Figure 57, Changes in Import Value of Various Seed in China, 2003-2010.....	61
Figure 58, Changes in Export Value of Various Seed in China, 2003-2010.....	63

ATTACHED TABLES

Table1, Import Volume of Main Importers of Corn Seed, 2003-2008	65
Table2, Export Volume of Main Exporters of Corn Seed, 2003-2008	65
Table3, Export of Rice Seed by Country in 2008	66
Table4, Export Volume of Main Exporters of Japonica Rice Seed, 2004-2008	66
Table5, Export Volume of Main Exporters of Indica Rice Seed, 2004-2008	67
Table6, Main Importers of Sunflower Seed, 2003-2008	67
Table7, Main Importers of Pea Seed, 2003-2008	67
Table8, Export of Potato Seed by Country, 2006-2007	68
Table9, Main Exporters of Potato Seed, 2003-2008	68
Table10, Export of Cotton Seed by Country, 2006-2008	69
Table11, Import Volume of Vegetable Seed from the Main Original Countries (Districts), 2001-2008 ...	69
Table12, Import Value of Vegetable Seed from the Main Original Countries (Districts), 2001-2008	70
Table13, Import Price of Vegetable Seed from the Main Original Countries (Districts) 2001-2008	70
Table14, Import Volume of Main Importers of Vegetable Seed, 2003-2008	71
Table15, Export Volume of Vegetable Seed to the Main Destination Countries (Districts) 2001-2008 ...	71
Table16, Export Value of Vegetable Seed to the Main Destination Countries (Districts), 2001-2008	72
Table17, Export Price of Vegetable Seed to the Main Destination Countries (Districts) 2001-2008	72
Table18, Export Volume of Main Exporters of Vegetable Seed, 2003-2008	73
Table19, Import and Export of Watermelon by Country in 2008	74
Table20, Import Volume of Main Importers of Watermelon Seed, 2003-2008	75
Table21, Export Volume of Main Exporters of Watermelon Seed, 2003-2008	75
Table22, Export of Melon Seed by Country, 2004, 2005, 2008	76
Table23, Export Volume of Main Exporters of Melon Seed, 2003-2008	76
Table24, Import Value of Seed of Dormant Bulbs and Tubers from the Main Destination Countries (Districts) , 2003-2008	77
Table25, Import Volume of Main Importers of Seed of Dormant Bulbs and Tubers , 2003-2008	77
Table26, Export of Herbaceous Flower Seed by Country in 2008	78
Table27, Export Volume of Main Exporters of Herbaceous Flower Seed, 2003-2008	78
Table28, Import Volume of Main Importers of Herbaceous Flower Seed, 2003-2008	79
Table29, Export of Lucerne Seed by Country, 20007-2008	80
Table30, Export Volume of Main Exporters of Lucerne Seed, 2003-2008	80
Table31, Import Volume of Main Importers of Clover Seed, 2003-2008	81
Table32, Import of Fescue Seed By Country, 2006-2008	81

Table33, Import Volume of Main Importers of Fescue Seed, 2003-2008	81
Table34, Import Volume of Main Importers of Kentucky Bluegrass Seed, 2003-2008	82
Table35, Import Volume of Main Importers of Ryegrass Seed, 2003-2008.....	82
Table36, Import Volume of Main Importers of Sugar Beet Seed, 2003-2008.....	83
Table37, Import Situation of Main Import of Various Seeds Types in China, Jan.-Apr., 2009.....	83
Table38, Import Value and Changes in Various Seed Types in China, 2003-2010	84
Table39, Export Situation of Main Export of Various Seed Types in China, Jan.-Apr., 2009	84
Table40, Export Value and Changes in Various Seed types in China, 2003-2010	85
Table41, MOA of China Authorised List of Import and Export Enterprises with Licences to Operate (104 Enterprises)	86
Table42, MOA of China Authorised List of Foreign Invested Enterprises (FIE) with Seed Business Licences (42 Enterprises)	90
Table43, MOA of China Authorised List of Nationwide Yu-fan Marketing Integration Enterprises with Seed Business Licences. (101 Enterprises)	92