

Report on China's Vegetable Seed Industry



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Presented by:

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June 2012

Research Background

Seed is the most fundamental and most important production material in agricultural production. With the growth of global population, the deteriorating of natural environment and the continual decrease of planting land, agricultural production has an increasing demand of seed with high yield and excellent anti-disease qualities. The competition advantage in the seed market will determine the priority in future agricultural competition.

As an agricultural giant, China normally needs over 12.5 billion tons of seeds for its agricultural production each year, and has become the second largest seed market next to America in the world. The vegetable production in China normally needs about over 400,000 tons of seeds; however, the commercialized seed accounts for only 60% of the total. There is still a long way to go for China to catch up with the international level, which also indicates that China's vegetable seed market still has enormous development potential.

This report provides a comprehensive and detailed description of the status quo of China's vegetable seed market, and conducts a professional estimation and analysis of the development orientation of China's vegetable seed market. The main contents of report on China's vegetable seed industry include:

1. an in-depth analysis of the vegetable types, cultivated varieties, and major planting types in key provinces in Segmented Market of China's vegetable planting areas, i.e. South China, Yangtze River Area, Southwest China, Northwest China, Northeast China, and Huang-Huai-Hai and Bohai Area;

2. an in-depth analysis of seed market and corresponding leading enterprises of the Segmented Markets of China's major types of vegetable seeds, i.e. tomato, cucumber, eggplant, pepper, Chinese cabbage, radish, cabbage, watermelon, melon and sweet-waxy maize;

3. an introduction of the development status quo of domestic and overseas vegetable seed enterprises and their leading products in the market;

4. an analysis of China's vegetable seed import & export;

5. the future development of China's vegetable seed industry.

Industry insiders will have an overall understanding of China's vegetable seed industry development by reading this report, and thus be able to conduct corresponding decision-makings in a more accurate manner.

This report is the crystallization of collective wisdom of relevant experts of vegetable seed market, who are organized by BOABC to conduct an accurate, objective, overall and

systematic in-depth analysis of the entire vegetable seed market and corresponding policies. BOABC believes that this report will be an important reference for relevant enterprises, research institutions and domestic & overseas investment enterprises, who have paid attention to China's vegetable seed industry, to learn about the movements of China's current vegetable seed industry as well as to grasp the development trend and investment opportunities in China's vegetable seed market.



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SAMPLE:

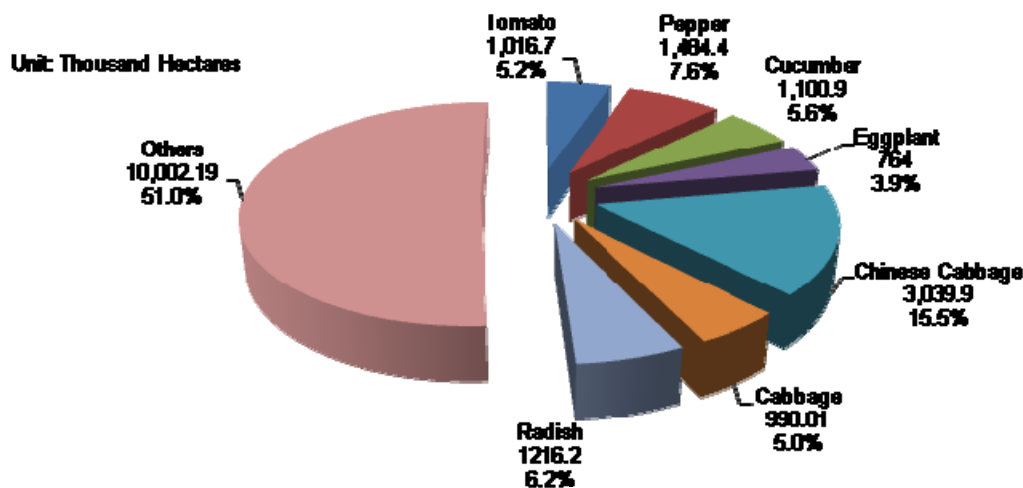
1.5.2 Subdivision Varieties of China's Vegetable Seed

There is a wide variety of vegetable in China. Currently, there are over 100 kinds of vegetable being planted in China. The major cultivation types are about 40-50, such as the Solanum vegetables, including tomato, pepper and egg plant; the cruciferous, including Chinese cabbage, cabbage and broccoli; the leaf vegetable, including spinach, celery, celtuce and lettuce; the beans, including cowpea, peas and kidney bean; root vegetables, including radish and carrot; bulb vegetable, including scallion, Chinese chives, onion and garlic; gourd and melon vegetable, including cucumber, pumpkin, white gourd and bitter melon, etc.

Due to the wide varieties of vegetable types and the diversity of seed demand between vegetable types, the analysis of China's vegetable seed market in this report will mainly focus on the vegetable type that are widely planted and comparatively highly commercialized. Besides, there is also analysis into the market of watermelon seed, melon seed and sweet and wax maize seed. Due to the diversity of seed demand between different types of vegetable, this report will analyze the market scale of each vegetable seed type through the planting area, investment and the commercialization of seed of each vegetable type.

In 2011, the planting area of tomato, pepper, cucumber, egg plant, Chinese cabbage, cabbage and radish accounted for 49.0% of the national total vegetable planting area.

Figure 1.1, Distribution of Vegetable Sub-types in China in 2011



Data source: BOABC, *China Agricultural Statistics Yearbook*

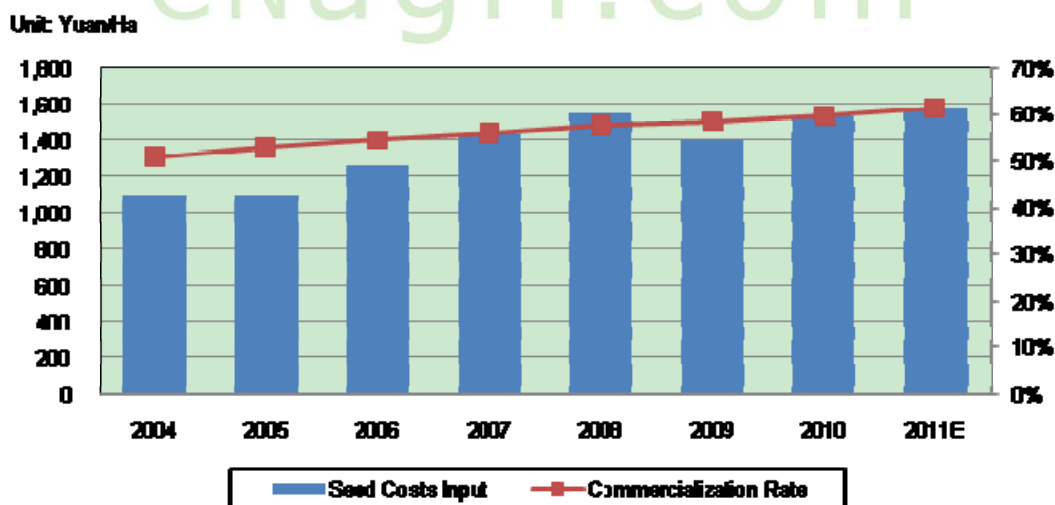
1.5.3 Analysis of China's Vegetable Seed Cost Input and Commercialization in 2004-2011

The global shortage of resources leads to the rise of raw material price, which in turn drives up the cost of vegetable seed breeding and production. Meanwhile, the improvement of the commercialization of seeds together with the invasion and monopoly of transnational seed corporation in China's vegetable seed market cause the seed cost investment to rise year by year in China.

With the wide spread of high-quality vegetable varieties in China and the upgrading of local native varieties and old varieties, the commercialization degree of vegetable seeds in China has been improved year by year. In 2004, the commercialization rate was 50.8%; in 2010, 59.4%, increasing by 8.6%. In 2011, the commercialization rate will be still higher, about 60%. Currently, China is making great effort to develop facility agriculture and promote the industrialization of vegetable, which may propose higher requirement concerning the quality of vegetable seeds. It is estimated that the commercialization rate of vegetable seeds in China will continue to be on stable rise in future years.

In 2010, the average input of seed cost in each hectare of vegetable planting in China was 1,529.4 Yuan, increasing by 9.5%, and it is 133,3 Yuan higher than the 1,396.1 Yuan in 2009.

Figure 1.2, Changes of China's Vegetable Seed Cost Input (2004-2011)

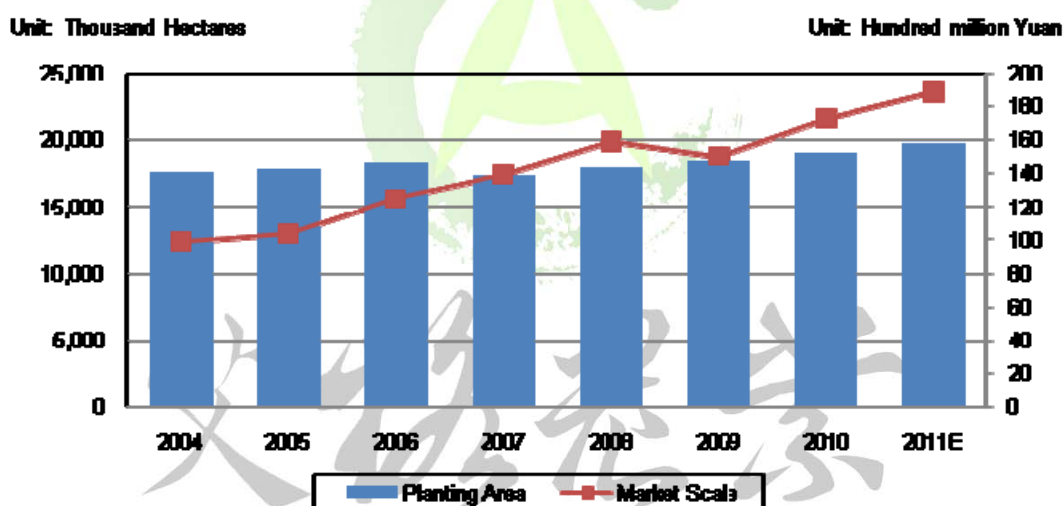


Data source: BOABC, *Cost-Profit Information of National Agricultural Products*

1.5.4 Analysis of China's Vegetable Seed Market Scale Changes in 2004-2011

Due to the enlargement of China's vegetable planting area and the improvement of seed commercialization rate, as well as the increase of vegetable seeds cost input. The scale of China's vegetable seed market has seen constant increase year by year. In 2004, China's vegetable seed market scale was about 9.83 billion Yuan; in 2010, it surged to 17.27 billion Yuan, increasing by 75.9%. It is estimated that the market scale will increase to 18.8 billion Yuan in 2011. Currently, the commercialization rate of China's vegetable seeds is about 60%, which is still much less than the commercialization rate of 80% in developed countries. It indicates that there is still a wide development space in China's vegetable seed market.

Figure 1.3, Changes of China's Vegetable Seed Market Scale (2004-2011)



Data source: BOABC, *China Agricultural Statistics Yearbook, Cost-Profit Information of National Agricultural Products*

1.5.5 Analysis of China's Vegetable Seed Demand

For China's vegetable planting, the planting profit of vegetable is higher than that of other field crops, though there is no state subsidy to vegetable planting. Chinese government pays great emphasis on the development of vegetable industry. The "vegetable basket" project is a guarantee project implemented to ensure the daily consumption of people and to earn foreign exchange through export. As vegetable is daily necessity, the growth of vegetable product will drive the vegetable seed industry to grow. The vegetable planting area in China keeps on increasing, and maintained a growth rate of about 3% each year in the period of 2008-2011. According to the perennial need of vegetable seed in China is 40,000 tons each year, China need an

increase of 1,200 tons of seeds each year to meet the demand of increasing vegetable planting area.

Table 1.1, China's Vegetable Planting Area and Changes of Growth Rate (2004-2011)

Unit: Thousand Hectares

Project	2004	2005	2006	2007	2008	2009	2010	2011
Vegetable	17,560.6	17,720.7	18,216.9	17,328.6	17,875.9	18,414.3	18,999.9	19,614.3
Planting area								
Growth rate		0.91%	2.80%	-4.88%	3.16%	3.01%	3.18%	3.23%

Data source: BOABC, *China Agricultural Statistics Yearbook*

