



FLYER

# Seed China News



## Exclusive stories monthly

## Who needs it?

- ☞ **Seed companies**  
Targeting China and global seed industry, the news helps you know the competitors' latest dynamics in China's seed market, and assists in seeking suitable partners
- ☞ **Research institutes**  
Research institutes who are desired of knowing the latest seed technologies and to transfer advanced seed technologies to China
- ☞ **Analysts and consultants**  
CCM will facilitate your researches by offering penetrating insight into the market trend for China seed industry and its related industries
- ☞ **Seed treatment companies**  
This news also helps you find out market potential and opportunities of seed treatment in Chinese market.
- ☞ **Venture capital investor**  
CCM aids your work by identifying commercial opportunities in China seed industry

## What will you get?

- ☞ PDF newsletter covering over 10 stories delivered monthly
- ☞ Guaranteed in-depth news
- ☞ Access to online archive of all previous issues with downloadable files
- ☞ Professional solution to query related to China seed industry



## Chinese seed industry entering new development stage

There is a saying in China, "Agriculture feeds the nation, and seed feeds agriculture". As a country with large seed production and consumption, China shows great vitality and potential in seed market. China's total seed market value reached USD8.32 billion in 2009 compared with USD2.42 billion in 2001, with CAGR of 16.69% from 2001 to 2009.

Owing to huge market opportunity, high gross profit rate and considerable investment returns, more and more overseas seed companies expand into China. Up to now, over 70 overseas seed producers, such as Monsanto, Dupont/Pioneer, and Syngenta, etc., have set foot in China seed market. Overseas seed players have dominated some highly added-value seeds, such as vegetable seeds, flower seeds.

As more and more overseas seed companies enter Chinese seed market, domestic seed enterprises own slim advantage in the intensely competitive market due to scattered production and low R&D capability.

On one hand, seed production is quite scattered in China with too many seed companies. On the other hand, the inefficient technology innovation capability results in declining competitiveness of Chinese seed companies. Most of the new seed varieties of domestic seed companies are mainly purchased from domestic scientific research institutions, instead of being developed through their own research.

However, since it is an important measure to increase agricultural output, Chinese government pays close attention to seed industry. The government plans to enhance merger and acquisition in seed industry in the forthcoming years in a bid to foster world-class

seed companies.

Besides, although there is much controversy over the GM crops commercialization, Chinese government attaches importance to GM technology and has invested a lot of funds in the development of GM technology.

Entering 2010, China's seed industry has maintained fast development with high growth of over 10%, and the central government attached great importance to the seed industry development in the "No. 1 Document" for the first time at the beginning of 2010, to promote the merger and acquisition of seed companies and cultivate leading competitive seed companies on the international stage.

This policy guidance indicated that Chinese seed industry has entered a new development stage since 2010, along with the **more and more big events** occurred in this industry since the issue of the "No. 1 Document", such as the intensification in merger and acquisition, the enhanced cooperation between domestic and overseas companies, more seed companies getting listed, etc.

Besides, with the more and more new varieties bred and promoted, the seed commercialization rate of most crops has maintained sustainable growth in China and meanwhile the varieties' upgrading has been boosted in recent years, which also needs the real-time monitoring in the seed market.

In a word, changes in China's seed industry have not only been notable, but also frequent, puzzled both outsiders and industry insiders, not knowing where to go next. Many a factor influences the industry and leads to the substantial changes, and thus it is highly necessary to offer timely update and close follow-up of the dynamics in this industry.

Time	Great events in seed industry in 2010
Jan.	Central government announced in the "No. 1 Document" for the first time to promote the merger and acquisition of seed companies and cultivate leading competitive seed companies.
April	Beijing Dabeinong, one of the leading rice seed companies in China, got listed on A-share market.
May	Winall Hi-tech Seed, mainly engaged in two line hybrid seed, was listed on A-share market.
May	Longping High-tech contracted with Shanxi Limagrain to appoint the former as the sole agent in China for marketing corn variety Lihe16 developed by the later.
Sept.	Bayer CropScience and Chinese Oil Crops Research Institute (OCRI), Chinese Academy of Agricultural Science (CAAS) reached an agreement on rapeseed research.
Sept.	Ministry of Agriculture released the draft of "Seed production and distribution license management" to crack down the current chaotic seed industry.
Nov.	Xinjiang Condy came to an agreement with KWS to fund a joint venture named Condy KWS Seed, and Xinjiang Condy's IPO application has been approved by China Securities Regulatory Commission.

## Main Content

### Required Columns

#### Company dynamics

Report the latest news about companies in China, such as development and promotion of new varieties, company expansion, merger & acquisition, cooperation, etc.

Find out stories behind the news, including company development strategy, related policy, global market situation, etc. Figure out how the companies explore the domestic seed market.

#### New technology and varieties

Cover the latest information on new technology and varieties in domestic seed market. Present in-depth analysis of the merits and demerits of new varieties, evaluating their competitiveness in the industry.

#### Seed treatment dynamics

Report seed treatment dynamics in China such as seed treatment technologies, new seed treatment products, seed treatment market in major crops, dynamics of seed treatment companies, etc.

#### Market analysis

Find out the consumption structure and end-user behaviors of commercialized seeds through in-depth site visits, especially in vegetable and corn. Also offer the seed supply and demand info of major crops such as corn, cotton, rice, vegetables, etc.

#### MNCs' activities

Focus on dynamics of oversea companies, covering technological and R&D activities, development and promotion of new varieties, company strategies such as expansion and cooperation, etc.

#### Policy & Legislation

Provide the latest policies and legislations in China and abroad related to seed industry, such as enhancement in merger and acquisition in seed industry, subsidies to improved seed varieties, reinforcement in development of GM technology, etc.

### Optional Columns

#### Import/ Export analysis

Monitor the volume and value of seed import and export, and analyze the factors behind.

#### Planting structure

Report the crop planting structure and its influence on seed demand, covering changes of planting areas, planting habits, improvement of planting technology, etc.

#### Sales mode

Focus on sales mode in domestic seed market; identify the difference between domestic companies' sales mode

and that of the oversea companies; keep track of the latest sales mode trend.

#### Seed price

Update price of rice seed, corn seed, vegetable seed etc. As for significant price difference between different varieties, CCM will make in-depth analysis of the key factors and company strategies leading to it.



## Approaches

CCM will employ the following methods to obtain the information required:

### Telephone interview

Phone interview with seed companies, research institutes, governments, pesticide associations, distributors, peasants, etc. will be conducted to gain first-hand information on China's seed industry.

### Face-to-face interview

CCM carries out face-to-face interviews with seed producers, experts, experienced salespersons, exporters and peasants, to obtain in-depth analysis & comment on related issues.

### Expert consultancy

CCM has established long-term relationship with many experts from domestic seed industry and can obtain information from them or through information exchange. They also contribute stories or comments to CCM regularly.

### In-depth investigation

CCM conducts in-depth investigations on those seed companies with great influence on China's seed market or the global market.

### Exhibition participation

CCM attends influential exhibitions at home and abroad to obtain the latest information on new technologies, seed producers, etc. CCM establishes database for these exhibitors and keeps in touch with them regularly.

### Professional data processing and forecasting

CCM are professional in processing information concerning seed, pesticide, econometrics, international trade, polymer chemistry, renewable energies and biochemistry ecology etc. Professional software for data processing and forecasting, including SPSS/SAS, Eviews, are applied to facilitate our work. Specialized and professional competence will ensure our work well done.

### Other methods helpful to our work

Any method feasible and helpful to our work will be adopted. For instance, internet searching is an important way for information obtaining. Besides, we may register on authoritative websites and obtain information from them.

CCM International Limited is an independent consulting company focused on China's chemicals and agriculture including seed sector. CCM's expertise lies in market researches, news, conferences and databases, in such industries as seed, insecticide, crop protection, herbicide, fungicide, insecticide, pigment, coating, food ingredient, renewable energy, fine chemicals, bio-technology, etc. CCM has established good reputation as one of the key information providers in these industry sectors.





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