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**Report Highlights:**

China's seed supply for marketing year 2025/26 is sufficient to meet domestic demand, with seed producers generally achieving high yields for major crops including corn, rice, wheat, and soybeans. Imports of vegetable and grass seeds are declining due to rising domestic production, though China still relies on high-end foreign germplasm for specialty seeds. Seed exports are growing, particularly for rice, cotton, and vegetables, driven by strong demand in Asia for Chinese-developed seeds as a finished product for crop production as well as from foreign seed companies which utilize operations in China for certain intermediate portions of their global supply chains.

FAS China provides this reporting and analysis as a service to U.S. farmers, ranchers, rural communities, and agribusinesses in support of a worldwide agricultural information system and a level playing field for U.S. agriculture.

## **I. Production**

China is the world’s second-largest seed market, following the United States. The demand for quality seeds is rising, driven by modernization of agriculture, food security concerns, and the push for sustainable farming practices. Improving seed performance has been identified as a key strategic focus for China to meet its food security goals. While Beijing has sought to increase focus on the sector, it continues to place restrictions on foreign investment. Despite a recent trend towards consolidation, the industry remains highly fragmented.

Like in many economic sectors in China, transparent and reliable information for the seed sector is not consistently available. According to [China Major Crop Seed Supply and Demand in 2025-2026](#) released by the National Agricultural Technology Extension and Service Center of the Ministry of Agriculture and Rural Affairs (MARA) in September 2025, China’s seed supply for marketing year (MY) 2025/26 exceeds overall demand. However, unlike in previous years, MARA did not disclose total production figures for individual crop seeds. Instead, the forecast provided information on seed planted areas and approximate yields, such as historical high yields or yields exceeding those of the previous year.

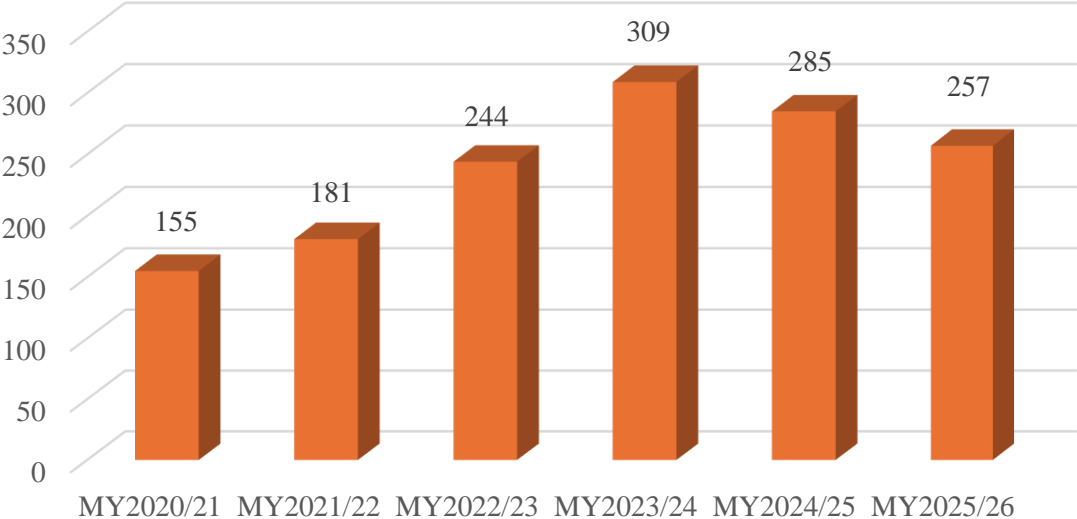
MARA has been tasked with improving the capabilities of the Chinese seed sector. This year, MARA has emphasized the success of the Chinese sector in reliably providing sufficient quantities of seed and improving their risk management. MARA also states that companies are seeing improved market returns for newly introduced varieties. On the other hand, MARA is encouraging companies to make “horizontal comparisons” and “make rational decisions”, which could be interpreted as avoiding competing in already crowded markets—a problem in many other parts of the Chinese economy. MARA also directs companies to develop varieties which are capable of dealing with a wide range of weather conditions.

### **Corn Seed**

According to MARA’s statistics, MY 2025/26 corn seed planted area was 257,000 hectares (ha), representing a 10 percent decrease from the previous year. Despite this decline, the area remains relatively high compared to the 5-year average (see Figure 1). Favorable weather in key corn seed production regions, along with the adoption of advanced seed production technologies, is expected to result in record-high yields. For context, last year’s average yield was 5,950 kg/ha—the highest in the past five years—and this year’s yield is projected to surpass that benchmark. Post estimates total MY 2025/26 corn seed production to exceed 1.5 million metric tons (MMT). Corn seed stocks are estimated at 750,000 MT, while anticipated commercial seed demand is 1.3 MMT, indicating sufficient supply to meet market needs.

Varieties expected to perform particularly well in the market include genetically engineered (GE) hybrids for the North China Plain summer corn region, and ear-rot-resistant varieties for the Northeast and North China spring corn regions.

**Figure 1. China’s Corn Seed Acreage in MY2020/21-MY2025/26 (1,000 ha**



Source: National Agricultural Technology Extension and Service Center, MARA

**Hybrid Rice Seeds**

In MY2025/26, Post estimates the hybrid rice seed planted area at 150,000 ha, representing a 17 percent increase over the previous year. Favorable weather conditions appear to have pushed average yields above last year’s 2,410 kg/ha. Post estimates total hybrid rice seed production to exceed 365,000 MT. Current hybrid rice seed stocks are estimated at 91,000 MT, while forecasted commercial seed demand for MY2025/26 is 330,000 MT, including roughly 30,000 MT for exports. There is sufficient supply to meet demand. Notably, the market continues to see rising demand for heat-tolerant, high-quality, and high-yield hybrid rice varieties.

**Conventional Rice Seeds**

The conventional rice seed planted area is estimated at 178,500 ha in MY2025/26, nearly unchanged from the previous year. Key production regions, including Heilongjiang and Jiangsu, experienced favorable climatic conditions, leading to yields higher than last year’s average of 7,846 kg/ha. Post estimates total conventional rice seed production to exceed 1.4 MMT. Market demand for commercial seeds in MY2025/26 is estimated at 760,000 MT, and current supply levels are sufficient to meet this demand.

**Wheat Seeds**

Post estimates that wheat seed planted area reached 940,000 ha in MY2025/26, with an average yield of around 7,200 kg/ha, resulting in total production of 6.8 MMT. Together with 130,000 MT of carry-over stocks from the previous year, total supply amounts to approximately 6.9

MMT. Market demand for commercial seed is estimated at 3.9 MMT, indicating that supply is more than sufficient. In terms of variety trends, high-yield, high-quality wheat varieties that are lodging-resistant, cold-tolerant, and pre-harvest sprouting resistant are particularly favored.

## **Soybean Seeds**

For MY2025/26, Post estimates the soybean seed planted area at 386,000 ha in an 11 percent decrease from the previous year. While the Northeast experienced normal climatic conditions, the North China Plain region faced early drought, which was mitigated by timely rainfall later in the season. As a result, average yields are expected to exceed last year's 2,758 kg/ha. Post estimates total production to exceed 1.1 MMT. The commercial seed demand for MY2025/26 is projected at 600,000 MT, up from 580,000 MT in MY2024/25, reflecting an anticipated increase in soybean acreage. Current supply levels are adequate to meet production needs.

## **II. Trade**

### **Imports**

For MY 2025/26, Post forecasts seed imports at 70,000 MT, a 10 percent decline from MY 2024/25 due to lower grass and vegetable seed imports, which together account for over 90 percent of total seed imports by volume. Grass seeds accounted for 81 percent of import volume, with vegetable seeds adding another 9 percent. China imports few seeds for major grain crops, such as corn, wheat, rice, and soybean, due to market access limitations for these crops and owing, in part, to the China's policies intended to create self-sufficiency in grains.

Vegetable seeds represent the largest import by value, accounting for 58 percent of total import value in MY 2024/25, while grass seeds accounted for 20 percent. The United States remains China's largest seed supplier, accounting for 17 percent of planting seed imports by value, followed by Chile (15 percent), Denmark (9 percent), and Thailand (8 percent).

### ***Vegetable Seed Imports***

For MY 2025/26, Post forecasts vegetable seed imports at 7,200 MT, a decrease of about 10 percent from MY 2024/25. As high-value economic crops, vegetables offer significantly greater returns than field crops, motivating farmers to invest in high-quality, specialty seeds that promise greater profitability. Recognizing this market potential, leading Chinese seed companies have increased their investments in research and development in recent years. Advanced breeding technologies, such as gene editing, have been widely adopted to improve vegetable seed varieties. These efforts have led to notable progress in domestic vegetable seed breeding, driving a gradual shift toward domestic substitution and a long-term downward trend in import demand.

Despite these advancements, China continues to face challenges in accessing high-end parental lines and core genetic materials as multinational companies still control key germplasm with strong intellectual property protection. In addition, domestic breeding programs remain fragmented with limited long-term R&D investment, and farmers show strong brand preference for established foreign varieties. As a result, the country remains reliant on imports of premium

and specialty vegetable seeds to meet the demands of the high-end market, particularly for export-oriented production.

In terms of import value, Chile is China's largest supplier of vegetable seeds, accounting for 24 percent of China's vegetable seed import value in MY2024/25, even though its import volume only represents about 3 percent of the total. U.S. vegetable seeds also account for a relatively small (only 1 percent) of total imports but represent 9 percent of the total import value. In terms of volume, Thailand, Denmark and Indonesia are the largest vegetable seeds suppliers to China, together accounting for 75 percent of China's total vegetable seeds imports in MY2024/25

### ***Grass Seed Imports***

Grass seed (e.g., ryegrass, fescue, Kentucky blue grass, oat, forage, clover, and alfalfa) imports for MY 2025/26 are forecast to decline by 10 percent to 56,000 MT from MY 2024/25 due to weaker demand in China. Imported grass seeds fall into two main categories: forage seeds and turf seeds. Driven by the growing forage feed needs of the livestock sector, China's demand for forage seeds has continued to rise steadily; however, the gradual expansion of domestic forage seed production is reducing reliance on imports. Meanwhile, the economic downturn and a sluggish real estate market have led to shrinking demand for turf seeds used in landscaping and urban greening in recent years.

Beijing has continued to advance its "Grain-to-Feed" policy, encouraging the cultivation of high-quality forage crops such as silage corn and alfalfa to lower feed costs and improve feed structure for the livestock industry. According to [MARA data](#) (link in Chinese), China's forage planted area reached 7.3 million hectares in 2023, with a target of nine million hectares by 2030.

In November 2024, the National Development and Reform Commission (NDRC), MARA, and the National Forestry and Grassland Administration jointly issued the "[Opinion on Promoting the High-Quality Development of the Forage Industry](#)" (link in Chinese). The document emphasizes enhancing the level of the forage seed industry by supporting projects in forage germplasm resource conservation, quality seed breeding, and variety testing, while strengthening the sector's foundational capacity. The goal is to accelerate the development and promotion of new forage varieties that are high-yielding, high-protein, and resistant to stress and saline-alkali conditions. The policy also calls for improving the forage seed management system and speeding up the approval and dissemination of high-quality forage varieties. By 2030, China aims to increase its forage seed self-sufficiency rate to 75 percent.<sup>1</sup>

However, China's limitations in arable land, water, and other resources will also pose challenges for forage seed production. For the foreseeable future, China will still need to import forage seeds to meet domestic demand. As domestic forage seed production increases, imports are expected to trend downward.

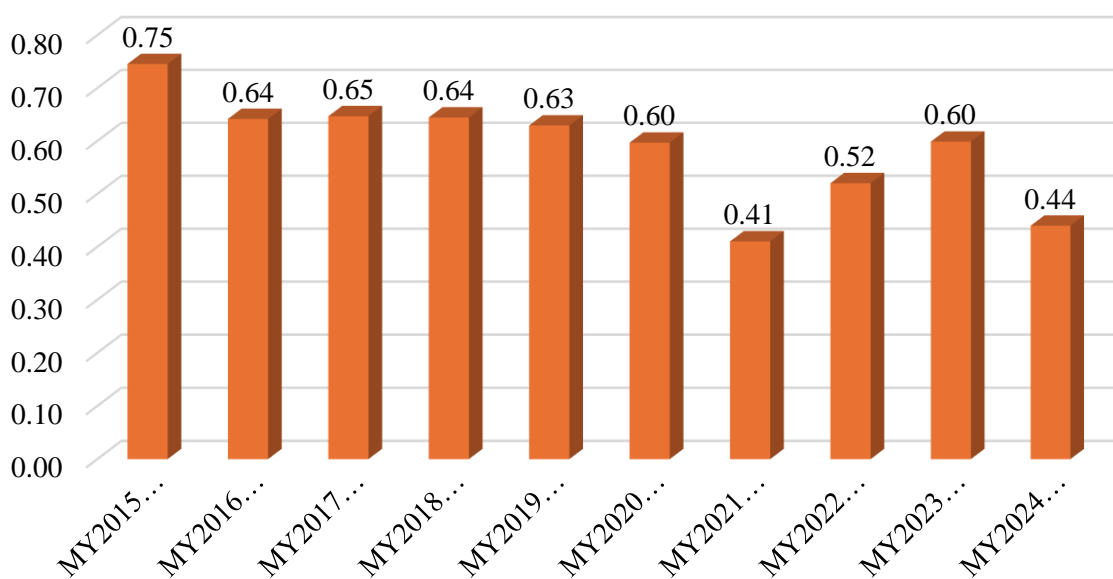
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<sup>1</sup> There is no official data available on the current self-sufficiency rate of forage seeds. Based on industry data and trade statistics, it is estimated that the current self-sufficiency rate is roughly between 50- 60 percent.

Ryegrass seed continues to be China’s top imported grass seed, accounting for 55 percent of total grass seed imports by volume in MY 2024/25. Annual ryegrass is mostly used as forage for feeding cows, sheep, poultry and fish, while perennial ryegrass is mostly used as ecological and lawn grass. Industry estimates that two thirds of imported ryegrass seeds were perennial and one-third were annual. Oat and alfalfa seeds are used as forage production, together accounting for 20 percent of total grass seed imports in MY2024/25. Kentucky blue grass, fescue, and clover grass, most used ecological and lawn grass, together accounted for 25 percent of total grass seed imports in MY 2024/25.

Despite ongoing concerns over tariffs (see policy section below on more information on tariffs), the United States remains China’s largest supplier of grass seeds in MY24/25, accounting for 44 percent of total imports, although its market share has dropped to nearly the lowest level in a decade (see Figure 2 below). Canada, Demark, and New Zealand are also major suppliers, with market shares 17, 16, and 13 percent, respectively.

**Figure 2. US Market Share of China's Imported Grass Seeds**



Source: Trade Data Monitor, LLC.

**Table 1. China: Major Planting Seed Imports from the World**

HS Code	Description	Volume (MT)			Value (\$1,000)		
		10/22 - 09/23	10/23- 09/24	10/24- 09/25	10/22 - 09/23	10/23- 09/24	10/24- 09/25
	Total planting seeds	67,233	83,792	75,856	478,009	527,815	499,401
120925	Rye grass	29,676	36,203	33,568	47,887	56,132	49,128
120923	Fescue seeds	3,327	14,121	10,551	9,020	31,688	15,203
100410	Oats seed	8,679	6,660	9,357	7,402	5,131	6,710
120991	Vegetable seeds	8,760	5,424	8,050	268,671	239,824	291,825

120999	Fruit and spores seeds	4,380	5,176	5,040	28,636	30,353	23,258
120924	Kentucky blue grass seeds	4,379	8,390	4,039	14,095	25,631	10,747
120929	Forage plants seeds	1,968	3,323	1,732	2,965	6,683	7,077
120921	Alfalfa seeds	4,222	2,800	1,341	17,768	11,456	5,797
120910	Sugar beet seeds	693	728	972	25,173	28,473	37,486
120922	Clover seeds	735	544	924	3,568	2,705	3,773
100510	Corn (maize) seed	303	282	189	5,024	38,999	2,226
120930	Herbaceous plants seeds	60	45	43	31,171	30,160	29,080
120770	Melon seeds	29	28	26	10,819	9,841	9,919
12060010	Sunflower seeds	23	46	24	5,809	10,719	7,172

Source: Trade Data Monitor, LLC.

**Table 2. China: Major Planting Seed Imports from the United States**

HS Code	Description	Volume (MT)			Value (\$1,000s)		
		10/22 - 09/23	10/23- 09/24	10/24- 09/25	10/22 - 09/23	10/23- 09/24	10/24- 09/25
	Total planting seeds	29,892	46,008	30,161	104,170	124,821	86,886
120991	Vegetable seeds	128	223	82	31,351	14,014	26,426
120925	Rye grass seeds	19,573	19,884	13,787	27,593	29,526	17,438
120999	Fruit and spores seeds	2,087	2,413	1,840	18,842	17,056	13,455
120923	Fescue seeds	2,424	11,612	7,606	6,650	26,149	10,736
120924	Kentucky blue grass seeds	4,339	7,777	3,671	13,976	23,881	9,839
12060010	Sunflower seeds for cultivation	5	25	13	1,531	7,389	3,686
120929	Forage seeds	719	2,541	620	1,170	4,004	2,669
100410	Oat seed	482	1,259	2,426	408	947	1,693
120930	Herbaceous seeds	7	5	5	2,499	1,724	890
120922	Clover seeds	0	46	29	0	76	54
120921	Alfalfa seeds	128	223	82	150	55	0

Source: Trade Data Monitor, LLC.

## Exports

Post forecasts total seed exports for MY 2025/26 at 72,000 MT, about 20 percent higher than MY 2024/25, driven by strong exports of rice and cotton seeds. In MY 2024/25, China's seed exports increased by 46 percent from MY 2023/24 to reach 60,484 MT, due to record-high cotton seed exports (see Table 3 below), mainly to Uzbekistan. According to [GAIN Report Uzbekistan Cotton Annual 2025](#), during the 2024/2025 growing season, Uzbekistan introduced 100,000 hectares of high-yield, disease- and pest-resistant foreign cotton varieties, sourced mainly from China. By MY 2025/26, Uzbekistan aims to expand this to 200,000 hectares, which will generate significant export opportunities for Chinese cotton seeds.

### *Rice Seed Exports*

For MY 2025/26, Post forecasts rice seed exports at 38,000 MT, about 10 percent higher than MY 2024/25 exports due to strong demand from Asian countries such as the Philippines and

Pakistan. These two countries are China’s top buyers of rice seeds, together accounting for about 85 percent of China’s total exports in MY 2024/25.

The Philippine government continues to provide subsidies for high-quality hybrid rice seeds to boost rice production and strengthen food security, which has generated strong demand for China’s hybrid rice seeds. Please refer to [Philippine government funds hybrid rice seeds](#) and [Grain and Feed Annual Philippine 2025](#) for additional details.

Rice has also remained a consistently profitable crop in Pakistan, resulting in a decade-long expansion of rice acreage. Higher-yielding hybrid varieties have largely replaced older non-hybrid types, driving significant demand for China’s hybrid rice seeds. For more information on rice production in Pakistan, please refer to [Grain and Feed Annual Pakistan 2025](#).

### ***Vegetable Seed Exports***

Post forecasts vegetable seed exports in MY 2025/26 at 4,100 MT, a 5 percent increase from the previous year, driven by strong demand from outsourced seed production. Industry sources indicate that a significant portion of China’s vegetable seed exports comes from outsourced production, where foreign importers contract Chinese seed producers to grow seeds according to specific requirements and then export them. Many foreign vegetable seed companies leverage China’s relatively low labor costs, skilled seed production workers, and favorable climates in major production areas such as Gansu and Xinjiang, to produce seeds on small plots. These seeds are generally exported from China and further processed in another country before being sold to their target markets worldwide.

**Table 3. China: Major Planting Seed Exports to the World**

HS Code	Description	Value (\$1,000s)			Volume (MT)		
		10/22 - 09/23	10/23 - 09/24	10/24 - 09/25	10/22 - 09/23	10/23 - 09/24	10/24 - 09/25
	Total planting seeds	306,681	323,608	386,307	30,551	41,371	60,484
10061021	Long rice seeds	86,517	121,284	135,323	21,757	30,778	34,817
120721	Cotton seeds	381	5,064	41,899	151	2,017	16,155
120991	Vegetable seeds	151,543	138,215	149,680	3,897	3,509	3,929
10061029	Other rice seeds	5,479	8,479	5,501	1,622	2,383	1,531
100510	Maize seeds	3,721	5,139	7,474	986	1,246	2,560
120930	Herbaceous seeds	24,169	19,263	18,102	813	551	786
120999	Fruit seeds	5,447	2,473	1,268	744	336	205
120929	Forage seeds	1,113	744	498	261	196	178
12077010	Melon seeds	27,880	22,343	26,161	209	195	210
120110	Soybean seed	415	480	197	106	131	49
120921	Alfalfa seeds	16	91	188	5	26	64
120925	Rye seeds	0	33	16	0	3	0

Source: Trade Data Monitor LLC.

The Netherlands, China's largest export market, accounted for 19 percent of total vegetable seed export value in MY 2024/25, followed by the United States, South Korea, Italy and Japan, with market share of 11, 10, 8 and 7 percent, respectively. China's top vegetable seed exports include tomatoes, sweet peppers, lettuce, and eggplant.

### **III. Policy**

The following are seed-related policy updates and key policies affecting planting seeds in China since the publication of the [China 2024 Planting Seed Annual Report](#).

#### **General Directive for Labeling of Agricultural Seeds Published**

On October 28, 2024, the State Administration for Market Regulation (SAMR) published the revised mandatory national standard [General Directive for Labeling of Agricultural Seeds](#) (link in Chinese), which came into effect on October 1, 2025. Notable changes in the revised directive include:

1. Additional required content for seed labels: Added content includes the testing date, quality assurance period, suitable planting area for the variety, planting season, information codes, variety registration number, and plant variety right number.
2. Added definitions of the description of cultivation and uses: Both the seed label and description of cultivation and uses are required to be attached to seed packages.
3. Special labeling for GE Seeds: For GE seeds, the new draft requires that the seed label include event information from the biosafety certificate and information on the performance of the target trait. Backcross-breeding varieties must be labeled with recipient variety information.
4. Additional labeling for Imported Seeds: For imported seeds, the new directive requires that in addition to the original label, a Chinese label and a description of cultivation and uses should be attached.

Please refer to [GAIN Report Revised General Directive for Agricultural Seeds Labeling Published](#) for detailed requirements information on the new seed labeling directive.

#### **Regulations on the Protection of New Plant Varieties Published**

On May 1, 2025, the State Council released the amended [Regulations of the People's Republic of China on the Protection of New Plant Varieties](#) (link in Chinese), which came into effect on June 1, 2025. The revised version strengthens the protection of variety rights in all aspects, from the scope of protection to the duration of protection. The latest revision expands the scope of plant variety rights protection to include harvested material and covers additional stages such as processing for reproduction, offering for sale, import, export, and storage. Protection now also extends to essentially derived varieties (EDVs), varieties not clearly distinguishable from authorized varieties, and varieties produced commercially using authorized varieties. The protection periods have been extended to 25 years for woody and vine plants and 20 years for other plants. Novelty requirements have been strengthened, including the consideration of varieties that have spread widely or have been registered for over two years without applying for new rights. The preliminary examination period for variety rights has been shortened from six to three months, with a possible three-month extension for complex cases. Please refer to [GAIN](#)

[Report Regulations on the Protection of New Plant Varieties Finalized](#) for an unofficial translation of the regulation.

### **Guidelines for the Examination of Objections to New Plant Variety Rights in Agriculture Released**

On November 10, 2025, MARA released [Guidelines for the Examination of Objections to New Plant Variety Rights in Agriculture \(Trial Implementation\)](#) (link in Chinese), which established procedures for handling objections raised before a plant variety right is granted in China. MARA's Plant Variety Protection Office oversees the process, while examiners are responsible for accepting and reviewing objections. Objections may be filed on grounds such as lack of novelty, distinctness, uniformity, or stability, improper naming, or disputes over ownership or application materials. The guidelines outline strict requirements for documentation, evidence, deadlines, and communication between the objector and applicant, including possible testing or verification when needed. Final examination opinions are to be issued within 12 months of acceptance, ensuring fairness, efficiency, and transparency in plant variety right authorization.

### **Biotechnology and Planting Seeds**

China's seed industry has increasingly embraced biotechnology, including GE crops and advanced breeding technologies such as gene editing, to boost productivity and crop resilience. Current research emphasizes the development of GE and gene-edited crops with enhanced pest resistance, herbicide tolerance, and increased yields. MARA has already issued biosafety certificates for GE cotton, papaya, rice, corn, and soybeans, as well as gene-edited soybeans, wheat, corn, and rice for local cultivation.

China continues to prohibit foreign direct investment in the breeding of GE varieties of crops, breeding livestock and poultry, aquatic seedling species, as well as the production of their GE seeds (seedlings), under the "Special Administrative Measures for Foreign Investment Access (Negative List) 2024," published in September 2024.

Please refer to [2025 China Biotechnology Annual Report](#) for detailed information on China's biotechnology sector developments.

### **Tariffs on U.S. Origin Seeds**

From April 4 to May 13, 2025, U.S. seeds were subject to a 34 percent reciprocal tariff, the same as all U.S. exports to China. Since May 14, 2025, the reciprocal tariff was reduced to 10 percent and has been extended to November 10, 2026. Certain U.S. agricultural products, including some planting seeds, are also subject to Section 301 retaliatory tariffs, which can be excluded upon request by importers through the end of 2026. Please refer to [GAIN Report China Reduces Tariff Rates on US Agricultural Products](#) and [GAIN Report China Extends Section 301 Tariff Exclusions for US Agricultural Products](#) for detailed information on tariffs and 301 exclusions.

**Table 5. China: Schedule of Tariffs on U.S. Planting Seeds**

HS Code (8-digit)	Product Description	MFN Rate	Section 301 Retaliation	SCTC Ann. No. 7, May 13, 2025	Total Projected Tariff	Total Applied Tariff with 301 Exclusion
10011100	Durum Wheat Seed, in-quota	1%		10%	11.0%	11.0%
10021000	Rye Seed	0%	5.0%	10%	15.0%	10.0%
10031000	Barley Seed	0%	5.0%	10%	15.0%	10.0%
10041000	Oats Seed	0%	5.0%	10%	15.0%	10.0%
10061021	Long Grain Rice Seed, In-Quota	1%	25.0%	10%	36.0%	11.0%
10061021	Long Grain Rice Seed, Out-of-Quota	65%	25.0%	10%	100.0%	75.0%
10061029	Other Rice Seed, In-Quota	1%	25.0%	10%	36.0%	11.0%
10061029	Other Rice Seed, Out-of-Quota	65%	25.0%	10%	100.0%	75.0%
10071000	Grain Sorghum Seed	0%	5.0%	10%	15.0%	10.0%
10083000	Canary Seeds	2%	5.0%	10%	17.0%	12.0%
10084010	Fonio Seed	0%	5.0%	10%	15.0%	10.0%
10085010	Quinoa Seed	0%	5.0%	10%	15.0%	10.0%
10086010	Triticale Seed	0%	5.0%	10%	15.0%	10.0%
12011000	Soybean Seed	0%	5.0%	10%	15.0%	10.0%
12023000	Ground nuts, for cultivation	0%	5.0%	10%	15.0%	10.0%
12051010	Rape or canola seeds, erucic acid, for cultivation	0%	5.0%	10%	15.0%	10.0%
12059010	Rape or canola seeds, other, for cultivation	0%	5.0%	10%	15.0%	10.0%
12072100	Cotton seeds, for cultivation	0%	5.0%	10%	15.0%	10.0%
12073010	Castor oil seeds; for cultivation	0%	5.0%	10%	15.0%	10.0%
12074010	Sesame seeds, for cultivation	0%	5.0%	10%	15.0%	10.0%
12075010	Mustard seeds, for cultivation	0%	5.0%	10%	15.0%	10.0%
12076010	Safflower seeds, for cultivation	0%	5.0%	10%	15.0%	10.0%
12079910	Other oilseeds and kenerl, for cultivation	0%	5.0%	10%	15.0%	10.0%
12091000	Sugar beet seed	0%	5.0%	10%	15.0%	10.0%
12092990	Other forage seeds, for cultivation	0%	5.0%	10%	15.0%	10.0%

Source: China Customs

#### IV. Marketing

China is the world’s second-largest seed market, following the United States. The demand for quality seeds is rising, driven by modernization of agriculture, food security concerns, and the push for sustainable farming practices. According to [MARA statistics](#), China’s crop seed market reached 156 billion yuan (approximately \$22 billion) in 2023. Corn seeds accounted for 30 percent of the market, while rice and wheat each held a 15 percent share.

Foreign seed companies have a relatively limited overall presence in China due to strict regulatory requirements, market access barriers, and strong competition from domestic firms. However, they remain influential in certain high-value segments such as vegetable seeds, turf and forage seeds, and some hybrid corn varieties. Their strengths typically lie in advanced breeding technologies, high-quality germplasm, and well-established global research and development systems. Despite these advantages, their market expansion in China continues to be constrained by variety registration rules and restrictions on foreign investment in seeds and biotechnology sectors.

The traditional marketing channel for planting seeds in China is largely built around multi-tiered dealer networks. Seed companies typically sell to provincial or regional distributors, who then supply county-level wholesalers and local retail stores. These retailers—often agricultural input shops—serve as the main point of contact for farmers, providing seeds along with fertilizers and agrochemicals. Marketing relies heavily on field demonstrations, word-of-mouth recommendations, and relationships between local dealers and farmers. Although e-commerce and direct-to-farmer models are emerging, the conventional dealer-based system still dominates most regions, especially in rural areas.

**Table 4. China: Certification Requirements for U.S. Seed Product Exports**

<b>Certification</b>	<b>Attestation Required</b>
Quarantine Inspection Permit (QIP)	Information regarding the content, volume, and physical characteristics of the shipment
Certificate of Origin	Certifies origin of wood and wood product imports
APHIS Phytosanitary Certificate	Certifies product is free of quarantine pests
Agricultural biotech products: MARA import permit	Permits the importation of crops of agricultural biotechnology; each permit is valid for each shipment and for a period of six months.

#### **Seed Trade Certification Requirements**

Seed products trade should be accompanied by required certificates/permits issued by the relevant competent authority. Table 4 above provides certification requirements for U.S. seed exports to China. For additional information, please see GAIN report [FAIRS Export Certificate Report Annual 2025](#).

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<a href="http://www.betterseed.org">American Seed Trade Association</a> Email: <a href="mailto:info@betterseed.org">info@betterseed.org</a>	<a href="http://www.crop-life.com">CropLife Asia</a>
<a href="http://www.agri.gov.cn">China Seed Association</a> Email: <a href="mailto:z zxh@agri.gov.cn">z zxh@agri.gov.cn</a>	<a href="http://www.cnsta.net">China Seed Trade Association</a> Email: <a href="mailto:cnsta@263.net">cnsta@263.net</a>

**Conferences and Events:****China Seed Congress**

City: Sanya, Hainan province

Date: March 25-29, 2026

[https://www.chinaseed114.com/news/28/news\\_139822.html](https://www.chinaseed114.com/news/28/news_139822.html)

China Seed Congress is one of the most influential seed industry events in China, with more than 2,000 guests attending each year. Speakers include senior government officials, senior industry experts, and corporate executives. The event includes dialogues and exchanges on China's seed industry policies, industry development, intellectual property protection, breeding and cultivation and other topics. The event also features an exhibition area to display new varieties, new technologies and new achievements of grains, vegetables, and other products from various regions of the country.

**China International Seed Industry Expo and National Seed Information Exchange and Commodity Trading Fair**

City: TBC

Date: September 2026

The China International Seed Industry Expo is hosted by the Agricultural Trade Promotion Center of MARA and the Agricultural Industry Branch of the China Council for the Promotion of International Trade. The event promotes exchanges and cooperation between Chinese and foreign agriculture and seed industries, the application of new concepts, new varieties, and new technologies. Focus is given to China's seed industry and its innovation and development capabilities and international competitiveness. The National Agricultural Technology Center will release supply and demand forecasts for major seeds (hybrid corn and hybrid rice) at this event.

**Attachments:**

No Attachments.