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Post: Beijing

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Report Highlights:

China's seed industry has improved over the last ten years, but this year gained attention at the highest levels, including as a top priority for President Xi. High-level officials have stressed in remarks over the first half of 2021 that germplasm and breeding are key to China's agricultural stability and food security. Officials directed provincial and local governments to support improved seed development. With new attention on the planting seed sector coming through high-level meetings and in policy planning documents, there is a noticeable increase in the number of players in the Chinese seed sector. The 2020 administrative measures on foreign investment relaxed restrictions on foreign investment in wheat seed breeding. At the same time, China's hybrid corn and hybrid rice seed production both hit five-year lows in MY2020/21 for varied reasons.

I. GENERAL SITUATION

China is the second largest seed market in the world, behind the United States and annually plants 12.5 million tons of seed, with a market value of \$21 billion. According to official government reports, China is self-sufficient in rice and wheat seed and nearly self-sufficient in corn and soybean seed. While domestic vegetable varieties have improved, they still do not meet the diversified needs of the market and imports account for approximately 15 percent of all vegetable seed.

According to the Ministry of Agriculture and Rural Affairs (MARA), there were 6,393 seed companies registered by the end of 2020, a dramatic increase from just a few years prior when only 730 companies were registered in 2018. Over 65 percent of the newly added companies were registered at the county level, and industry attributes the increase to streamlined government reforms which encouraged growth. Henan and Gansu province rank first and second with 572 and 567 seed companies registered in each respectively.

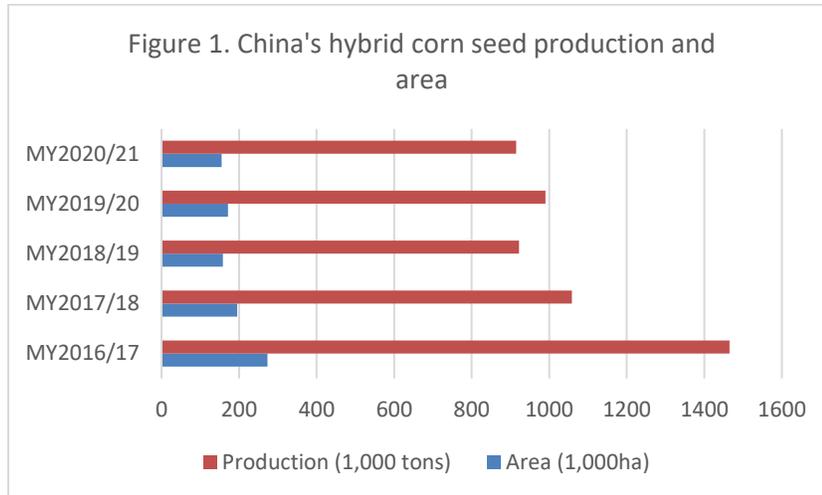
II. SEED MARKET

Corn

China's hybrid corn seed production is estimated at 915,000 tons in MY2020/21 (October-September), an eight percent decrease from MY2019/20 because of smaller corn seed planting area. MARA statistics show hybrid corn seed area decreased nine percent to 155,000 ha in MY2020/21. This is the smallest area in the last five years (see figure 1 below). Among the 155,000 ha, 134,000 ha is feed corn, 18,000 ha is silage corn, and 3,000 ha is food (sweet waxy) corn. Gansu and Xinjiang province are the largest corn seed producers in China, accounting for over 70 percent of total area.

The industry believes the decrease in corn seed planting area is due to large corn seed stocks and a decrease in corn seed prices in 2020 compared to the previous year. In addition, the private seed sector generally expects the approval for use of biotech varieties may accelerate soon and will replace current varieties. Seed producers have decreased production to avoid the risk of having large stocks of non-biotech seed on hand.

China's total corn seed supply in MY 2020/21 is estimated at 1.5 million tons, including 600,000 tons of carry-in stocks. MARA estimates MY2020/21 hybrid corn seed usage at 1.1 million tons, causing stocks to decrease to 400,000 tons.



(Source: National Agriculture Technology Extension Service Center, MARA)

Rice

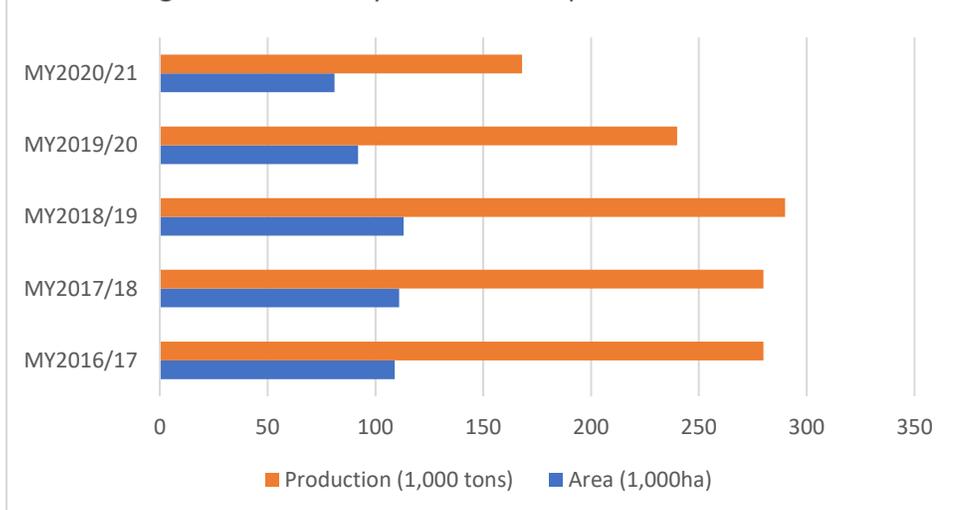
Hybrid rice seed production is estimated at 168,000 tons in MY2020/21, a 30 percent decrease from MY2019/20 (See figure 2 below) because of smaller planting area for seed and lower yield. MARA statistics show hybrid rice seed area decreased 12 percent to 80,667 ha in MY2020/21 due to low prices in MY2019/20. According to MARA data, the average hybrid rice seed price in 2020 was RMB 65.8/kg, over eight percent down from the previous year. Among the 80,667 ha, 13,713 ha is early rice, 52,433 ha is middle rice and 14,521 ha is late rice. The average yield of hybrid rice seed in MY2020/21 is 2,085 kg/ha, about a 20 percent decrease from the previous year due to bad weather conditions in major producing areas, such as Sichuan, Hubei, Hunan and Jiangsu provinces.

Hybrid rice acreage is expected to decline for two reasons. First, mechanized sowing has led to a substantial increase in seed usage. The high price of hybrid seed results in a substantial increase in overall seeding costs. At the same time, as Chinese consumers' requirements for higher quality food quality increases, conventional rice (mainly japonica rice) which is seen as having a better taste, has become more popular. However, use of hybrid seed could likely increase over time even as acreage decreases as mechanized and more efficient planting and harvesting become more widespread.

The total hybrid rice seed supply in MY 2020/21 is estimated at 290,000 tons, including 125,000 tons of carry-in stocks. MARA estimates MY2020/21 hybrid rice seed demand (domestic usage and exports) at 240,000 tons, maintaining stocks at 50,000 tons.

Conventional rice seed production is estimated at 917,000 tons in MY2020/21, a six percent increase from MY2019/20. MARA estimates MY2020/21 conventional rice seed usage at 750,000 tons, about a three percent increase from MY2019/20 as the result of a higher commercial use rates of conventional rice seeds.

Figure 2. China's hybrid rice seed production and area



(Source: National Agriculture Technology Extension Service Center, MARA)

Wheat

Winter wheat seed production is estimated at 4.9 million tons in MY2020/21, a six percent decrease from MY2019/20 due to unfavorable weather conditions in major production areas, such as Hebei and Shandong. Spring wheat seed production is estimated at 234,000 tons in MY2020/21.

Soybean

Soybean seed production is estimated at 674,000 tons in MY2020/21, with planting area at 264,700, about 17 percent and 7 percent increase respectively from MY2019/20 as a result of China's expansion of soybean acreage driven by high prices.

Cotton

Cotton seed production is estimated at 151,000 tons in MY2020/21, with planting area at 96,000 ha, both similar to MY2019/20. Among the 151,000 tons, hybrid cotton seed production is estimated at 1,020 tons and conventional cotton seed production is estimated at 150,000 tons.

III. TRADE

Imports

China's seed imports are forecast at 89,000 tons in MY2020/21, an eight percent increase from MY2019/20 due to strong demand for vegetable and grass seeds. Unlike many other products, the pandemic had little effect on China's seed imports (see table 1 below). The industry attributes this to strong government support for agricultural materials and inputs to ensure continuity of agricultural production.

Vegetable and grass seed are the top two imported seeds, accounting for over 80 percent of volume and 75 percent of value of total seed imports in MY2019/20. The United States remains the largest seed supplier to China, accounting for 25 percent of value and 55 percent of volume. Other major seed suppliers include Japan (fourteen percent), Denmark (ten percent), and Thailand (seven percent).

Table 1. China: Planting Seeds Imports from the World

HS Code	Description	Value (US\$1,000s)			Volume (ton)		
		10/17 - 09/18	10/18 - 09/19	10/19 - 09/20	10/17 - 09/18	10/18 - 09/19	10/19 - 09/20
BICO	Planting Seeds	461,984	455,975	447,365	76,991	74,470	82,497
100210	Rye Seed	13	1	0	25	0	0
100410	Oat Seed	2,500	3,088	4,909	3,986	5,221	8,170
100510	Corn Seed	3,207	4,851	4,949	218	494	391
100710	Sorghum Seed	375	3	2	45	0	2
12060010	Sunflower seeds	4,113	2,630	3,233	333	12	26
120770	Melon Seeds	9,046	11,403	9,342	25	32	34
120910	Sugar Beet Seeds	29,849	29,106	21,480	1,046	1,119	744
120921	Alfalfa Seeds	6,446	7,194	9,691	2,332	2,613	3,479
120922	Clover Seeds	12,329	8,152	8,412	3,250	2,196	2,457
120923	Fescue Seeds	30,947	24,833	22,095	14,060	10,567	11,512
120924	Kentucky Blue Grass Seeds	29,675	26,367	10,785	6,943	5,963	2,964
120925	Rye Grass Seeds	46,984	48,599	46,483	29,743	32,015	37,083
120929	Forage Seeds	107	85	360	5	3	13
120930	Herbaceous Seeds	43,835	35,957	37,207	77	28	323
120991	Vegetable Seeds	208,336	228,273	240,444	9,357	9,542	9,020
120999	Fruit and Spores Seeds	34,219	25,433	27,973	5,546	4,665	6,279

Source: China Customs

Table 2. China: Planting Seeds Imports from the United States

HS Code	Description	Value (US\$1,000s)			Volume (ton)		
		10/17-09/18	10/18-09/19	10/19-09/20	10/17-09/18	10/18-09/19	10/19-09/20
BICO	BICO-Planting Seeds	149,601	137,743	112,046	42,282	40,330	45,155
120925	Rye Grass Seeds	27,224	31,116	28,775	17,652	20,985	26,550
120999	Fruit and Spores seeds	20,869	17,734	18,119	2,592	2,034	3,297
120923	Fescue Seeds	29,011	21,603	18,033	13,178	9,139	9,265
120991	Vegetable Seeds	14,355	20,935	17,314	302	541	485
120930	Herbaceous Seeds	21,974	18,911	17,147	11	10	12
120924	Kentucky Blue Grass Seeds	26,148	23,955	9,590	6,045	5,344	2,598
100410	Oats Seed	274	920	1,469	436	1,579	2,470
120922	Clover Seeds	6,293	1,951	920	1,682	639	384
120921	Alfalfa Seeds	96	293	479	18	55	89
120770	Melon Seeds	34	81	43	1	1	0
100510	Corn Seed	0	10	10	0	2	3
12060010	Sunflower seeds	2,949	234	147	320	1	2
100710	Grain Sorghum Seed	374	0	0	45	0	0

Source: China Customs

China imposed additional tariffs on planting seeds on September 1, 2019. However, the tariff does not apply to grass (rye, Kentucky, fescue, and clover) and vegetable seed, which combined account for over 65 percent of China's total seed imports from the United States. Please see table 3 below for tariff schedule on U.S. planting seeds.

Table 3. China: Schedule of Tariffs on U.S. Planting Seeds

HS Code	Product Description	MFN* Rate	Section 232 Retaliatory	Section 301 Retaliatory*	Total Applied Tariff
	Implementation Date	Jan 1, 2020	Apr 2, 2018	Feb.14, 2020	Feb.14, 2020
10021000	Rye Seed	0%	0%	5%	5%
10031000	Barley Seed	0%	0%	5%	5%
10041000	Oats Seed	0%	0%	5%	5%

10071000	Grain Sorghum Seed	0%	0%	5%	5%
10089010	Other Cereals Seed	0%	0%	5%	5%
12011000	Soya Beans for Cultivation	0%	0%	5%	5%
12023000	Ground nuts, for cultivation	0%	0%	5%	5%
12077092	Red melon seeds	20%	0%	5%	25%
12077099	Other melon seeds	30%	0%	5%	35%
12072100	Cotton seeds, for cultivation	0%	0%	5%	5%
12091000	Sugar beet seed	0%	0%	5%	5%
12092990	Other forage seeds	0%	0%	5%	5%

Source: China Customs

*Eligible for exclusion by Chinese importers who complete the process

Vegetable Seed Imports

China's MY2020/21 vegetable seed imports are forecast at 9,500 tons, a 5 percent increase from MY2019/20 due to strong demand from China's vegetable production sector. However, the industry believes China's vegetable seed imports will trend downward in the coming years as China has eased market access requirements for foreign-invested crop seed companies since 2018. More foreign companies will likely move their vegetable seed production to China to avoid trade risks and reduce production costs with the recent opening of foreign investment into the vegetable seed business sector.

According to MARA statistics, annual vegetable seed use in China is approximately 100,000 tons. Local varieties account for more than 85 percent of the planted area with imported seeds making up the remainder. However, this percentage varies significantly among different vegetables. For example, imported seeds account for over 80 percent for broccoli and hybrid carrot, while less than 10 percent for peppers. Imported vegetable seeds come with high costs but provide equally high performance. Usually, greenhouse vegetable producers prefer more expensive foreign (both imported and domestically produced using foreign) seed for both higher yield and quality resulting in higher returns. While open field vegetable producers prefer cheaper domestic seeds.

Denmark, Thailand, Italy, and Indonesia supplied 80 percent of China's vegetable seed imports in MY 2019/20 by volume. Though Japan supplied less than three percent of the volume, it accounted for 20 percent of China's total vegetable seed imports due to its high unit price. According to China Customs

data, the unit price of imported vegetable seed from Japan in MY2019/20 was U.S. \$197,299/ton, while the average price from the world was U.S. \$26,658/ton.

Grass Seed Imports

Post forecasts grass seed (alfalfa, rye, fescue, clover, and Kentucky) imports at 63,000 tons, a 10 percent increase from MY2019/20 due to forage production demand. Industry contacts indicated the demand for lawn grass seeds may remain stable for the next few years with shrinking property market demand balanced out by expansion of public greening projects and public sports facility construction, namely soccer fields. In July 2019, the National Development and Reform Commission and General Administration of Sport jointly issued the “National Social Football Field Facilities Construction Special Action Implementation Plan (Trial)” to encourage more soccer field construction.

According to officials from China’s National Forestry and Grassland Administration, China’s current annual grass seed production is around 90,000 tons, a 40 percent decrease from 10 years prior, mainly due to its uncompetitive productivity. For example, domestic alfalfa seed yield is 450 kg/ha, while Canada’s yield is around 1,000 kg/ha (over 70 percent of China’s imported alfalfa seeds come from Canada). Grass seeds are relatively low value and cannot afford China’s expensive land prices. Meanwhile, in December 2020, the State Council released a directive to use all arable land for grain production which has the potential to further reduce China’s grass seed production if more grass seed land is converted to corn production.

The United States continues to be the largest seed exporter to China, accounting for 68 percent of China’s total grass seed imports in MY2019/20, followed by Denmark, Canada and New Zealand, with market share at 11, 9 and 6 percent respectively.

Exports

China’s seed exports are forecast at 30,500 tons in MY2020/21, about a five percent increase from MY2019/20 due to strong rice seed demand from the Philippines. According to China’s Customs data, China’s rice seed exports to the Philippines in the first five months of MY2020/21 increased 328 percent from the same period in the previous year, replacing Pakistan as the largest buyer of China’s hybrid rice seeds. Reports indicate the Philippines hybrid rice acreage is expanding due to higher yields than conventional varieties. Rice seed accounted for 76 percent of China’s total seeds exports in MY2019/20 by volume, although it only accounted for 33 percent by value. Meanwhile, vegetable seeds accounted for 13 percent of total seed exports by volume in MY2019/20, while it accounted for 50 percent by value.

As one of the largest hybrid rice seed exporters in the world, China’s hybrid rice seed has been welcomed by many markets for its quality. However, industry reports that China’s hybrid rice seed is losing its advantages internationally, for several reasons. First, the Chinese government restricts germplasm exports, which prohibits exports of new hybrid rice varieties resulting in exports of only outdated varieties. With the rapid development of international hybrid rice seed breeding technologies,

China's exported hybrid seeds no longer have the competitive advantage they once held. Second, many importing countries have encouraged increased local production of hybrid rice seed to ensure food secure food security. Finally, hybrid rice seed production costs in China are increasing while export prices are not rising in kind. Pakistan, the Philippines, and Vietnam are the largest buyers of Chinese rice seed, which combined account for 93 percent of China's total rice seed exports in MY2019/20.

China's MY 2020/21 vegetable seed exports are forecast at 3,900 tons, stable from the previous year. The Netherlands, South Korea, Japan, Vietnam, and the United States are the largest buyers of China's exported vegetable seeds, accounting for about 60 percent of China's vegetable seed exports in MY2019/20.

Table 4. China: Seed Exports to the World

HS Code	Description	Value (US\$1,000s)			Volume (ton)		
		10/17 - 09/18	10/18 - 09/19	10/19 - 09/20	10/17 - 09/18	10/18 - 09/19	10/19 - 09/20
BICO	Planting Seeds	236,152	239,911	240,743	23,679	27,903	29,130
100111	Durum Wheat Seed	0	0	0	0	0	0
100191	Wheat Seed,	0	16	0	0	45	0
100410	Oats Seed	0	0	0	0	0	0
100510	Corn (Maize) Seed	2,259	2,697	3,224	685	725	806
10061021	Long rice seeds	57,412	63,596	73,185	16,568	18,142	20,574
10061029	Other rice seeds	0	9,974	5,512	0	3,054	1,695
100710	Grain Sorghum Seed	103	121	0	15	28	0
120110	Soybean Seed	298	465	296	77	125	79
120230	Peanut Seed	54	1	39	19	0	19
120721	Cotton Seeds	107	1	79	7	0	5
12077010	Melon Seeds	29,487	20,180	15,346	266	202	146
120910	Sugar Beet Seeds	0	0	1	0	0	0
120921	Alfalfa Seeds	225	270	221	77	93	82
120922	Clover Seeds	4	0	0	0	0	0
120923	Fescue Seeds	15	0	0	4	0	0
120925	Rye Grass Seeds	4	9	0	0	3	0
120929	Forage Seeds	1,050	1,120	1,130	369	367	437
120930	Herbaceous Seeds	16,305	17,321	18,377	668	782	859
120991	Vegetable Seeds	124,861	120,189	119,375	4,359	3,803	3,803
120999	Fruit Seeds	3,968	3,951	3,958	565	534	625

Source: China Customs

IV. POLICY

Seeds Highlighted as A Priority At Highest Levels of Chinese Government

China's seed industry has been steadily improving over the last ten years, but this year has gained attention at the highest levels, including as a top priority for President Xi. Several high-level officials have stressed in remarks over the first half of 2021 that germplasm and breeding are key to China's agricultural stability and food security and direct provincial and local governments to support improved seed development.

Third Annual China Seed Congress Held in Hainan

The 3rd China Seed Congress was held March 20-24, 2021 in Hainan Province. Over 3,000 attendees from Chinese government agencies, research institutes, and the private sectors attended on site, the largest event to date. Key speakers included the Governor of Hainan Province, the MARA Vice Minister responsible for planting seeds and a Vice Minister from the Supreme People's Court. The Congress consisted of a main forum and 12 sub-forums, covering rice seeds, corn seeds, vegetable seeds, aquatic and animal genetics, the Hainan Free Trade Zone, digital agriculture, and IPR among others. Throughout the Congress IPR, PVP, EDV, and biotech were hot topics addressed by many different speakers.

Central Economic Work Conference Mentions Seed for the First Time

The Party Central Committee holds a high-level economic work conference each year to summarize the economic work of the year and lay out economic priorities for the coming year. The year 2021 will be the first year of the "14th Five-Year Plan", and the meeting listed eight key tasks to be grasped next year. Among them, "solving the problem of seeds and arable land" has garnered much attention since it is the first time solving the seed problem has been highlighted at the central economic work conference.

The conference highlighted several priorities as key to ensuring food security and in implementing the strategy of storing grain on the ground and storing grain on technology. It is also necessary to strengthen the protection and utilization of germplasm resources and strengthen the construction of seed banks. In addition, the conference called on people to respect science, adhere to strict supervision, and orderly promote the industrial application of biotech breeding.

While this is the first-time seed improvement has been featured in the economic conference, it is notable that no specific measures, requirements, or timeline were laid out to work toward this goal.

On February 21, the CPC Central Committee and the State Council jointly issued the annual policy guidelines on agriculture and rural development, known as the "No. 1 Document". The 2021 No. 1 Document has set commercialization of high-quality seeds and livestock genetics as important factors for national food security, while stable supplies of grains and pork remain important. The central governments emphasis on supporting seed development, including biotech seeds, is a new feature in the 2021. More details of the No. 1 document can be found in [GAIN Report CH2021-0041](#)

The seed industry received significant attention and private investment since the Central Economic Work Conference was held in December 2020. Several contacts noted that, so far, no substantive support policies have been introduced. However, it is said that local government departments are investigating and studying the matter, and support policies are expected to be introduced soon.

Increased Focus on IPR

The seed industry is increasing its focus on IPR. During the national seed congress, almost every speaker gave some mention of the need to strengthen IPR protection and enforcement. While China still has a long way to go on this front, the fact that it was a hot topic across many sessions at the congress is promising. Industry contacts validated this importance across many different conversations. There is a growing recognition that without real IPR protection, there will be no growth or improvement of the seed industry, a marked difference from the past.

In working towards this, the Hainan Free Trade Port Intellectual Property Court established last year as only the fifth intellectual property court in the whole country. This also strengthens the protections and importance of Hainan to the seed industry. The Vice Minister of the Supreme People's Court also pointed out at the Seed Congress that it is necessary to further clarify the new plant variety judgment rules, to further unify the judicial judgment standards and increase judicial protection.

The Supreme People's Court released its draft for comment on March 23, 2021 "Several Provisions of the Supreme People's Court on the Specific Application of Law Issues in the Trial of Disputes over Infringement of the New Plant Varieties Rights (2) for public Comments. No date has yet been set when the final version of the document may be released. Full text of the draft in Chinese is available [here](#).

Foreign Investment Negative List

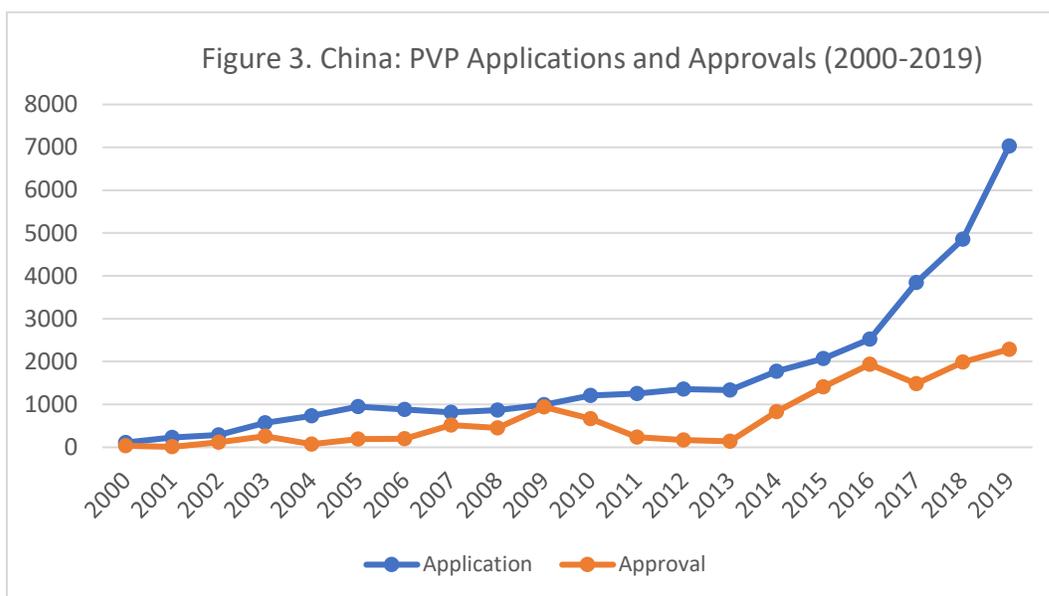
On June 23, 2020, the National Development and Reform Commission and the Ministry of Commerce jointly issued the Special Administrative Measures on Access to Foreign Investment (2020 edition) ("2020 National Negative List"), which took effect on July 23, 2020. The 2020 National Negative list relaxed restrictions on wheat seed breeding. The selection and breeding of new wheat varieties and the production of the seeds are no longer required to be controlled by the Chinese partner. However, the Chinese partner should hold a share ratio of not less than 34 percent. Currently there is still no change to corn seed investment which still requires Chinese control. The full list in Chinese is available via: <http://www.mofcom.gov.cn/article/ae/ai/202006/20200602977244.shtml>

China Moves Toward Plant Variety Protection Regulations

On February 2, 2019, the MARA released the Draft Version of the People's Republic of China Plant Variety Protection Regulations for public comment. The draft has been under review by the Ministry of Justice since the end of the comment period and according to MARA officials, the draft is still currently under review with no indication of when the final regulation may be released. Some experts indicate that there are still some disputes among stakeholders on major amendments. These include essentially

derived varieties (EDVs), cancellation of the protection categories (all crops can apply for PVP, not only crops listed in the categories), and extension of the protection period that conflicts with the current Seed Law. Several speakers at the China National Seed Congress, including Vice Minister Zhang Taolin, mentioned that China would amend its Seed Law to improve the protection on new varieties and encourage original innovation. China’s Seed Law was amended in November 2015 and came into effect on January 1, 2016. MARA tried to incorporate the EDV concept when the Seed Law was last revised but the initiative failed.

Despite the continued delayed release of the new PVP regulations, China’s annual PVP application numbers have been the highest among UPOV members for three consecutive years. China received 39,000 PVP applications and granted 15,000 approvals by the end of October 2020. The PVP Office received 7,032 applications and granted 2,288 approvals in 2019. The upward trend of PVP applications in China indicates improvement of the industry’s breeding ability and increasing awareness of the importance of plant variety protection.



Biotechnology and Planting Seeds

Please refer to [CH2020-0161](#) (Agricultural Biotechnology Annual) for detailed information on China’s biotechnology sector developments.

On July 15, 2020, MARA issued biosafety certificates for cultivation to herbicide-tolerant corn DBN9858 of Beijing Da-Bei-Nong Technology Group and herbicide-tolerant soybean Zhonghuang 6106 of Crop Science Institute of the Chinese Academy of Agricultural Sciences. Given the two GE corn products and one soybean product that obtained biosafety certificates for cultivation in January 2020, there are now five domestically developed traits waiting for variety registration for commercialization (in addition to GE cotton and papaya). However, China still has not published a regulation establishing a path to variety registration for GE crops other than cotton and papaya.

Biotechnology in the seed industry was one of the central topics at the 2020 Seed Congress. MARA's Vice Minister in attendance stated "both conventional breeding and biotech breeding must be taken into consideration together. The key is to highlight the innovation and application of modern biotech breeding under the premise of maintaining the advantages of conventional breeding. It is necessary to promote the commercialization of biotechnology breeding in an orderly manner." Speakers from the private sector highlighted the importance of biotechnology. The private sector believes that the liberalization of genetically modified varieties is a win-win that would bring a potential production increases of up to 30 percent.

The head of one of China's largest seed companies shared that the value of China's seed market could grow by an additional U.S. \$2 billion by 2025 from current projections if the commercialization of genetically modified varieties is approved in 2022, and the market of corn and soybean will expand over 30 percent. A leader at another large seed company estimates the commercialization of biotech breeding will increase corn yields by 10-15 percent and save 4 million ha of land but with the same production. The same contact estimates biotech varieties have the potential to increase soybean yields by 10 percent. Overall, the attitude and reception toward biotech at the Congress was positive, from private sectors to research institutes and government departments.

A leader at a major corn seed company believes the major hurdles to biotech adoption are concerns from the public over their safety, and the strong influence of agrochemical industry which is opposed to biotech as those varieties would use fewer inputs which would harm their interests.

VAT Free Policy on Seed Imports

China's value-added tax (VAT) exemption policy on seed imports has been implemented since 2006. In May 2021, the State Council announced the policy will continue under the 14th Five-Year Plan until December 31, 2025. The Council tasked three agencies to formulate a list of eligible seeds. The Ministry of Finance, the General Administration of Customs, the State Administration of Taxation, and MARA together will formulate a list of seeds eligible for such duty-free import. To date, this exemption has only applied only to seeds for self-use and not traded seeds, which prevents most U.S. seeds from benefiting from the policy. The full text in Chinese can be found [here](#).

Attachments:

No Attachments.