

M&A Boom in China's Seed Industry

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Abstracts

INTRODUCTION

China is a large agriculture country, and the annual usage of seed is more than 12.5 billion kg. Following the USA, China has become the second largest seed market in the world. As the fast increasing of seed commercialization rate, the market size of China's seed industry rose rapidly, up to about RMB100 billion in 2014 from RMB25 billion in 2000.

However, compared with the developed countries such as the USA and Japan, the industrial concentration rate of China's seed industry is low, and the overall strength of China's seed enterprises and competitiveness is weak. In recent years, China's government has issued series of policies and measures to support the seed industry reform.

According to the Development Guide of National Modern Crop Seed Industry (2012-2020), up to 2020, the market share of top 50 seed enterprises will reach 60% in China. China has seen a wave of M&A in seed industry in recent years. In 2010, there were about 8,700 enterprises holding a permit for management of seed sales, while in 2014 it down to less than 5,000. What's more, the M&A boom will continue in future few years. Obviously, with advantages of R&D and financial strength, large scale enterprises have developed fast, and will become more competitive in global market.

In this report, ASKCI analyzes the market size of seed industry, supply and demand of seed, major causes of M&A causes in seed industry, experience from transnational enterprises' M&A cases, as well as make a comprehensive & in-depth analysis the M&A cases in some major domestic large scale seed companies.

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