

China Paddy & Paddy Seed Industry Report, 2007-2008

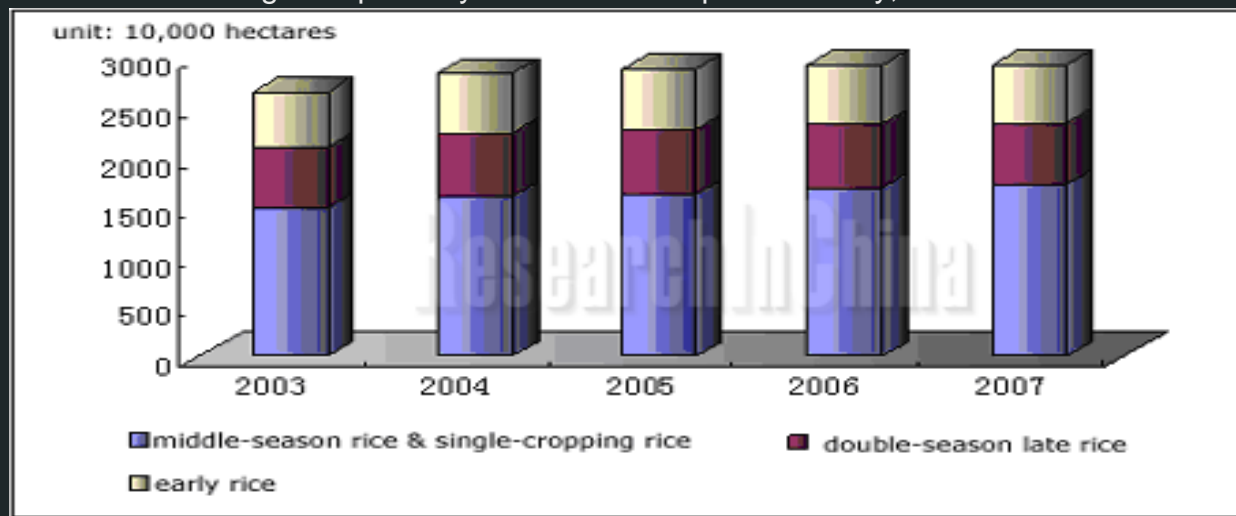


- It was estimated by China National Grain and Oils Information Centre that China's cultivated areas of paddy were about 29.23 million hectares in 2007, down 2.39% against the previous year, or reducing by 70,000 hectares. However, the output of paddy totaled 186.5 million tons in 2007, up 2.15% over the year of 2006 or increasing by 3.93 million tons. In general, the market prices of paddy in 2007 were higher than the previous year. In addition, the central government has also intensified strong support to rice production to raise the minimum purchasing price of rice. Therefore, it is predicted that China's cultivated areas of paddy in 2008 will have an increase against last year.

- In 2007, the cultivated areas of early paddy and double cropping paddy both suffered a decrease, while that of middle-season paddy and single-cropping late price both enjoyed an increase, because of a buildup in rural migrant workers and a low agricultural yield.

The cultivated areas of early paddy and double-cropping paddy totaled 11.97 million hectares in 2007, down 2.92% against the previous year or reducing by 360,000 hectares. The cultivated areas of middle-season paddy and single-cropping late paddy were 17.26 million hectares in 2007, up 1.71% against the previous year or increasing by 290,000 hectares.

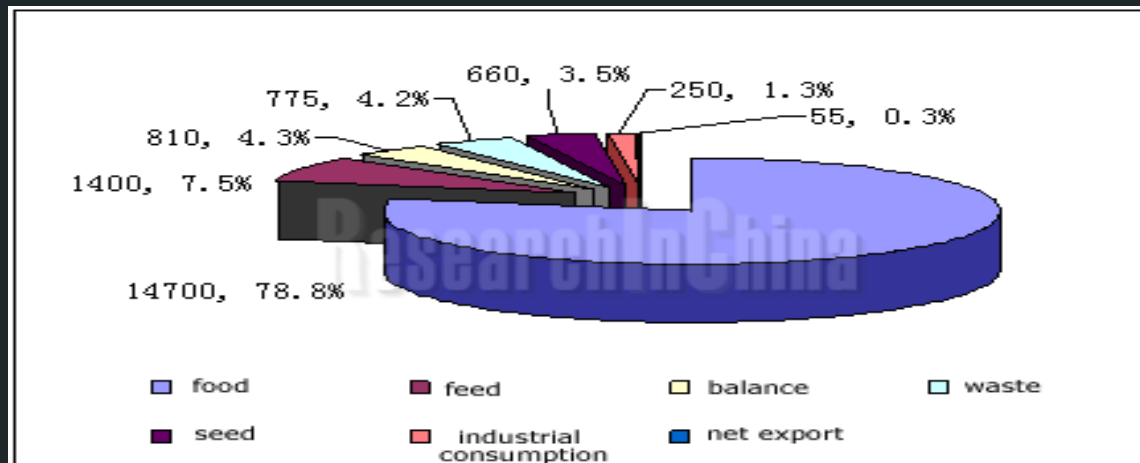
Changes of Cultivated Areas and Total Output of Early Paddy, Mid-season Paddy, Single-crop Paddy and Double-crop Late Paddy, 2003-2007



Source: ResearchInChina

- China's paddy consumption mainly covers the six aspects of food, feed, industrial consumption, seed industry, net export and losses & waste. It was predicted that the food consumption in the period of October, 2007 to September, 2008 will account for 78.8% of the total, the industrial consumption 1.3% and the feed consumption 7.5%.
- According to the following chart, we can estimate that China's paddy supply and demand in the period of October of 2007 to September of 2008 will be relatively relaxed, but paddy consumption will still have the problems regarding species and regional imbalance with the features that "paddy market in the south is larger than that in the north" and "the consumption of indica paddy is larger than japonica paddy". (Indica paddy is planted in the south region and japonica paddy is planted in the north region)

Consumption Ratio in the Period of October, 2007-September, 2008



Source: ResearchInChina

- Based on the authoritative and abundant information from the National Bureau of Statistics, the China National Grain and Oils Information Centre and the General Administration of Customs of China, this report makes an in-depth study on the market status, main policies, supply & demand and key companies of paddy & paddy seed industry and forecasts the supply and demand as well as the development trend of the industry in the period of October, 2007 to September, 2008.



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