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Planting Seeds

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Report Highlights:

Japanese seed imports in 2002 were \$121,905,000, down 14.6% from \$142,690,000 the previous year. The U.S. share, as leading seed supplier to Japan, was 29.6% of the total dollar volume, at \$36,093,000. The dollar value of seed exports from Japan, on the other hand, increased 2.1% from the previous year to \$82,817,000 in 2002. Registered seed varieties gained increased protection under Japan's revised Seeds & Seedlings Act, enacted in June and effective July 8, 2003.

Includes PSD Changes: No
Includes Trade Matrix: Yes
Annual Report
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Executive Summary

Japanese seed imports in 2002 were \$121,905,000 on a Japanese customs clearance basis, down 14.6% from \$142,690,000 in the previous year. The U.S. share, as leading seed exporter to Japan, was 29.6% of the total dollar volume, at \$36,093,000. The dollar value of seed exports to the world from Japan, on the other hand, increased 2.1% from the previous year to \$82,817,000 in 2002. The U.S. share, as a dominant supplier of seeds, was 24% of Japanese vegetable seed imports, 91% of sweet corn seeds, 43% of forage crop seeds, 54% of pea/bean seeds, and 38% of other miscellaneous crop seeds in 2002.

Japanese phytosanitary regulations on seed imports are not a significant impediment to the seed trade with Japan. Japan subscribes to the International Convention on the Protection of New Plant Varieties and registered seed varieties are protected under Japan's Seeds & Seedlings Act, revised most recently in June 2003 to improve enforcement.

The number of new seed variety applications for legal protection made to the Ministry of Agriculture, Forestry and Fisheries (MAFF) during Japan's fiscal year (FY) 2002 (April–March), dropped 13% from the previous year to 1002 cases. The number of new seed varieties registered during the same period declined 7.5% from the previous year to 1,119 cases. The cumulative number of officially registered seed varieties planted and grown outside Japan through March 2003 was 3,027, up from 2,775 the previous year.

Production

With Japan's domestic farm sector showing continuing signs of stagnation in farm production, the focus of Japanese seed business trade continues to be international operations. Statistical information for domestic seed production is not available.

Trade

Imports

Japanese planting seed imports were \$121,905,000 in 2002, down 15% from \$142,690,000 in 2001. In quantity, the imports dropped 3% from 101,468 metric tons (MT) in 2001 to 98,166 MT in 2002. Imports of all seed categories, including vegetable seeds, forage crop seeds, herbaceous plant seeds and sweet corn seeds, all declined correspondingly.

Japanese seed imports from the U.S. in 2002 dropped 21% in dollar value but grew 18% in quantity from the previous year. U.S. exports of forage crop seeds, which account for 83% of Japan's seed imports from the U.S., grew by 42% by quantity in 2002.

Japanese Seed Imports from the World				
Seed Group	Quantity (Metric Tons)		Value (US \$000) 1/	
	2001	2002	2001	2002
Vegetable Seeds	6,323	5,543	63,089	55,863
Sugar Beet Seeds	73	0	3,405	0
Forage Crop Seeds	89,791	89,344	37,723	34,491
Herbaceous Plant Seeds	844	467	20,890	18,651

Pea/Bean Seeds	1,070	834	3,350	28,91
Sweet Corn Seeds	304	191	3,339	2,417
Other Planting Seeds	3,063	1,787	10,894	7,592
Total:	101,468	98,166	142,690	121,905

Japanese Seed Imports from the U.S.				
Seed Group	Quantity (Metric Tons)		Value (US \$ 000) 1/	
	2001	2002	2001	2002
Vegetable Seeds	1,782	1,357	17,888	13,457
Sugar Beet Seeds	3	0	99	0
Forage Crop Seeds	8,995	12,781	16,256	15,151
Herbaceous Plant Seeds	113	61	2,460	1,321
Pea / Bean Seeds	698	551	1,804	1,775
Sweet Corn Seeds	284	148	3,055	1,956
Other Planting Seeds	1,165	470	4,145	2,403
Total:	13,031	15,368	45,707	36,093

(Source: Ministry of Finance Customs Data)

Note: 1/ Based on Japanese customs dollar value, CIF/ Japanese port-of-entry.

Japanese calendar-year seed imports through April 2003 were \$18,512,000, with the U.S. share accounting for 35% of the total import value. The U.S. share for 2002 was 24.1%. Despite declines in the quantity and value of Japanese seed imports, the U.S. remains the leading supplier of planting seeds to Japan, as shown below.

Leading Seed Exporters to Japan
(By Value: \$000 / CIF-Japan)

Vegetable Seeds				
Japanese Imports From:	2002 (Full Year)		2003 (Update: Jan.-Apr.)	
	Value (\$000)	% Share	Value (\$000)	% Share
The World	55,863	100%	18,512	100%
1) U.S.A.	13,457	24.1%	6,482	35.0%
2) Italy	9,024	16.2%	4,080	22.0%
3) Chile	5,701	10.2%	557	3.0%

4) Korea, South	4,957	8.9%	495	2.6%
5) China	3,189	5.7%	1,263	6.8%

Sweet Corn Seeds				
Japanese Imports From:	2002 (Full Year)		2003 (Update: Jan.-Apr.)	
	Value (\$000)	% Share	Value (\$000)	% Share
The World	1,735	100%	1,348	100%
1) U.S.A.	1,725	99.4%	1,325	98.3%
2) Chile	11	0.6%	4	0.3%
3) Taiwan	2	0.1%	0	0

Forage Crop Seeds				
Japanese Imports From:	2002 (Full Year)		2003 (Update: Jan.-Apr.)	
	Value (\$000)	% Share	Value (\$000)	% Share
The World	34,491	100%	15,780	100%
1) U.S.A.	15,151	43.9%	7,699	48.7%
2) Australia	12,830	37.2%	1,514	9.6%
3) France	1,169	3.4%	2,078	13.1%
4) Austria	1,080	3.1%	1,821	11.5%
5) Canada	686	2.0%	745	4.7%

Herbaceous Seeds				
Japanese Imports From:	2002 (Full Year)		2003 (Update: Jan.-Apr.)	
	Value (\$000)	% Share	Value (\$000)	% Share
The World	18,651	100%	7,545	100%
1) Chile	6,528	35.0%	4,667	61.9%
2) China	4,151	22.3%	312	4.1%
3) Netherlands	3,108	16.7%	1,009	13.4%
4) U.S.A.	1,321	7.1%	560	7.4%
	778	4.2%	91	1.2%

5) Guatemala				
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Pea / Bean Seeds				
Japanese Imports From:	2002 (Full Year)		2003 (Update: Jan.-Apr.)	
	Value (\$000)	% Share	Value (\$000)	% Share
The World	2,891	100%	873	100%
1) U.S.A.	1,775	61.4%	649	74.3%
2) Korea, South	409	14.1%	0	0
3) Thailand	144	4.9%	36	4.1%
4) Netherlands	123	4.3%	75	8.6%
5) Chile	100	3.5%	0	0

Other Miscellaneous Plant Seeds				
Japanese Imports From:	2002 (Full Year)		2003 (Update: Jan.-Apr.)	
	Value (\$000)	% Share	Value (\$000)	% Share
The World	7,592	100%	3,551	100%
1) U.S.A.	2,403	31.6%	1,046	29.5%
2) China	2,042	26.9%	1,188	33.4%
3) Korea (South)	652	8.6%	556	15.6%
4) New Zealand	148	1.9%	52	1.5%
5) Netherlands	144	1.9%	92	2.6%

Exports

Japanese seed exports in 2002 declined slightly in quantity but grew 2.1% in dollar value, from the previous year. Shipments to the U.S. accounted for 18% of the Japanese seed exports, up 5% by value and more than doubled by volume, in 2002.

Japanese Seed Exports to the World				
Seed Group	Quantity (Metric Tons)		Value (US \$000) 1/	
	2001	2002	2001	2002
Vegetable Seeds	1,418	1,249	57,702	56,044
Forage Crop Seeds	16	141	251	151
		36		23,549

Herbaceous Plant Seeds	51		20,469	
Other Planting Seeds	282	326	2,628	3,073
Total:	1,767	1,752	81,110	82,817

(Source: Ministry of Finance Customs Data.)

Note: 1/ Based on Japanese customs dollar value, FOB/Japanese ports of export.

TO THE U.S. - BY SEED GROUP				
Seed Group	Quantity (Metric Tons)		Value (US \$000) 1/	
	2001	2002	2001	2002
Vegetable Seeds	36	43	3,506	4,041
Forage Crop Seeds	13	67	223	132
Herbaceous Seeds	4	6	10,203	10,451
Other Planting Seeds	5	8	258	274
Total:	58	124	14,190	14,898

(Source: Ministry of Finance Customs Data.)

Note: 1/ Based on Japanese customs dollar value, FOB/Japanese ports of export.

Harmonized System – Tariff Codes for Planting Seeds in Japan

Reference: HS (Harmonized System) tariff codes, used in statistical tabulation for each seed grouping		
Seed Group	Imports	Exports
Vegetable Seeds	1209.91-010; 1209.91-090	1209.91-000
Sugar Beet Seeds	1209.11-000; 1209.19-000	None
Forage Crop Seeds	1209.21-000; 1209.22-000; 1209.23-000; 1209.24-000; 1209.25-000; 1209.26-000; 1209.29-000; 1002.00-010; 1004.00-010; 1005.10-010; 1007.00-010; 1008.10-010; 1008.90-010;	1209.21-000; 1209.22-000; 1209.23-000; 1209.24-000; 1209.25-000; 1209.26-000; 1209.29-000;
Herbaceous Seeds	1209.30-000	1209.30-000
Pea / bean Seeds	0713.10-010; 0713.10-211; 0713.20-010; 0713.33-010; 0713.33-210; 0713.39-010; 0713.39-210; 0713.40-010; 0713.50-010; 0713.50-210; 0713.90-010; 0713.90-210	None

Sweet Corn Seeds	0712.90-031	None
Other Planting Seeds	1209.99-000	1209.99-000

Tariffs

With the exception of seeds included in the in the table below, there is no import duty for planting seeds.

Crop	HS Code (Harmonized System)	Tariff Rates (WTO)
Pea Seeds	0713.10.211	6.0 %
Kidney Bean Seeds	0713.33.210	6.0 %
Broad Bean Seeds	0713.50.210	6.0 %
Other Seeds	0713.39.210	6.0 %
Other Seeds	0713.90.210	6.0 %

(Source: Customs Tariff Schedule of Japan – 2002)

Seed and Plant Protection Policy: (Revised Japanese Seeds and Seedlings Act)

Planting seeds are primarily regulated under the Seeds and Seedlings Act (the Act). The Act was revised in 1998, as a result of the 1991 revision in the International Convention for Protection of New Plant Varieties (UPOV), to which Japan is a signatory. The Act was revised again in June 2003, effective July 8, 2003.

The most recent revision responds to infringements on property rights holders and includes greater protection for these owners. Recent infringements include a Japanese farmer selling strawberry seeds to Korean and Chinese farmers without approval from the original breeder and trading companies selling new vegetable varieties to corporate growers in Korea and China for production and re-export as finished products to Japan. The revised Act provides added protection against illegal production, sale and trade of the registered varieties, including stronger criminal provisions.

Key components of the revised Act include:

1. Expanding the scope of products covered under the penal regulations to include not only transactions involving seeds, but also crops.
2. Raising the maximum amount of the penal fine for corporate violators from 3 million yen to 100 million yen.

In line with the revision of the Seeds and Seedlings Act, Japanese Customs Law was also amended in March 2003, to authorize Japanese customs officials to order confiscation, disposition, or destruction of imported planting seeds or crops that violate provisions of the Act.

Variety Registrations

There were 1,002 applications for legal protection under the Act made to MAFF in FY 2002 (April-March), down from 1152 the previous year. There were 1,119 new variety registrations in 2002, down from 1,210 the previous fiscal year.

Crops	Applications		New Variety Registrations	
	2001	2002	2001	2002
Edible Crops	46	42	45	63
Vegetables	48	47	63	62
Fruits	58	39	29	39
Forage Crops	12	10	24	15
Herbaceous Plants	814	643	771	719
Ornamental Plants	159	190	222	176
Forest Trees	1	1	2	1
Others	19	30	54	44
Total:	1,157	1,002	1,210	1,119

(Source: Ministry of Agriculture, Forestry and Fisheries)

Japan relies on other countries for cultivation and development of seeds. As of March 2003, there were 3,027 seed registrations for seeds grown outside Japan made with MAFF.

Country	Registered (Applied)	Edible Crops	Vegetables	Fruit Trees	Forage Crops	Herbaceous Plants	Ornamental Plants
Israel	174 (263)	-	1 (1)	-	-	173 (263)	-
Thailand	12 (22)	-	1 (1)	-	-	11 (21)	-
China	5 (8)	5 (5)	-	0 (2)	-	0 (1)	-
Korea	0 (2)	-	-	-	-	0 (2)	-
Taiwan	2 (9)	-	2 (2)	-	-	0 (7)	-
Netherlands	1,152 (1,668)		9 (11)			903 (1,291)	240 (366)
Germany	537 (768)					268 (446)	269 (322)
France	241 (316)	1 (6)	1 (2)	5 (8)		105 (132)	129 (168)
Italy	137 (216)					108 (175)	29 (41)

U. K.	165 (270)		2 (2)	7 (7)		86 (158)	70 (103)
Denmark	127 (222)					76 (116)	51 (106)
Ireland	0 (7)					0 (6)	0 (1)
Belgium	3 (11)			0 (1)		1 (7)	2 (3)
Switzerland	1 (7)			0 (2)		1 (5)	
Spain	3 (4)					2 (3)	1 (1)
Austria	0 (1)					0 (1)	
Sweden	1 (1)						1 (1)
Norway	1 (1)						1 (1)
Slovakia	1 (1)					1 (1)	
Poland	4 (4)					4 (4)	
Portugal	1 (1)						1 (1)
U.S.A.	359 (565)	1 (1)	16 (24)	4 (6)	8 (10)	213 (375)	117 (149)
Argentina	0 (1)					0 (1)	
Ecuador	0 (1)						0 (1)
Costa Rica	6 (21)					6 (21)	
Canada	2 (3)					0 (1)	2 (2)
Mexico	0 (1)						0 (1)
Brazil	4 (7)			1 (1)		3 (6)	
Australia	47 (100)			0 (2)		47 (94)	0 (4)
New Zealand	41 (72)			2 (11)		7 (18)	32 (43)
South Africa	1 (8)					1 (7)	0 (1)
Total	3,027 (4,581)	7 (12)	32 (43)	19 (40)	8 (10)	2,016 (3,161)	945 (1,315)

End of report.