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Korea, Republic of

Planting Seeds

Update of Trade and Production

2005

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Report Highlights:

In MY 2004/05, the United States maintained its position as the major supplier of grass and forage seeds in the Korean market with a market share of 58 percent (on a quantity basis). U.S. market share was down 6 percent from the previous year. Dairy herd contraction suggests less pasture requirements and a potential weakening in future import demand for grass and forage seeds. Nevertheless, U.S. rye seed exports to Korea are expected remain robust on the basis of government support for green manure crops authorized through 2010.

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Seoul [KS1]
[KS]

Imports Up 5 Percent in 2004/05

In MY 2004/05, Korean planting seed imports increased to 14,759 MT, up 5 percent from the previous year. Increased vegetable seed imports as well as herbaceous plant seed and tree seed imports offset slight declines in grass and forage seed imports. The value of planting seed imports also increased to US\$ 54 million, up 20 percent from MY 2003/04.

Trade data for the first three months of MY 2005 indicate that the United States will continue to be a major supplier of grass, forage and lawn seed in the Korean planting seed market in MY 2005. As the government's "Green Manure Plan" campaign is expected to continue through 2010, rye seed imports from the United States and Canada are expected to remain robust.

Green Manure Campaign Driving Rye Seed Imports

The Korean government has encouraged farmers to cultivate forage for fertilizer in rice fields under the "Green Manure Plan" campaign since CY 2002. Farmers have received a 100 percent subsidy for the cost of planting seed under the Green Manure Plan. Planting seed imports of forages are expected to increase in MY 2005/06 to meet the greater demand generated by the government campaign.

U.S. Market Share Down Slightly in 2004/05

The United States maintained the position of the major supplier of grass and forage seeds in the Korean market. In MY 2004/05, U.S. market share of grass and forage seeds in Korea decreased to 58 percent from 64 percent in the previous year (on a quantity basis) due to smaller imports of U.S. rye seed and other grass. Increased imports of Chinese other grass and Canadian rye resulted in an increase in those countries' market share. The U.S. presence in the Korean seed market is strengthened by its broad array of seeds, such as: corn, rye, Lucerne seed, clover seed, ryegrass, timothy grass, fescue seed, Kentucky bluegrass, Sudan grass, orchard grass and lawn seed.

The U.S. share of the US\$ 10 million imported grass and forage seed market stood at 58 percent, on a quantity basis, and 66 percent, on a value basis. The United States' competitive position in the imported grass and forage seed market should remain strong over the next three to five years due to superior seed varieties. The U.S. garnered 13 percent of the \$33 million market for imported vegetable seeds on a quantity basis and 6 percent on a value basis.

In addition to the United States, several other countries compete to supply planting seeds to the Korean market. Australia supplies oat, sorghum, Lucerne seed and Sudan grass. Japan supplies vegetable seed and herbaceous plants. Canada supplies rye, oat, fescue seed and lawn seed. China competes on the Korean market with Chinese Milk Vetch (within the category of other grasses) used for green manure purposes. China also supplies herbaceous plants, fruit tree seed, vegetable seed, lawn seed and flower seed.

Note: FAS/Seoul issues a full "annual" planting seed report on a biennial basis. This interim report focuses chiefly on trade and recent developments. The last full report ([KS4044](#)) is available at www.fas.usda.gov under "[Attaché Reports](#)". The next full report will be released in October 2006.

KOREA: MY2004/2005(July/June) Planting Seed Imports (Unit: KG,US\$1,000 based on CIF)				
COMMODITY	FROM WORLD		FROM THE U.S.	
	VOLUME	VALUE	VOLUME	VALUE
	KG	US\$1,000	KG	US\$1,000
CORN	200,047	1,441	199,880	1,440
RYE	6,200,680	3,528	3,469,600	1,952
OATS	505,780	272	21,840	11
LUCERNE SEEDS	43,911	186	17,602	106
CLOVER SEED	15,340	62	11,960	43
FESCUE SEED	663,814	983	651,858	964
KENTUCKY BLUEGRASS	346,981	1,402	346,981	1,402
RYEGRASS	797,556	1,486	720,792	1,316
TIMOTHY GRASS	5,520	15	4,981	14
SUDANGRASS	798,671	1,478	651,051	936
ORCHARDGRASS	120,897	224	84,574	150
OTHERGRASS	1,596,410	2,195	38,673	89
LAWN SEED	865,551	1,952	793,297	1,686
SUB. TOTAL	12,161,158	15,224	7,013,089	10,109
VEGETABLE SEEDS	1,919,772	33,036	244,465	1,991
HERBACEOUS PLANTS	136,180	3,306	15,361	1,247
SEEDS OF OTHER FOREST TREE	37,541	317	3,170	103
SEED OF FRUIT TREE	91,042	31	35	4
OTHER	413,745	1,943	65,126	117
SUB. TOTAL	678,508	5,597	83,692	1,471
TOTAL	14,759,438	53,857	7,341,246	13,571

KOREA: MY2003/2004(July/June) Planting Seed Imports (Unit: KG,US\$1,000 based on CIF)				
COMMODITY	FROM WORLD		FROM THE U.S.	
	VOLUME	VALUE	VOLUME	VALUE
	KG	US\$1,000	KG	US\$1,000
CORN	234,990	1,647	234,990	1,647
RYE	6,538,880	4,146	3,799,980	2,333
OATS	557,160	326	20,000	12
LUCERNE SEEDS	22,287	61	12,336	38
CLOVER SEED	12,561	43	12,567	43
FESCUE SEED	810,312	1,131	801,029	1,119
KENTUCKY BLUEGRASS	241,762	901	241,762	901
RYEGRASS	701,275	1,172	627,580	1,040
TIMOTHY GRASS	5,527	15	5,527	15
SUDANGRASS	761,507	1,267	568,087	936
ORCHARDGRASS	111,232	214	88,792	168
OTHERGRASS	1,389,508	1,654	630,715	720
LAWN SEED	923,467	1,970	811,475	1,696
SUB. TOTAL	12,310,468	14,547	7,854,840	10,668
VEGETABLE SEEDS	1,515,928	27,048	106,850	1,101
HERBACEOUS PLANTS	45,954	2,458	4,855	863
SEEDS OF OTHER FOREST TREE	56,043	269	12,462	43
SEED OF FRUIT TREE	74,646	95	41	6
OTHER	59,061	305	33,657	153
SUB. TOTAL	235,704	3,127	51,015	1,065
TOTAL	14,062,100	44,722	8,012,705	12,834

Source: Korea Customs Service

KOREA: MY2004/2005(July/June) Planting Seed Exports (Unit: KG,US\$1,000 based on FOB)				
COMMODITY	TO WORLD		TO THE U.S.	
	VOLUME	VALUE	VOLUME	VALUE
OTHER GRASS	274	9	0	0
HERBACEOUS PLANTS	73,767	779	1,935	31
VEGETABLE SEED	349,718	14,367	14,064	1,912
SEED OF FRUIT TREE	23,426	11	0	0
SEED OF OTHER FOREST TREE	37,534	254	189	19
OTHER	31,457	550	2	13
TOTAL	516,176	15,970	16,190	1,975

KOREA: MY2003/2004(July/June) Planting Seed Exports (Unit: KG,US\$1,000 based on FOB)				
COMMODITY	TO WORLD		TO THE U.S.	
	VOLUME	VALUE	VOLUME	VALUE
HERBACEOUS PLANTS	2,737	62	59	12
VEGETABLE SEED	303,095	14,546	16,438	1,694
SEED OF FRUIT TREE	80	15	70	14
SEED OF OTHER FOREST TREE	2,258	61	0	0
OTHER	52,619	656	0	0
TOTAL	360,789	15,340	16,567	1,720

Source: Korea Customs Service

Korea: Vegetable Seed Production (Kg, Calendar Year)						
Commodity	CY 2003			CY 2004		
	Total	Local Production	Overseas Production 1/	Total	Local Production	Overseas Production 1/
White Radish	683,356	215,764	467,592	699,969	257,314	442,655
Chinese Cabbage	131,545	102,784	28,761	117,252	94,812	22,440
Cabbage	64,780	6,062	58,718	31,337	4,675	26,662
Onion	45,514	11,527	33,987	28,879	3,208	25,671
Welsh Onion	102,416	3,683	98,733	98,399	3,234	95,165
Carrot	65,475	560	64,915	49,085	610	48,475
Lettuce	25,439	1,694	23,745	35,392	473	34,919
Spinach	121,324	650	120,674	220,770	1,220	219,550
Red Pepper	56,038	2,866	53,172	54,479	3,266	51,213
Tomato	2,424	11	2,413	1,099	20	1,079
Melon	2,050	650	1,400	2,231	1,263	968
Cucumber	9,504	864	8,640	6,308	695	5,613
Water Melon	24,970	1,765	23,205	16,500	1,051	15,450
Squash	24,672	1,368	23,304	19,521	1,238	18,283
Total	1,359,505	350,246	1,009,259	1,381,220	373,079	1,008,141

1/ Korea Seed Association includes overseas production in total vegetable seed production in Korea because local seed companies cultivated the seed abroad and then imported it into Korea.

Source: Korean Seed Association

Korea: Vegetable Seed Imports (Kg, Calendar Year)						
Commodity	CY 2003			CY 2004		
	Total Imports	Pure Imports	Overseas Production 1/	Total Imports	Pure Imports	Overseas Production 1/
White Radish	634,661	166,709	467,592	575,503	132,848	442,655
Chinese Cabbage	28,762	1	28,761	22,440	0	22,440
Cabbage	59,004	286	58,718	42,457	131	42,326
Onion	39,385	5,398	33,987	32,718	7,047	25,671
Welsh Onion	105,260	6,527	98,733	104,216	9,051	95,165
Carrot	71,346	6,431	64,915	56,765	8,290	48,475
Lettuce	24,387	642	23,745	35,553	634	34,919
Spinach	199,275	78,601	120,674	331,934	112,384	219,550
Red Pepper	53,226	54	53,172	52,296	121	52,175
Tomato	2,477	64	2,413	1,269	117	1,152
Melon	1,400	0	1,400	968	0	968
Cucumber	8,654	14	8,640	5,639	26	5,613
Water Melon	23,205	0	23,205	15,450	0	15,450
Squash	24,244	940	23,304	38,148	4,982	33,166
Total	1,274,926	265,667	1,009,259	1,315,356	275,631	1,039,725

1/ Imports that Korean seed companies cultivated abroad.

Source: Korean Seed Association

Korea – CY 2004 List of National Recommended Cultivars of Grass and Forage Crops (As of end April 2004)	
GRASSES	
Orchard grass	Potomac, Frode, Frontier, Ambassador, Hallmark, Summer Green, Amba, Warrior, 93E.
Tall Fescue	Fawn, Alta, Festorina, Felopa, AU-Triumph, Cajun, Montebello.
Timothy	Climax, Clair, Odenwalder, Hokuo, Kunpu, Liphlea.
Perennialryegrass	Norlea, Taptoe, Reveille, Bastion, Ellett, Bison, Tetrete, Friend.
Kentucky Bluegrass	Kenblue, Monopoly
Red Top	Streaker
Reed Canary Grass	Frontier, Venture, Vantage.
Meadow Fescue	Joma
Bromgrass	Regar
LEGUMES	
Alfalfa	Pacer, Scout, Team, Luna, Vernal, 5444, Drummor, Kitawakaba
White Clover	California Ladino, Regal.
Red Clover	Kenland, Titus, Atlas, TR2000.
Birdsfoottrefoil	Empire, Viking.
FORAGE CROPS	
Corn	P-3394, P-3156, P-3163, P-3223, P-3310, P-3130, P-36H36, P-32P75, P-33F18, P33J56, 32K26, 32R42, 32K61, 31G20, DK-689, DK-729, DK-713, DK501, DK720S, DK537, DK754S, DK697, DKC61-24, G-4743, G4655, NC+5514, NC+7177, NC+4880, NC+6440, GW6959, GW737, GW5018, Garst8342, Garst8396IT, Garst8285, Garst New 8640, N73-Q3, EXP874, PP3303.
Sorghum x Sudan grass Hybrid	P855F, P877F, Jumbo, T.E Haygrazer, Sordan 79, GW-9110G, GW-104G, GW9161F, SX-17, Speed Feed, G-7, Turbo9, Turbo10, TE-Evergreen, Betta Grazer, AG2501, Dairyman's Dream, PAC F 8350, Cow Pow.
Sorghum x Sorghum Hybrid	SS 405, KF 429, Mega Sweet.
Rye	Koolgrazer, Elbon, Vita-graze, Bonel, Athens-Abruzzi, Maton, Wrens abruzzo, Wintermore, Danko, Wintergrazer70, Luchs, Olkon, Bates, Humbolt, MAC Blue, BarrGrazer, BarrGrainMaster, GI85Ryegraser, GI87Ryegraser, Lovaszdatonai, Wintergreen, Jlee Select, 9909 Green Power, Spooner (1) .
Oats	Cayuse, Magum, Foothill, West (Speed Oat), Murray, Swan, Ensiler, Yilgarn, Palinup, Cashel, Irwin, Dane, Troy, A.C. Juniper, Hayabusa, Enterprise, Nugene, Sesqui (1) , Wabasha (1) , AGL 4101 (2) .
Forage Rape	Akela, Velox, Ramon, Sparta, Barnapoli, Ember.
Italian rye grass	Dalita, Tetrone, Barmultra, Tetraflorum, Gordo, Sikem, Bartissimo, Wilo, Combata, Tosca, Florida80, Tachiwase, Marshall, Grazer, TAM-90, Typhoon, Ribeye, Jivet (1) .

Note: (1) Entries in boldface have been new since October 2004.

(2) Entries in boldface have been new since March 2005.

Source: National Agricultural Cooperative Federation (NACF)