

**Seed Coating Market by Form, Additives (Polymers, Pellets, Colorants, Minerals/pumice), Process (Film coating, Encrusting, Pelleting), Crop (Cereals & grains, Oilseeds & pulses, Vegetables, Flowers & ornamentals) and Region - Global Forecast to 2027**

Market Report | 2022-08-08 | 196 pages | MarketsandMarkets

**AVAILABLE LICENSES:**

- Single User \$4950.00
- Multi User \$6650.00
- Corporate License \$8150.00
- Enterprise Site License \$10000.00

**Report description:**

The seed coating market is projected to reach USD 3.6 Billion by 2027 growing at a CAGR of 8.4% from 2022 to 2027. The increasing population has also led to increasing demand for food, resulting in the need to enhance agricultural productivity. Government support, and the presence of key manufacturers in this market, have contributed to the growth of the seed coating market.

"Seed coating has high demand in additives segment."

The seed coating market has been segmented based on additives into polymers, colorants, pellets, minerals/pumice, active ingredients, binders, and other additives. The polymer segment accounted for the largest market share in 2021, accounting for USD 651.3 million. It is among the fastest-growing additives segments, followed by colorants and active ingredients. Seed coatings are critical carriers of active ingredients, such as nutrients, protectants, and phytoactive promoters. Using seed coatings enhances the delivery of active ingredients in treated seeds. They not only minimize the on-farm activities by effectively binding components to the seed but also maintain environment-friendly standards.

"Asia Pacific is projected to witness the growth of 9.2% during the forecast period in the seed coating market."

The seed coating market in the Asia Pacific is growing at a CAGR of 9.2% due to increased demand for high-quality crops, a decrease in arable lands, and an increase in the population. Companies in the seed industries are working on creating new innovative products to boost the growth of seeds by aiding in every stage of seed growth. The Asia Pacific seed coating market is competitive, with many domestic and multinational players competing for market share. Emphasis is given to the companies' mergers, expansion, acquisition, partnership, and new product development as strategic approaches adopted by the leading

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

companies to boost their brand presence among consumers.

The break-up of Primaries:

By Company Type: Tier 1 - 45%, Tier 2- 35% , Tier 3 - 55%

By Designation: C level - 40%, Managers - 30%, Executives - 30%

By Region: North America - 35%, Europe - 20%, Asia Pacific - 30%, RoW -15%

Leading players profiled in this report:

- BASF SE (Germany)
- Solvay S.A. (Belgium)
- Clariant AG (Switzerland)
- Croda International plc (UK)
- DSM (Netherlands)
- Sensient Technologies (US)
- Brett Young Seeds Limited (Canada)
- Milliken Chemicals (US)
- Precision Laboratories (US)
- Germain Seed Technology Inc. (UK)

Research Coverage:

The report segments the seed coating market based on form, process, additive, active ingredient, crop type, and region. In terms of insights, this report has focused on various levels of analyses-the competitive landscape, end-use analysis, and company profiles, which together comprise and discuss views on the emerging & high-growth segments of the global seed coating market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

Reasons to buy this report:

- To get a comprehensive overview of the seed coating market
- To gain wide-ranging information about the top players in this industry, their product portfolios, and key strategies adopted by them
- To gain insights into the major countries/regions in which the seed coating market is flourishing

## Table of Contents:

1	INTRODUCTION	30
1.1	STUDY OBJECTIVES	30
1.2	MARKET DEFINITION	30
1.3	STUDY SCOPE	31
FIGURE 1	MARKET SEGMENTATION	31
TABLE 1	INCLUSIONS AND EXCLUSIONS	31
FIGURE 2	REGIONAL SEGMENTATION	32
1.4	PERIOD CONSIDERED	33
1.5	CURRENCY CONSIDERED	33
TABLE 2	USD EXCHANGE RATES CONSIDERED, 2019-2021	33
1.6	UNIT CONSIDERED	34
1.7	STAKEHOLDERS	34
2	RESEARCH METHODOLOGY	35
2.1	RESEARCH DATA	35
FIGURE 3	SEED COATING MARKET: RESEARCH DESIGN	35
2.1.1	SECONDARY DATA	36
2.1.1.1	Key data from secondary sources	36

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2.1.2	PRIMARY DATA	36
2.1.2.1	Primary interviews with experts	36
2.1.2.2	List of key primary interview participants	37
2.1.2.3	Breakdown of primary interviews	37
FIGURE 4	BREAKDOWN OF PRIMARY INTERVIEWS BY COMPANY TYPE, DESIGNATION, AND REGION	37
2.1.2.4	Primary sources	38
2.2	MARKET SIZE ESTIMATION	38
2.2.1	BOTTOM-UP APPROACH	39
FIGURE 5	MARKET ESTIMATION METHODOLOGY: BOTTOM-UP APPROACH	39
2.2.2	TOP-DOWN APPROACH	40
FIGURE 6	MARKET SIZE ESTIMATION METHODOLOGY: TOP-DOWN APPROACH	40
2.3	DATA TRIANGULATION	41
FIGURE 7	DATA TRIANGULATION	41
2.4	ASSUMPTIONS	42
2.5	RESEARCH LIMITATIONS & ASSOCIATED RISKS	43
?		
3	EXECUTIVE SUMMARY	44
TABLE 3	SEED COATING MARKET SNAPSHOT, 2022 VS. 2027	44
FIGURE 8	SEED COATING MARKET, BY FORM, 2022 VS. 2027 (USD MILLION)	45
FIGURE 9	SEED COATING MARKET, BY ADDITIVE, 2022 VS. 2027 (USD MILLION)	46
FIGURE 10	SEED COATING MARKET, BY CROP TYPE, 2022 VS. 2027 (USD MILLION)	46
FIGURE 11	SEED COATING MARKET SHARE, BY REGION, 2021	47
4	PREMIUM INSIGHTS	48
4.1	ATTRACTIVE OPPORTUNITIES IN SEED COATING MARKET	48
FIGURE 12	INCREASING NEED FOR QUALITY SEEDS TO SUPPORT GROWTH OF SEED COATING MARKET	48
4.2	SEED COATING MARKET: GROWTH RATE OF MAJOR REGIONAL SUBMARKETS	48
FIGURE 13	CHINA TO BE FASTEST-GROWING MARKET FOR SEED COATING DURING FORECAST PERIOD	48
4.3	ASIA PACIFIC: SEED COATING MARKET, BY CROP TYPE & COUNTRY	49
FIGURE 14	CEREALS & GRAINS SUBSEGMENT AND CHINA TO ACCOUNT FOR LARGEST SHARES IN ASIA PACIFIC MARKET IN 2022	49
4.4	SEED COATING MARKET, BY FORM	49
FIGURE 15	LIQUID SUBSEGMENT TO DOMINATE SEED COATING MARKET DURING FORECAST PERIOD	49
4.5	SEED COATING MARKET, BY ADDITIVE	50
FIGURE 16	POLYMERS SUBSEGMENT TO DOMINATE SEED COATING MARKET DURING FORECAST PERIOD	50
4.6	SEED COATING MARKET, BY PROCESS	50
FIGURE 17	FILM COATING SUBSEGMENT TO DOMINATE SEED COATING MARKET DURING FORECAST PERIOD	50
4.7	SEED COATING MARKET, BY CROP TYPE	51
FIGURE 18	CEREALS & GRAINS SUBSEGMENT TO DOMINATE SEED COATING MARKET DURING FORECAST PERIOD	51
4.8	SEED COATING MARKET, BY REGION	51
FIGURE 19	NORTH AMERICA TO DOMINATE SEED COATING MARKET DURING FORECAST PERIOD	51
5	MARKET OVERVIEW	52
5.1	INTRODUCTION	52
FIGURE 20	EUROPE: TOP SIX SEED-PRODUCING COUNTRIES, 2018-2021 ('000 HECTARES)	53
5.2	MARKET DYNAMICS	54
FIGURE 21	DRIVERS, RESTRAINTS, OPPORTUNITIES, AND CHALLENGES: SEED COATING MARKET	54
5.2.1	DRIVERS	54

5.2.1.1	Enhancements and benefits derived from seed technologies to encourage adoption of seed coating	54
TABLE 4 IMPACT OF KEY DRIVERS ON SEED COATING MARKET		
5.2.1.2	Seed coating would support agricultural productivity on marginal lands	55
FIGURE 22 ANNUAL AVAILABILITY OF ARABLE LAND, 1950-2020 (HECTARES/PERSON)		
5.2.1.3	Increase in seed replacement rate to drive adoption of commercialized seeds	56
5.2.2 RESTRAINTS		
5.2.2.1	Uncertainty in climate conditions to impact seed coating market	57
TABLE 5 WEATHER CONDITIONS VS. DISEASES AFFECTING GROUNDNUTS IN SPECIFIC COUNTRIES		
5.2.2.2	Low yield of crops in under-irrigated areas to impact seed coating market	57
5.2.3 OPPORTUNITIES		
5.2.3.1	Development of biodegradable seed coatings to reduce environmental pollution	58
5.2.4 CHALLENGES		
5.2.4.1	Unorganized new entrants with low profit-to-cost ratio	58
6 INDUSTRY TRENDS		
6.1 INTRODUCTION		
6.2 VALUE CHAIN		
FIGURE 23 R&D AND MANUFACTURING PROCESSES TO CONTRIBUTE MAJOR VALUE TO OVERALL SEED COATING MARKET		
6.3 PORTER'S FIVE FORCES ANALYSIS		
TABLE 6 IMPACT OF PORTER'S FIVE FORCES ON SEED COATING MARKET		
FIGURE 24 SEED COATING MARKET: PORTER'S FIVE FORCES ANALYSIS		
6.3.1	THREAT OF NEW ENTRANTS	62
6.3.2	THREAT OF SUBSTITUTES	62
6.3.3	BARGAINING POWER OF SUPPLIERS	62
6.3.4	BARGAINING POWER OF BUYERS	62
6.3.5	INTENSITY OF COMPETITIVE RIVALRY	62
6.4 PATENT ANALYSIS		
TABLE 7 MAJOR PATENTS RELATED TO SEED COATING, 2019-2021		
7 SEED COATING MARKET, BY FORM		
7.1 INTRODUCTION		
FIGURE 25 SEED COATING MARKET, BY FORM, 2022 VS. 2027 (USD MILLION)		
TABLE 8 SEED COATING MARKET, BY FORM, 2019-2021 (USD MILLION)		
TABLE 9 SEED COATING MARKET, BY FORM, 2022-2027 (USD MILLION)		
7.2 POWDER		
7.2.1 SOLID PARTICULATE BINDERS APPLIED AS FINE POWDERS BECOME HYDROLYZED AS WATER DURING COATING PROCESS		
7.3 LIQUID		
7.3.1 DOSAGE OF LIQUID SEED COATING FORMULATIONS TYPICALLY TO RANGE FROM <0.05 TO 1.0% BY WEIGHT		
8 SEED COATING MARKET, BY CROP TYPE		
8.1 INTRODUCTION		
FIGURE 26 SEED COATING MARKET, BY CROP TYPE, 2022 VS. 2027 (USD MILLION)		
TABLE 10 SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION)		
TABLE 11 SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION)		
8.2 CEREALS & GRAINS		
8.2.1 HIGH CONSUMPTION OF CEREALS IN FOOD AND FEED TO ENCOURAGE GROWERS TO ADOPT SEED COATING TECHNIQUE		
TABLE 12 CEREALS & GRAINS: SEED COATING MARKET, BY REGION, 2019-2021 (USD MILLION)		
TABLE 13 CEREALS & GRAINS: SEED COATING MARKET, BY REGION,		

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2022-2027 (USD MILLION)71

8.3OILSEEDS & PULSES72

8.3.1HIGH PROTEIN CONTENT TO BE MAJOR DRIVER OF DEMAND FOR OILSEEDS & PULSES72

TABLE 14OILSEEDS & PULSES: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION)72

TABLE 15OILSEEDS & PULSES: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION)72

8.4VEGETABLES73

8.4.1PROTECTED CULTIVATION OF HIGH-VALUE CROPS TO DRIVE USE OF INNOVATIVE TECHNIQUES73

TABLE 16VEGETABLES: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION)73

TABLE 17VEGETABLES: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION)73

8.5FLOWERS & ORNAMENTALS74

8.5.1HIGH EXPORT POTENTIAL TO URGE GROWERS TO MAINTAIN STANDARD QUALITY74

TABLE 18FLOWERS & ORNAMENTALS: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION)74

TABLE 19FLOWERS & ORNAMENTALS: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION)74

8.6OTHER CROP TYPES75

TABLE 20OTHER CROP TYPES: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION)75

TABLE 21OTHER CROP TYPES: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION)75

9SEED COATING MARKET, BY PROCESS76

9.1INTRODUCTION77

FIGURE 27SEED COATING MARKET, BY PROCESS, 2022 VS. 2027 (USD MILLION)77

TABLE 22SEED COATING MARKET, BY PROCESS, 2019-2021 (USD MILLION)78

TABLE 23SEED COATING MARKET, BY PROCESS, 2022-2027 (USD MILLION)78

?

9.2FILM COATING78

9.2.1FILM COATING IS AVAILABLE IN SEVERAL DIFFERENT COLORS TO AID IN SEED IDENTITY AND SAFETY AWARENESS78

9.3ENCrustING79

9.3.1ENCrustING ENABLES SINGULATION MAXIMIZING PLANT EFFICIENCY79

9.4PELLETING79

9.4.1PELLETING RESULTS IN UNIFORMITY OF PLANT GROWTH79

10SEED COATING MARKET, BY ADDITIVE80

10.1INTRODUCTION81

FIGURE 28SEED COATING MARKET, BY ADDITIVE, 2022 VS. 2027 (USD MILLION)81

TABLE 24SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION)82

TABLE 25SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION)82

10.2POLYMERS82

10.2.1POLYMERS ARE WIDELY USED IN SEED COATING AS THEY OFFER MULTIPLE BENEFITS82

TABLE 26SEED COATING MARKET, BY POLYMER TYPE, 2019-2021 (USD MILLION)83

TABLE 27SEED COATING MARKET, BY POLYMER TYPE, 2022-2027 (USD MILLION)83

TABLE 28POLYMERS: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION)83

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

TABLE 29 POLYMERS: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION) 83

10.2.2 POLYMER GELS 84

TABLE 30 POLYMER GELS: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION) 84

TABLE 31 POLYMER GELS: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION) 84

10.2.3 SUPERABSORBENT POLYMER GELS 84

TABLE 32 SUPERABSORBENT POLYMER GELS: SEED COATING MARKET, BY REGION, 2019-2021 (USD MILLION) 85

TABLE 33 SUPERABSORBENT POLYMER GELS: SEED COATING MARKET, BY REGION, 2022-2027 (USD MILLION) 85

10.3 COLORANTS 85

10.3.1 COLORANTS TO ENHANCE APPEARANCE OF SEEDS 85

TABLE 34 COLORANTS: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION) 86

TABLE 35 COLORANTS: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION) 86

10.4 PELLETS 86

10.4.1 PELLETING TO INCREASE WEIGHT OF SEED, IMPROVING PLANTABILITY 86

TABLE 36 PELLETS: SEED COATING MARKET, BY REGION, 2019-2021 (USD MILLION) 87

TABLE 37 PELLETS: SEED COATING MARKET, BY REGION, 2022-2027 (USD MILLION) 87

10.5 BINDERS 87

10.5.1 SURVIVAL OF PLANT GROWTH PROMOTING RHIZOBACTERIA  
TO GROW DEMAND FOR BINDERS 87

10.5.2 POLYVINYL ALCOHOL 87

10.5.3 BENTONITE 88

10.5.4 OTHER BINDERS 88

TABLE 38 BINDERS: SEED COATING MARKET, BY REGION, 2019-2021 (USD MILLION) 88

TABLE 39 BINDERS: SEED COATING MARKET, BY REGION, 2022-2027 (USD MILLION) 88

10.6 MINERALS/PUMICE 89

10.6.1 POROSITY OF PUMICE TO HELP IN GERMINATION OF SEEDS 89

TABLE 40 MINERALS/PUMICE: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION) 89

TABLE 41 MINERALS/PUMICE: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION) 89

10.7 ACTIVE INGREDIENTS 90

10.7.1 INVOLVEMENT OF ACTIVE INGREDIENTS TO ENHANCE SEEDLING HEALTH, COMBAT PEST INFESTATION, AND IMPROVE PLANT  
ESTABLISHMENT 90

TABLE 42 ACTIVE INGREDIENTS: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION) 90

TABLE 43 ACTIVE INGREDIENTS: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION) 90

10.8 OTHER ADDITIVES 91

TABLE 44 OTHER ADDITIVES: SEED COATING MARKET, BY REGION,  
2019-2021 (USD MILLION) 91

TABLE 45 OTHER ADDITIVES: SEED COATING MARKET, BY REGION,  
2022-2027 (USD MILLION) 91

11 SEED COATING MARKET, BY ACTIVE INGREDIENT 92

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

## 11.1 INTRODUCTION 93

TABLE 46 SEED COATING MARKET, BY ACTIVE INGREDIENT,  
2019-2021 (USD MILLION) 93

TABLE 47 SEED COATING MARKET, BY ACTIVE INGREDIENT,  
2022-2027 (USD MILLION) 94

## 11.2 PROTECTANTS 94

11.2.1 DEMAND FOR DISEASE-RESISTANT CROPS TO PAVE WAY FOR PROTECTANTS 94

## 11.3 PHYTOACTIVE PROMOTERS 95

11.3.1 INNOVATION IN USE OF PHYTOACTIVE PROMOTERS VIA SEED COATS TO MAKE FARMING POSSIBLE IN DEGRADED AREAS 95

## 11.4 OTHER ACTIVE INGREDIENTS 95

## 12 SEED COATING MARKET, BY REGION 96

### 12.1 INTRODUCTION 97

FIGURE 29 US, CANADA, AND CHINA TO ACCOUNT FOR LARGER SHARES  
IN SEED COATING MARKET DURING FORECAST PERIOD 97

TABLE 48 SEED COATING MARKET, BY REGION, 2019-2021 (USD MILLION) 98

TABLE 49 SEED COATING MARKET, BY REGION, 2022-2027 (USD MILLION) 98

### 12.2 NORTH AMERICA 98

FIGURE 30 NORTH AMERICA: REGIONAL SNAPSHOT 99

TABLE 50 NORTH AMERICA: SEED COATING MARKET, BY COUNTRY,  
2019-2021 (USD MILLION) 99

TABLE 51 NORTH AMERICA: SEED COATING MARKET, BY COUNTRY,  
2022-2027 (USD MILLION) 100

TABLE 52 NORTH AMERICA: SEED COATING MARKET, BY ADDITIVE,  
2019-2021 (USD MILLION) 100

TABLE 53 NORTH AMERICA: SEED COATING MARKET, BY ADDITIVE,  
2022-2027 (USD MILLION) 100

TABLE 54 NORTH AMERICA: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 101

TABLE 55 NORTH AMERICA: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION) 101

TABLE 56 NORTH AMERICA: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 102

TABLE 57 NORTH AMERICA: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 102

#### 12.2.1 US 102

12.2.1.1 Seeds can be coated for precision placement of insecticide near young growing roots of just-emerged plants 102

TABLE 58 US: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION) 103

TABLE 59 US: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION) 103

TABLE 60 US: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 103

TABLE 61 US: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 104

TABLE 62 US: SEED COATING MARKET, BY POLYMER TYPE, 2019-2021 (USD MILLION) 104

TABLE 63 US: SEED COATING MARKET, BY POLYMER TYPE, 2022-2027 (USD MILLION) 104

#### 12.2.2 CANADA 105

12.2.2.1 Delayed harvest can be enabled using seed coating technique due to cold temperature 105

TABLE 64 CANADA: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 105

TABLE 65 CANADA: SEED COATING MARKET, BY CROP TYPE,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2022-2027 (USD MILLION) 105

TABLE 66 CANADA: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 106

TABLE 67 CANADA: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 106

TABLE 68 CANADA: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 107

TABLE 69 CANADA: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 107

12.2.3 MEXICO 107

12.2.3.1 Mexico has greater relevance in organic sector due to increased demand for organic products in developed markets 107

TABLE 70 MEXICO: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 108

TABLE 71 MEXICO: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION) 108

TABLE 72 MEXICO: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 109

TABLE 73 MEXICO: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 109

TABLE 74 MEXICO: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 109

TABLE 75 MEXICO: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 110

12.3 EUROPE 110

TABLE 76 EUROPE: SEED COATING MARKET, BY COUNTRY, 2019-2021 (USD MILLION) 111

TABLE 77 EUROPE: SEED COATING MARKET, BY COUNTRY, 2022-2027 (USD MILLION) 111

TABLE 78 EUROPE: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 112

TABLE 79 EUROPE: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 112

TABLE 80 EUROPE: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 112

TABLE 81 EUROPE: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION) 113

TABLE 82 EUROPE: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 113

TABLE 83 EUROPE: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 113

12.3.1 SPAIN 113

12.3.1.1 Increase in cultivation of GM crops to drive growth of seed coating market 113

TABLE 84 SPAIN: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION) 114

TABLE 85 SPAIN: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION) 114

TABLE 86 SPAIN: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 115

TABLE 87 SPAIN: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 115

TABLE 88 SPAIN: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 115

TABLE 89 SPAIN: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 116

12.3.2 ITALY 116

12.3.2.1 Vegetables, corns, and wheat are key crops identified in seed coating market 116

TABLE 90 ITALY: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION) 116

TABLE 91 ITALY: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION) 117

TABLE 92 ITALY: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 117

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



TABLE 93 ITALY: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 117

TABLE 94 ITALY: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 118

TABLE 95 ITALY: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 118

12.3.3 GERMANY 118

12.3.3.1 Regulations in Europe to lead to increased usage of new seed enhancement techniques in Germany 118

TABLE 96 GERMANY: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 118

TABLE 97 GERMANY: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION) 119

TABLE 98 GERMANY: SEED COATING MARKET, BY ADDITIVE,  
2019-2021 (USD MILLION) 119

TABLE 99 GERMANY: SEED COATING MARKET, BY ADDITIVE,  
2022-2027 (USD MILLION) 119

TABLE 100 GERMANY: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 120

TABLE 101 GERMANY: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 120

12.3.4 FRANCE 120

12.3.4.1 Increase in bio-farming to lead to surge in demand for biodegradable seed enhancement methods 120

TABLE 102 FRANCE: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 121

TABLE 103 FRANCE: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION) 121

TABLE 104 FRANCE: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 121

TABLE 105 FRANCE: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 122

TABLE 106 FRANCE: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 122

TABLE 107 FRANCE: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 122

12.3.5 NETHERLANDS 123

12.3.5.1 By adopting new technologies, Netherlands to witness enhanced production efficiency for crop yields 123

TABLE 108 NETHERLANDS: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 123

TABLE 109 NETHERLANDS: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION) 123

TABLE 110 NETHERLANDS: SEED COATING MARKET, BY ADDITIVE,  
2019-2021 (USD MILLION) 124

TABLE 111 NETHERLANDS: SEED COATING MARKET, BY ADDITIVE,  
2022-2027 (USD MILLION) 124

TABLE 112 NETHERLANDS: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 124

TABLE 113 NETHERLANDS: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 125

12.3.6 REST OF EUROPE 125

TABLE 114 REST OF EUROPE: SEED COATING MARKET, BY CROP TYPE,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2019-2021 (USD MILLION) 125

TABLE 115 REST OF EUROPE: SEED COATING MARKET, BY CROP TYPE,

2022-2027 (USD MILLION) 125

TABLE 116 REST OF EUROPE: SEED COATING MARKET, BY ADDITIVE,

2019-2021 (USD MILLION) 126

TABLE 117 REST OF EUROPE: SEED COATING MARKET, BY ADDITIVE,

2022-2027 (USD MILLION) 126

TABLE 118 REST OF EUROPE: SEED COATING MARKET, BY POLYMER TYPE,

2019-2021 (USD MILLION) 126

TABLE 119 REST OF EUROPE: SEED COATING MARKET, BY POLYMER TYPE,

2022-2027 (USD MILLION) 127

#### 12.4 ASIA PACIFIC 127

TABLE 120 ASIA PACIFIC: SEED COATING MARKET, BY COUNTRY,

2019-2021 (USD MILLION) 127

TABLE 121 ASIA PACIFIC: SEED COATING MARKET, BY COUNTRY,

2022-2027 (USD MILLION) 128

TABLE 122 ASIA PACIFIC: SEED COATING MARKET, BY ADDITIVE,

2019-2021 (USD MILLION) 128

TABLE 123 ASIA PACIFIC: SEED COATING MARKET, BY ADDITIVE,

2022-2027 (USD MILLION) 128

TABLE 124 ASIA PACIFIC: SEED COATING MARKET, BY CROP TYPE,

2019-2021 (USD MILLION) 129

TABLE 125 ASIA PACIFIC: SEED COATING MARKET, BY CROP TYPE,

2022-2027 (USD MILLION) 129

TABLE 126 ASIA PACIFIC: SEED COATING MARKET, BY POLYMER TYPE,

2019-2021 (USD MILLION) 129

TABLE 127 ASIA PACIFIC: SEED COATING MARKET, BY POLYMER TYPE,

2022-2027 (USD MILLION) 129

##### 12.4.1 CHINA 130

12.4.1.1 Unstable economic conditions and declining ecological conditions to drive seed coating market 130

TABLE 128 CHINA: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION) 130

TABLE 129 CHINA: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION) 130

TABLE 130 CHINA: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 131

TABLE 131 CHINA: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 131

TABLE 132 CHINA: SEED COATING MARKET, BY POLYMER TYPE,

2019-2021 (USD MILLION) 131

TABLE 133 CHINA: SEED COATING MARKET, BY POLYMER TYPE,

2022-2027 (USD MILLION) 132

##### 12.4.2 AUSTRALIA 132

12.4.2.1 Policy reforms emphasize increased production and high-quality seeds and seedlings 132

TABLE 134 AUSTRALIA: SEED COATING MARKET, BY CROP TYPE,

2019-2021 (USD MILLION) 132

TABLE 135 AUSTRALIA: SEED COATING MARKET, BY CROP TYPE,

2022-2027 (USD MILLION) 133

TABLE 136 AUSTRALIA: SEED COATING MARKET, BY ADDITIVE,

2019-2021 (USD MILLION) 133

TABLE 137 AUSTRALIA: SEED COATING MARKET, BY ADDITIVE,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2022-2027 (USD MILLION)133

TABLE 138 AUSTRALIA: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION)134

TABLE 139 AUSTRALIA: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION)134

12.4.3 INDIA134

12.4.3.1 Developing countries to provide growth opportunities due to high economic growth and favorable seed policies134

TABLE 140 INDIA: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION)134

TABLE 141 INDIA: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION)135

TABLE 142 INDIA: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION)135

TABLE 143 INDIA: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION)135

TABLE 144 INDIA: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION)136

TABLE 145 INDIA: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION)136

12.4.4 JAPAN136

12.4.4.1 Increase in agricultural outputs through limited resources to encourage market growth136

TABLE 146 JAPAN: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION)137

TABLE 147 JAPAN: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION)137

TABLE 148 JAPAN: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION)137

TABLE 149 JAPAN: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION)138

TABLE 150 JAPAN: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION)138

TABLE 151 JAPAN: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION)138

12.4.5 THAILAND138

12.4.5.1 Increasing demand for cereal crops and export of vegetable seeds to drive market for seed coating138

TABLE 152 THAILAND: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION)139

TABLE 153 THAILAND: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION)139

TABLE 154 THAILAND: SEED COATING MARKET, BY ADDITIVE,  
2019-2021 (USD MILLION)139

TABLE 155 THAILAND: SEED COATING MARKET, BY ADDITIVE,  
2022-2027 (USD MILLION)140

TABLE 156 THAILAND: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION)140

TABLE 157 THAILAND: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION)140

12.4.6 REST OF ASIA PACIFIC140

TABLE 158 REST OF ASIA PACIFIC: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION)141

TABLE 159 REST OF ASIA PACIFIC: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION)141

TABLE 160 REST OF ASIA PACIFIC: SEED COATING MARKET, BY ADDITIVE,  
2019-2021 (USD MILLION)141

TABLE 161 REST OF ASIA PACIFIC: SEED COATING MARKET, BY ADDITIVE,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2022-2027 (USD MILLION) 142

TABLE 162 REST OF ASIA PACIFIC: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 142

TABLE 163 REST OF ASIA PACIFIC: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 142

?

12.5 REST OF THE WORLD 143

TABLE 164 ROW: SEED COATING MARKET, BY COUNTRY, 2019-2021 (USD MILLION) 143

TABLE 165 ROW: SEED COATING MARKET, BY COUNTRY, 2022-2027 (USD MILLION) 143

TABLE 166 ROW: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION) 144

TABLE 167 ROW: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION) 144

TABLE 168 ROW: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 144

TABLE 169 ROW: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 145

TABLE 170 ROW: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 145

TABLE 171 ROW: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 145

12.5.1 BRAZIL 146

12.5.1.1 Emphasis on R&D, supportive policies, and integrated approach toward cultivation to enhance quality of agricultural yield 146

TABLE 172 BRAZIL: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION) 146

TABLE 173 BRAZIL: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION) 147

TABLE 174 BRAZIL: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION) 147

TABLE 175 BRAZIL: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION) 147

TABLE 176 BRAZIL: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 148

TABLE 177 BRAZIL: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 148

12.5.2 ARGENTINA 148

12.5.2.1 Increasing demand for high-quality seeds due to different soil-climate combination to drive market 148

TABLE 178 ARGENTINA: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 149

TABLE 179 ARGENTINA: SEED COATING MARKET, BY CROP TYPE,  
2022-2027 (USD MILLION) 149

TABLE 180 ARGENTINA: SEED COATING MARKET, BY ADDITIVE,  
2019-2021 (USD MILLION) 149

TABLE 181 ARGENTINA: SEED COATING MARKET, BY ADDITIVE,  
2022-2027 (USD MILLION) 150

TABLE 182 ARGENTINA: SEED COATING MARKET, BY POLYMER TYPE,  
2019-2021 (USD MILLION) 150

TABLE 183 ARGENTINA: SEED COATING MARKET, BY POLYMER TYPE,  
2022-2027 (USD MILLION) 150

12.5.3 SOUTH AFRICA 150

12.5.3.1 Adoption of innovative and precise techniques to obtain effective crop yield 150

TABLE 184 SOUTH AFRICA: SEED COATING MARKET, BY CROP TYPE,  
2019-2021 (USD MILLION) 151

TABLE 185 SOUTH AFRICA: SEED COATING MARKET, BY CROP TYPE,

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2022-2027 (USD MILLION)	151
TABLE 186 SOUTH AFRICA: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION)	151
TABLE 187 SOUTH AFRICA: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION)	152
TABLE 188 SOUTH AFRICA: SEED COATING MARKET, BY POLYMER TYPE, 2019-2021 (USD MILLION)	152
TABLE 189 SOUTH AFRICA: SEED COATING MARKET, BY POLYMER TYPE, 2022-2027 (USD MILLION)	152
12.5.4 OTHERS IN ROW	152
TABLE 190 OTHERS IN ROW: SEED COATING MARKET, BY CROP TYPE, 2019-2021 (USD MILLION)	153
TABLE 191 OTHERS IN ROW: SEED COATING MARKET, BY CROP TYPE, 2022-2027 (USD MILLION)	153
TABLE 192 OTHERS IN ROW: SEED COATING MARKET, BY ADDITIVE, 2019-2021 (USD MILLION)	153
TABLE 193 OTHERS IN ROW: SEED COATING MARKET, BY ADDITIVE, 2022-2027 (USD MILLION)	154
TABLE 194 OTHERS IN ROW: SEED COATING MARKET, BY POLYMER TYPE, 2019-2021 (USD MILLION)	154
TABLE 195 OTHERS IN ROW: SEED COATING MARKET, BY POLYMER TYPE, 2022-2027 (USD MILLION)	154
13 COMPETITIVE LANDSCAPE	155
13.1 OVERVIEW	155
13.2 RANKING OF KEY PLAYERS, 2021	156
FIGURE 31 BASF SE TO DOMINATE SEED COATING MARKET IN 2021	156
13.3 COMPANY EVALUATION QUADRANT (KEY PLAYERS)	156
13.3.1 STARS	156
13.3.2 EMERGING LEADERS	156
13.3.3 PERVASIVE PLAYERS	157
13.3.4 PARTICIPANTS	157
FIGURE 32 COMPANY EVALUATION QUADRANT	157
13.4 COMPETITIVE BENCHMARKING	158
TABLE 196 SEED COATING MARKET: DETAILED LIST OF KEY PLAYERS	158
13.5 COMPETITIVE SCENARIO	158
13.5.1 EXPANSIONS & INVESTMENTS	158
TABLE 197 EXPANSIONS & INVESTMENTS, 2019-2021	158
13.5.2 ACQUISITIONS	159
TABLE 198 ACQUISITIONS, 2022	159
13.5.3 AGREEMENTS & JOINT VENTURES	159
TABLE 199 AGREEMENTS & JOINT VENTURES, 2022	159
?	
14 COMPANY PROFILES	160
(Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats))*	
14.1 KEY PLAYERS	160
14.1.1 BASF SE	160

TABLE 200	BASF SE: BUSINESS OVERVIEW	160
FIGURE 33	BASF SE: COMPANY SNAPSHOT	161
TABLE 201	BASF SE: PRODUCTS OFFERED	161
TABLE 202	BASF SE: OTHERS	162
14.1.2	SOLVAY S.A.	163
TABLE 203	SOLVAY S.A.: BUSINESS OVERVIEW	163
FIGURE 34	SOLVAY S.A.: COMPANY SNAPSHOT	164
TABLE 204	SOLVAY S.A.: PRODUCTS OFFERED	164
TABLE 205	SOLVAY S.A.: DEALS	165
14.1.3	CRODA INTERNATIONAL PLC	166
TABLE 206	CRODA INTERNATIONAL PLC: BUSINESS OVERVIEW	166
FIGURE 35	CRODA INTERNATIONAL PLC: COMPANY SNAPSHOT	167
TABLE 207	CRODA INTERNATIONAL PLC: PRODUCTS OFFERED	167
TABLE 208	CRODA INTERNATIONAL PLC: OTHERS	168
14.1.4	CLARIANT AG	169
TABLE 209	CLARIANT AG: BUSINESS OVERVIEW	169
FIGURE 36	CLARIANT AG: COMPANY SNAPSHOT	170
TABLE 210	CLARIANT AG: PRODUCTS OFFERED	170
14.1.5	DSM	172
TABLE 211	DSM: BUSINESS OVERVIEW	172
FIGURE 37	DSM: COMPANY SNAPSHOT	173
TABLE 212	DSM: PRODUCTS OFFERED	173
14.1.6	SENSIENT TECHNOLOGIES	175
TABLE 213	SENSIENT TECHNOLOGIES: BUSINESS OVERVIEW	175
FIGURE 38	SENSIENT TECHNOLOGIES: COMPANY SNAPSHOT	176
TABLE 214	SENSIENT TECHNOLOGIES: PRODUCTS OFFERED	176
14.1.7	BRETTYOUNG SEEDS LIMITED	178
TABLE 215	BRETTYOUNG SEEDS LIMITED: BUSINESS OVERVIEW	178
TABLE 216	BRETTYOUNG SEEDS LIMITED: PRODUCTS OFFERED	178
14.1.8	MILLIKEN CHEMICAL	180
TABLE 217	MILLIKEN CHEMICAL: BUSINESS OVERVIEW	180
TABLE 218	MILLIKEN CHEMICAL: PRODUCTS OFFERED	180
14.1.9	PRECISION LABORATORIES, LLC	181
TABLE 219	PRECISION LABORATORIES, LLC: BUSINESS OVERVIEW	181
TABLE 220	PRECISION LABORATORIES, LLC: PRODUCTS OFFERED	181
14.1.10	GERMAINS SEED TECHNOLOGY INC	182
TABLE 221	GERMAINS SEED TECHNOLOGY INC: BUSINESS OVERVIEW	182
TABLE 222	GERMAINS SEED TECHNOLOGY INC: PRODUCTS OFFERED	182
14.1.11	CR MINERALS COMPANY, LLC	183
TABLE 223	CR MINERALS COMPANY, LLC: BUSINESS OVERVIEW	183
TABLE 224	CR MINERALS COMPANY, LLC: PRODUCTS OFFERED	183
14.1.12	GLOBACHEM	185
TABLE 225	GLOBACHEM: BUSINESS OVERVIEW	185
TABLE 226	GLOBACHEM: PRODUCTS OFFERED	185
14.1.13	UNIVERSAL COATING SYSTEMS	186
TABLE 227	UNIVERSAL COATING SYSTEMS: BUSINESS OVERVIEW	186
TABLE 228	UNIVERSAL COATING SYSTEMS: PRODUCTS OFFERED	186

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

14.1.14	CENTOR OCEANIA	187
TABLE 229	CENTOR OCEANIA: BUSINESS OVERVIEW	187
TABLE 230	CENTOR OCEANIA: PRODUCTS OFFERED	187
14.1.15	CHROMATECH INCORPORATED	188
TABLE 231	CHROMATECH INCORPORATED: BUSINESS OVERVIEW	188
TABLE 232	CHROMATECH INCORPORATED: PRODUCTS OFFERED	188
14.1.16	MICHELMAN, INC.	189
TABLE 233	MICHELMAN, INC.: BUSINESS OVERVIEW	189
TABLE 234	MICHELMAN, INC.: PRODUCTS OFFERED	189
14.1.17	SMITH SEED SERVICES	190
TABLE 235	SMITH SEED SERVICES: BUSINESS OVERVIEW	190
TABLE 236	SMITH SEED SERVICES: PRODUCTS OFFERED	190
14.1.18	PREBBLE SEEDS LTD	191
TABLE 237	PREBBLE SEEDS LTD: BUSINESS OVERVIEW	191
TABLE 238	PREBBLE SEEDS LTD: PRODUCTS OFFERED	191
14.1.19	ORGANIC DYES AND PIGMENTS	192
TABLE 239	ORGANIC DYES AND PIGMENTS: BUSINESS OVERVIEW	192
TABLE 240	ORGANIC DYES AND PIGMENTS: PRODUCTS OFFERED	192
14.1.20	CISTRONICS TECHNOVATIONS PVT LTD	193
TABLE 241	CISTRONICS TECHNOVATIONS PVT LTD: BUSINESS OVERVIEW	193
TABLE 242	CISTRONICS TECHNOVATIONS PVT LTD: PRODUCTS OFFERED	193

\*Details on Business Overview, Products Offered, Recent Developments, and MnM View (Key strengths/Right to Win, Strategic Choices Made, and Weaknesses and Competitive Threats) might not be captured in case of unlisted companies.

?		
15	ADJACENT AND RELATED MARKETS	194
15.1	INTRODUCTION	194
TABLE 243	ADJACENT MARKETS TO SEED COATING MARKET	194
15.2	LIMITATIONS	194
15.3	SEED TREATMENT MARKET	195
15.3.1	MARKET DEFINITION	195
15.3.2	MARKET OVERVIEW	195
TABLE 244	SEED TREATMENT MARKET SIZE, BY CROP TYPE, 2019-2021 (USD MILLION)	195
TABLE 245	SEED TREATMENT MARKET SIZE, BY CROP TYPE, 2022-2027 (USD MILLION)	196
TABLE 246	SEED TREATMENT MARKET SIZE, BY CROP TYPE, 2019-2021 (KT)	196
TABLE 247	SEED TREATMENT MARKET SIZE, BY CROP TYPE, 2022-2027 (KT)	196
15.4	SEEDS MARKET	197
15.4.1	MARKET DEFINITION	197
TABLE 248	SEEDS MARKET SIZE, BY CROP TYPE, 2016-2020 (USD MILLION)	197
TABLE 249	SEEDS MARKET SIZE, BY CROP TYPE, 2021-2026 (USD MILLION)	197
16	APPENDIX	198
16.1	DISCUSSION GUIDE	198
16.2	KNOWLEDGESTORE: MARKETSandMARKETS' SUBSCRIPTION PORTAL	201
16.3	CUSTOMIZATION OPTIONS	203
16.4	RELATED REPORTS	203
16.5	AUTHOR DETAILS	204

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

**Seed Coating Market by Form, Additives (Polymers, Pellets, Colorants, Minerals/pumice), Process (Film coating, Encrusting, Pelleting), Crop (Cereals & grains, Oilseeds & pulses, Vegetables, Flowers & ornamentals) and Region - Global Forecast to 2027**

Market Report | 2022-08-08 | 196 pages | MarketsandMarkets

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

**ORDER FORM:**

Select license	License	Price
	Single User	\$4950.00
	Multi User	\$6650.00
	Corporate License	\$8150.00
	Enterprise Site License	\$10000.00
		VAT
		Total

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Zip Code\*

Country\*

Date

Signature