Europe Seed Treatment Market - Growth, Trends, and Forecasts (2023 - 2028)

Market Report | 2023-01-23 | 120 pages | Mordor Intelligence

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Report description:

The European Seed Treatment Market is projected to register a CAGR of 5.7% during the forecast period.

Key Highlights
The growing population and the need to meet food requirement is increasing productivity inevitable, which is driving the seed treatment market in the region. With the rising awareness regarding innovative agricultural methods, farmers are shifting from traditional to modern farming methods. They are increasingly consuming and investing in commercial seeds to leverage the benefits associated with them. By origin, the non-chemical or bio-based seed treatment is growing at the fastest rate during the forecast period due to the shift in preference for organic products. According to the FiBL 2022 report, in Europe, 17.1 million hectares were managed organically in 2020 (EU: 14.9 million hectares). With almost 2.5 million hectares, France became the new number one in terms of farmland under organic management, followed by Spain (2.4 million hectares), Italy (2.1 million hectares), and Germany (1.7 million hectares). The demand for treated seeds is high in Germany, as cereal crops, like maize, barley, and fruits and vegetables, like grapes and sugar beet, are cultivated on a large scale in the country. Ban of GMO seeds, demand for higher yield, and the government's discouragement of chemical products in the region encourage the use of biological seed treatment products.
Moreover, a few schemes like the European Seed Treatment Assurance Scheme (ESTA), a quality assurance system to ensure that seed treatment and the resulting treated seed meet requirements defined by legislators and industry, are boosting the market's growth. The ESTA has been designed to be compatible with the national quality assurance systems in France (PQP) and Germany (SeedGuard). The move comes as the seed industry seeks to preserve essential plant protection products, protect the environment, maintain international trade, and ensure ongoing investment. Several big players, like Syngenta International AG, Bayer CropScience AG, Philagro France, Germains Seed Technology, and a few others, occupy a major portion of the market studied.

Europe Seed Treatment Market Trends

Decreasing Arable Land

The area under the cultivation of the major crops in the region, like cereals, grains, pulses, fruits, and vegetables, is decreasing year after year. For instance, according to the Statistisches Bundesamt, the federal authority of Germany, around 11.66 million hectares of agricultural land in Germany were used as arable land in 2021, a decrease when compared to 2020, where about 11.69 million hectares of agricultural land in Germany were used as arable land. Similarly, according to Eurostat, cereal crops represent 52% of the arable land in France. However, the value of the total cereals production sector in the country decreased to EUR 10,574 million (USD 10,871 million) in 2020 from EUR 13,012 million (USD 13,377 million) in 2019. Hence, to meet the increasing demand, farmers opt for treated seeds to increase the yield despite the decrease in the cultivation area. Additionally, the ban on GMO seeds and the need to enhance productivity encourage the seed treatment practice.

Moreover, the growing population and the increasing domestic and international demand for such crops in the region are driving the market studied. The seed treatment in the region is most widely used on cereals and grains. Hence, this segment holds the largest share of the overall seed treatment market volume. Thus, the decreased arable land in the region is anticipated to create an increase in the demand for treated seeds.

Biological Seed Treatment is the Fastest Growing Segment

The growing awareness among European countries about the negative effects of chemicals and pesticides is increasing the demand for non-chemical seed treatment products. For instance, according to FiBl, Europe's organic agricultural land area was approximately 17.1 million hectares in 2020. There has been a steady rise in the area of organic agricultural land during the last two and a half decades. In 1995 the area was only approximately 1.4 million hectares. The increasing demand for organically grown products resulted in the adoption of organic farming practices, which is expected to drive the market for biological or non-chemical seed treatment. Additionally, the high cost associated with hybrids and genetically modified seeds is also a major factor that is driving the growth of the biological seed treatment market across the region.

Moreover, the increase in interest in biological seed treatments as alternatives to chemical seed treatments is also supported by the fact that chemical seed treatments have several negative human health and environmental impacts. Consuming products having pesticide exposure may have negative health effects, such as respiratory problems, reproductive issues, endocrine system disruption, neurological damage, and increased risk of certain cancers. Similarly, they also have negative effects on farmers growing them. They may have short-term acute adverse effects on human health, like stinging eyes, rashes, blisters, skin irritations, blindness, nausea, dizziness, and diarrhea. Thus, the growing awareness about organic farming and the negative impacts of chemical seed treatments on human health and the environment in the region is resulting in the increasing use of biological seed treatment practices at a rapid rate.

Europe Seed Treatment Market Competitor Analysis

The seed treatment market is fragmented by many regional and international players. The major players in the market include Syngenta International AG, Bayer CropScience AG, Philagro France, Germains Seed Technology, and a few others, occupying a major portion of the market studied and having a diverse and increasing product portfolio. Companies are focusing majorly on new product launches, mergers, and acquisitions, which help in increasing their market shares. The development of bio-based seed treatment products has massive potential for expansion during the forecast period, with advantages, like environmental sustainability, lesser regulations for development, and the launch of new products.

Additional Benefits:

The market estimate (ME) sheet in Excel format
3 months of analyst support

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