

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

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Report description:

Key Highlights

The seed treatment market is anticipated to register a CAGR of 9.1% over the forecast period.

Seed treatment plays an important role in protecting the seeds and seedlings from seed and soil-borne diseases and insect pests affecting crop emergence and growth. The advancement in seed treatment technology and rising government support with the increasing demand for high-quality seeds from the farmers is driving the market growth during the forecast period. Farmers are increasingly considering seed treatment as a mode to protect investments made on good quality seeds due to increased regulatory issues relating to fumigation and foliar application of pesticides. Hence, the rising awareness among farmers is fueling the sales of seed treatment chemicals across the globe.

Additionally, as seed treatment is more effective and less labor-intensive than traditional spraying, it has become a more affordable crop protection method. Furthermore, to make seed treatment methods popular among farmers, various governments are organizing nationwide campaigns and promoting bills that will enable farmers to receive pesticides, herbicides, and fungicides at a subsidized price. Hence, increasing government support as well as the effectiveness of the seed treatment is likely to boost the growth of the seed treatment market in the coming years.

Increasing awareness of environmental and health concerns among the people, the growing popularity of organic farming, the high demand for agricultural goods free of chemical residues, and the efforts made by governments around the world to encourage the use of biological seed treatment are some crucial factors contributing to the growth of the market.

Seed Treatment Market Trends

Increasing Popularity of High-quality Seeds

The increasing popularity associated with hybrids and genetically modified seeds is a significant factor driving the growth of the global seed treatment market. Farmers are increasingly considering seed treatment to protect investments made on good quality

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seeds due to increased regulatory issues relating to fumigation and foliar application of pesticides.

Owing to an increase in the demand for high-quality seeds with desirable agronomic traits, the cost of seeds is expected to increase. Both companies and farmers are ready to spend on seed treatment solutions to save high-quality seeds. For example, Syngenta conducted a trial program for VICTRATO, a pioneering seed treatment for the prevention of crown rot in wheat, durum, and barley. The formulation was improved for Australian circumstances with assistance from the Seedcare Institute (SCI), a worldwide network of Syngenta facilities. In May 2022, Syngenta Crop Protection's Seedcare business launched VICTRATO, claiming it to be a novel technology with a powerful combination of nematode and disease control for growers looking to increase the quality and yield of their crops and support the long-term health of their soil.

Also, framers are trying to cut down operating costs by selecting seeds that do not require multiple doses of chemicals. The initial protection of these engineered seeds is ensured by using seed treatment products. In the past seven years, the seed's portion of total operating costs for corn has increased from about 28% to 32%. As most GM seeds are more productive as they are treated with biological and chemical treatments, there is an increase in area under GM crops, which is expected to positively affect the seed treatment market growth.

Europe Dominates the Seed Treatment Market

Europe witnessed the highest share in the seed treatment market, while Spain had the largest market for seed treatment, followed by France, Germany, and Russia. The growing popularity of agriculture in the region and the need for better-quality seeds are the major reasons for the market's growth. In significant crops, such as cereals (corn, barley, etc.) and fodder plants (alfalfa, clover, rapeseed, etc.), seed treatments are essential to prevent anthrax diseases, such as decay and bare smut. Moreover, seed treatments can also aid the early growth of the crop. Thus, the seed treatments based on manganese and zinc, which stimulate the plant's root system, are gaining popularity in the region.

In 2020, the sugar beet growers in Spain experienced crop damage and a decrease in yields by virus yellows. It created serious concerns among the farmers. They launched a plea to let them use Cruiser SB neonicotinoid treatment to reduce crop damage, which the government later approved. Thus, the increasing insect and pest attacks, the need of the growers to save the crop, and increasing yields are driving the market growth in the region.

According to a study, for every extra euro spent on this seed, relative to conventional seed, farmers gained an additional EUR 4.95 (USD 4.93) in extra income. These income gains have mostly come due to higher yields from the use of improved techniques, including seed treatments, which are influencing the growth of the market. In addition, the launch of seed treatment products by the major seed-producing companies in this region is aiding the growth of the seed treatment market. For instance, in 2021, KWS, a German seed-producing company, launched a biological seed treatment product in partnership with biotech company Evologic Technologies. Hence, the income gains obtained from the seed, along with the increased developments from the regional companies, contribute to the market's growth.

Seed Treatment Market Competitor Analysis

The seed treatment market is consolidated with several big players, such as Syngenta International AG, Bayer CropScience AG, BASF SE, Corteva Agriscience, and Croda International PLC. Major players in the market offer a diverse and increasing product portfolio. Companies are focusing majorly on new product launches and mergers & acquisitions, which help increase their market shares. The development of bio-based seed treatment products has massive potential for expansion during the forecast period, with several advantages, such as environmental sustainability and lesser regulations for developing and launching new products.

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

- 1.1 Study Assumptions & Market Definition
- 1.2 Scope Of The Study

2 RESEARCH METHODOLOGY

3 EXECUTIVE SUMMARY

4 MARKET DYNAMICS

- 4.1 Market Overview
- 4.2 Market Drivers
- 4.3 Market Restraints
- 4.4 Industry Attractiveness - Porter's Five Forces Analysis
 - 4.4.1 Bargaining Power of Suppliers
 - 4.4.2 Bargaining Power of Buyers
 - 4.4.3 Threat of New Entrants
 - 4.4.4 Threat of Substitute Products
 - 4.4.5 Intensity of Competitive Rivalry

5 MARKET SEGMENTATION

- 5.1 By Application
 - 5.1.1 Chemical
 - 5.1.2 Non-chemical/Biological
- 5.2 By Function
 - 5.2.1 Seed Protection
 - 5.2.2 Seed Enhancement
 - 5.2.3 Other Functions
- 5.3 By Crop Type
 - 5.3.1 Grains and Cereals
 - 5.3.2 Oilseeds
 - 5.3.3 Vegetables
 - 5.3.4 Other Crop Types
- 5.4 By Application Technique
 - 5.4.1 Seed Coating
 - 5.4.2 Seed Pelleting
 - 5.4.3 Seed Dressing
 - 5.4.4 Other Application Techniques
- 5.5 By Geography
 - 5.5.1 North America
 - 5.5.1.1 United States
 - 5.5.1.2 Canada
 - 5.5.1.3 Mexico

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5.5.1.4 Rest of North America

5.5.2 Europe

5.5.2.1 Spain

5.5.2.2 United Kingdom

5.5.2.3 France

5.5.2.4 Germany

5.5.2.5 Russia

5.5.2.6 Italy

5.5.2.7 Rest of Europe

5.5.3 Asia-Pacific

5.5.3.1 China

5.5.3.2 Japan

5.5.3.3 India

5.5.3.4 Australia

5.5.3.5 Rest of Asia-Pacific

5.5.4 South America

5.5.4.1 Brazil

5.5.4.2 Argentina

5.5.4.3 Rest of South America

5.5.5 Africa

5.5.5.1 South Africa

5.5.5.2 Rest of Africa

6 COMPETITIVE LANDSCAPE

6.1 Most Adopted Strategies

6.2 Market Share Analysis

6.3 Company Profiles

6.3.1 Adama Agricultural Solutions Ltd

6.3.2 Advanced Biological Marketing Inc.

6.3.3 BASF SE

6.3.4 Bayer Cropscience AG

6.3.5 Bioworks Inc.

6.3.6 Corteva Agriscience

6.3.7 Germains Seed Technology

6.3.8 Croda International PLC (Incotec Group BV)

6.3.9 Nufarm Ltd

6.3.10 Plant Health Care

6.3.11 Precision Laboratories Inc.

6.3.12 Syngenta International AG

6.3.13 Valent Biosciences Corporation

6.3.14 Verdesian Life Sciences

7 MARKET OPPORTUNITIES AND FUTURE TRENDS

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