

North America Seed Market - Size, Share, Covid-19 Impact & Forecasts Up To 2028

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Report description:

The North America Seed Market is projected to register a CAGR of 3.83%

Key Highlights

Largest Segment by Crop Family - Grains & Cereals : It is the largest segment as the United States is one of the largest producers of corn and wheat globally and has the availability of improved cultivars and transgenic seeds.

Largest Segment by Country - United States : It is a leading producer of high-value crops such as corn, soybean and cucumber, and the adoption of biotech crops as well as hybrid seeds are highest in the region.

Fastest-growing Segment by Crop Family - Unclassified Vegetables : It is growing fastest in the region due to an increase in the consumption of salad, growth in the protected cultivation of leafy vegetables and high Return on Investment.

Fastest-growing Segment by Country - Canada : Canada is one of the leading producers of grains and vegetables, favorable weather conditions, and high export demand for vegetables led to an increase in cultivation.

North America Seed Market Trends

Hybrids is the largest segment by Breeding Technology.

In North America, the hybrid seed segment dominated the markets in both volume and value. Hybrid seeds accounted for 82.5% of the total seed market value in 2021 due to an increased demand for grains, oils, and vegetables.

New plant breeding techniques allow the development of new plant varieties with desired traits by modifying the DNA of the seeds and plant cells. Innovations in plant breeding are helping to address the challenges farmers face in the field every day.

The companies are heavily investing in new plant technologies due to the increasing demand for advanced improved varieties adaptable to different climatic conditions, resistant to diseases, drought tolerant, and have high yield potential. For instance, in

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2020, Bayer opened its first fully automated greenhouse in Marana, Arizona, including innovation advancements in proprietary seed chipping and advanced marker technology.

In North America, hybrids are the fastest-growing segment. Hybrid seeds accounted for 64.9% of the total seed share in terms of volume in 2021. Among North American countries, demand for hybrid seeds witnessed major growth in countries such as Canada and Mexico due to high crop yield.

Among all the crops, wheat is the largest cultivated crop, with open-pollinated varieties accounting for 32.0% of the total open-pollinated varieties and hybrid derivatives value share in 2021. The advantages of open-pollinated varieties and derivatives include being well adapted to the local environment, allowing them to grow stronger, and requiring fewer inputs.

Thus, the low cost of open-pollinated varieties and increasing demand for hybrid seeds are expected to drive the market's growth.

United States is the largest segment by Country.

In 2021, North America was the major leading seed market in the world, which accounted for 37.5% of the global seed market in terms of value.

In the North American seed market, the United States is the largest seed market, and it had a market share of 68.8% in 2021, followed by Canada and Mexico.

In the United States, row crops accounted for about 27% of the market value of total global row crop seeds, and the vegetable crop seeds market accounted for about 18% of the global vegetable seed market value in 2021.

The cultivation of vegetable crops under protected conditions is booming in Mexico. Sinaloa accounts for the largest area under protected cultivation, followed by Jalisco with 3,310 ha, Baja California with 2,647, Mexico with 1,624 ha, Chihuahua with 1,496 ha, Sonora with 1,175 ha, Puebla with 1,045 ha, and few others. Majorly grown vegetables in protected cultivation are tomatoes, bell peppers, and cucurbits.

In Canada, there have been significant changes in the production of seeds because of COVID-19. The entire seed market experienced disruptions in supply chains and labor shortages, which decreased the total field vegetable production by 2.6%, and protected cultivation production increased by 3% in 2021.

In 2021, corn had the largest area under cultivation (7.2 million ha) in Mexico because of its high demand as food and feed for livestock as the number of livestock increased in the country.

The increase in the per capita consumption, the increase in the hybridization by seed companies, the increased investments, especially in Mexico, which is the largest importer of hybrid seeds, and the North America Free Trade Agreement facilitating imports and exports between North American countries are expected to boost the market on a large scale during the forecast period.

North America Seed Market Competitor Analysis

The North America Seed Market is moderately consolidated, with the top five companies occupying 58.18%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Land O'Lakes, Inc. and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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