

Africa Grain Seed Market - Size, Share, Covid-19 Impact & Forecasts Up To 2028

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Report description:

The Africa Grain Seed Market is projected to register a CAGR of 3.68%

Key Highlights

Largest Segment by Crop - Corn : The high share of corn is due to the high adoption of hybrids along with the increasing area under cultivation. It is one of the major grain crops cultivated in the region.

Largest Segment by Country - South Africa : The increased area under cultivation, adoption of transgenic hybrids in the case of corn, and high seed replacement rate comparatively helped to occupy the high share.

Fastest-growing Segment by Crop - Rice : The high growth rate of rice is mainly due to the development of hybrid rice, increasing farmers' interest to adopt the disease resistant and high yielding varieties.

Fastest-growing Segment by Country - Ghana : The fastest growth is due to the adoption of an import substitution strategy by the government where farmers receive subsidies for rice, corn, and sorghum cultivation.

Africa Grain Seed Market Trends

Hybrids is the largest segment by Breeding Technology.

Open-pollinated varieties dominated the market and held a share of 54.7% of the African grain seed market in 2021. Hybrid seeds held a share of 45.3% in terms of value in 2021.

In 2021, rice and wheat remained the two major crops grown in Africa using open-pollinated varieties and hybrid derivatives, accounting for 99% and 98% of the respective seed markets in Africa. The availability of disease-resistant and high-yielding open-pollinated varieties is expected to drive the market's growth.

Only five of the 47 countries approved the use of GMO crops, which include South Africa, Burkina Faso, Sudan, Egypt, and Nigeria.

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GMOs are gradually integrating into modern African agriculture.

In Africa, insect-resistant transgenic hybrids accounted for 78.6% of the transgenic seed market in 2022 in terms of value. Herbicide-tolerant hybrids accounted for 21.4% of the market in the same year.

South Africa dominates the African grain seed market in insect-resistant and herbicide-resistant traits. Herbicide-tolerant varieties were approved only in South Africa.

The share value of GM herbicide-tolerant grains is expected to grow by 24% from 2021 to 2028. In 2021, soybean dominated the herbicide-tolerant transgenic seed market in South Africa, with a market share of 86.5% in terms of value, followed by corn and cotton, with 12.7% and 1%, respectively.

The insect-resistant hybrid seeds market in Africa is expected to be dominated by corn due to the significant demand for the crop from the feed, fuel, and industrial sectors.

Non-transgenic hybrids account for 30% of the total seed market value. The non-transgenic hybrids' share increased by 10% in 2021 compared to 2020. The growth is associated with the rising demand for organic produce and rising per capita consumption.

South Africa is the largest segment by Country.

In 2021, grains and cereals held the largest share of the African seed market, accounting for 38% in terms of value. The main reason for the major share of grains and cereals is the increasing consumption with an increasing acreage under cultivation. South Africa holds the major market share, accounting for 47% of Africa's grains and cereal seed market because of the seed availability of new and improved varieties, access to the market, and an increase in the cultivation of highly profitable crops such as corn. Thus, the grain seed market share is expected to grow during the forecast period in South Africa from 47% in 2021 to 48% in 2028.

Ghana has the fastest growing-grains and cereal seed market, registering a CAGR of 4.2%. Rice is in high demand in the country, and the value of rice seeds is estimated to increase by 27.5% in 2027.

Corn has the largest seed market in Africa, and it accounted for 32% of the African grain seed market in 2021. South Africa holds the major share of the African corn market, accounting for a share of 54% by value in 2021 due to more area under cultivation, the approval of GM corn for cultivation, and the availability of hybrid varieties from global players that are suitable for local areas.

Ethiopia and South Africa have the fastest-growing wheat markets as the production area is increasing. The cultivation area for wheat increased by 5% from 2016 to 2021 in Africa. The increasing area under cultivation of profitable crops and growing consumption are driving the growth of the market.

Africa Grain Seed Market Competitor Analysis

The Africa Grain Seed Market is fragmented, with the top five companies occupying 21.37%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Seed Co Limited and Syngenta Group (sorted alphabetically).

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