

Africa Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030

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Report description:

The Africa Seed Market size is estimated at USD 3.12 billion in 2024, and is expected to reach USD 4.18 billion by 2030, growing at a CAGR of 5% during the forecast period (2024-2030).

Key Highlights

- Grains & Cereals is the Largest Crop Family: It is the largest segment as Africa is one of the largest producers of sorghum globally and rice and wheat are the staple food crops which were grown extensively.
- South Africa is the Largest Country: It is one of the major producers of corn and other cereals in the region. The majority of the corn area is under transgenic corn which contributes more to the market share.
- Roots & Bulbs is the Fastest-growing Crop Family: The fastest growth of the roots and bulbs is associated with the development of true seeds in case of potato and garlic, which is the emerging market in the future.
- Tanzania is the Fastest-growing Country: The increasing demand for commercial seeds in Tanzania is driven by the increasing area under corn and vegetables where the usage of hybrids and commercial seeds is high.

Africa Seed Market Trends

Open Pollinated Varieties & Hybrid Derivatives is the largest Breeding Technology

- In 2022, OPVs are likely to have a higher share in the African seed market because growers prefer to use low-cost OPVs as they are easily available at a minimal cost.

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- Non-transgenic hybrids accounted for 34.2% of the total seed market value in 2021. The non-transgenic hybrids' share increased by 3.4% in 2021 from the previous year.
- GMOs are gradually becoming a part of modern agriculture in Africa. Only 5 of 47 countries have approved the cultivation of GMO crops, including South Africa, Burkina Faso, Sudan, Egypt, and Nigeria.
- In an overall transgenic hybrid, herbicide-tolerant accounted for 42.7% of Africa in 2021. South Africa is the only country that allows herbicide-tolerant varieties. Soybean dominated the herbicide-tolerant transgenic seed market in South Africa, with a market share of 71.3% in terms of value, followed by corn (27.1%) and cotton (1.6%). In Africa, the area under herbicide tolerance was 297,607 ha in 2021.
- In Africa, insect-resistant transgenic hybrids dominated the transgenic seed market by holding 57.3% of the market share value in 2021. South Africa had the largest insect-resistant transgenic seed market, with a market share of 92.1%. Egypt (6.8%), Nigeria, Ethiopia, and the rest of the African countries accounted for 7.9% of the insect transgenic seed market in the African region.
- Out of the total seed market in Africa, the open-pollinated varieties and hybrid derivatives seed market in 2021 accounted for 50.1% in terms of value. The area under open-pollinated varieties and hybrid derivatives in Africa in 2021 was 30 million ha, an increase of 8.1% since 2016 because of the low cost and usage of seeds for the next season.

South Africa is the largest Country

- In 2021, Africa accounted for a 3.4% share value of the global seed market. Row crops held the largest share in Africa, accounting for 79.2% in 2021. The main reason for holding the major share by row crops is increasing consumption with an increasing acreage under cultivation.
- South Africa holds the major market share, which accounts for 46.2% of Africa's seed market because of the seed availability of new and improved varieties and access to the market, an increase in the cultivation of highly profitable crops such as corn and tomato grown in the country, and adoption of new technology to increase the production of crops. Therefore, it is anticipated that market share will boost during the forecast period 2022-2028 in South Africa
- Africa in the protected cultivation segment has a share value of less than 1% of the total seed market because there is no government support for setting up new greenhouse structures and lack of technical support and skills, and limited access to investment funding are major obstacles to the adoption of protected cultivation techniques by African growers.
- The major factor driving the market's growth is increasing the cultivation area under major crops. For instance, the area under cereals increased to 126 million hectares in 2020 from 123 million hectares in 2016.
- Therefore, the increasing area under cultivation of profitable crops and increasing consumption drive the market's growth.

Africa Seed Industry Overview

The Africa Seed Market is fragmented, with the top five companies occupying 15.67%. The major players in this market are BASF SE, Bayer AG, Groupe Limagrain, Rijk Zwaan Zaadteelt en Zaadhandel B.V. and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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