

Asia-Pacific Rice Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030

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Report description:

The Asia-Pacific Rice Seed Market size is estimated at USD 4.32 billion in 2024, and is expected to reach USD 5.22 billion by 2030, growing at a CAGR of 3.20% during the forecast period (2024-2030).

Key Highlights

- Open Pollinated Varieties & Hybrid Derivatives is the Largest Breeding Technology: These seeds are used by growers as they are cost-effective, organic cultivation, and for fresh market utilization as the rice produced has a good taste and is chemical free.
- China is the Largest Country: China is the largest seed market for rice because of the increase in the food demand of the rising population, the first hybrid variety of rice, and rice is a staple food.
- Open Pollinated Varieties & Hybrid Derivatives is the Fastest-growing Breeding Technology: It is expected to witness growth as the crop requires a large number of seeds to be sown for good cultivation and small-scale growers save input costs for cultivation.
- India is the Fastest-growing Country: India is the fastest growing segment due to an increase in the production of rice, an increase in the cultivation area, and growth in exports of rice to Middle East countries.

Asia-Pacific Rice Seed Market Trends

Open Pollinated Varieties & Hybrid Derivatives is the largest Breeding Technology

- In Asia-Pacific, the open-pollinated varieties and hybrid derivatives (OPV's) seed segment dominated the markets in terms of volume and value. In 2021, OPV rice seeds accounted for approximately 65.9% of the value of the total rice seed market.?

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- The adoption of open-pollinated varieties is mainly due to their lower cost than hybrid seeds. The most important aspect of hybrid rice is that the rice yield grain declines drastically after the first generation of seeds (F1). This compels farmers to purchase new seeds every season to cultivate hybrid rice. ?
- In 2021, hybrid rice seeds held nearly 34.1% of the market share value of the total rice seed market in the region. The hybrid rice market, in terms of value, is estimated to grow by around 35.0% during the forecast period (2022-2028), mainly due to increasing food demand due to the rising population in the region. ?
- Hybrid rice seeds improve food security by nearly 15-20% compared to OPV rice seeds. Another major factor likely to drive the prospects of hybrid rice seeds is their capacity to withstand abiotic and biotic stresses.?
- Thus, due to the low adoption rate of hybrid rice and the lack of proper input assistance, the OPVs market has dominated the market more than hybrid seeds in many countries. Thus, to increase the farmers' incentive to adopt hybrid rice, a hybrid variety that produces superior grain quality and resistance to stresses must be developed and distributed reasonably in major rice-producing countries in the region.

China is the largest Country

- In Asia-Pacific, China dominates the rice seed market, and it accounted for 44.7% of the market share in terms of value in 2021, followed by India (14.9%), the Philippines (9.1%), Japan (8.0%), etc.??
- In China, rice is one of the prominent cereal crops, and about 65% of Chinese people rely on rice. Globally, China holds a 32.6% market share in the total rice seed market value.?
- The area under rice cultivation in China was 30 million hectares in 2021, which was a decrease of 3.5% from 2016 due to crop diversification and urbanization in the country. However, the usage of hybrids increased production in the country.
- In 2020-21, India's rice exports increased by 87% to 17.72 million ton (MT) from 9.49 million ton in 2019-20. India has the highest export volume of rice globally, with 15.5 million metric ton exported during 2020-2021. The increased demand for exports is increasing crop production in the country.
- The transgenic rice grown commercially in the Philippines is Golden rice (GR), which accounted for 3.5% of the country's hybrid rice seed market value in 2021. Golden rice (GR) is a transgenic rice that is an effective source of Vitamin A. The transgenic rice segment is projected to register a CAGR of 8.2% in the Philippines during the forecast period (2022-2028). The high growth rate is mainly because of the increasing demand for golden rice, as the Philippines is the first country to grow it commercially.??
- Thus, the stable demand for consumption and increased use of hybrid seeds for higher productivity are expected to help the growth of the rice seed market during the forecast period.

Asia-Pacific Rice Seed Industry Overview

The Asia-Pacific Rice Seed Market is fragmented, with the top five companies occupying 12.41%. The major players in this market are Advanta Seeds - UPL, Bayer AG, Corteva Agriscience, Syngenta Group and Yuan Longping High-Tech Agriculture Co., Ltd (sorted alphabetically).

Additional Benefits:

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

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