

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

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

Report description:

The Asia-pacific Seed Market size is estimated at USD 22.29 billion in 2024, and is expected to reach USD 27.97 billion by 2030, growing at a CAGR of 3.86% during the forecast period (2024-2030).

Key Highlights

- Grains & Cereals is the Largest Crop Family: Grains and cereals have a high market share as wheat and rice is a staple food for the majority of countries in the region and biotech grain seeds are used in the region.
- China is the Largest Country: China is having the largest number of transgenic crops approved for cultivation in the region and it was the first country to develop hybrid seed variety of rice.
- Roots & Bulbs is the Fastest-growing Crop Family: The segment is the fastest growing due to growers in the Philippines cultivating more onion now than rice and it is a major crop segment for growers in India and Pakistan.
- Myanmar is the Fastest-growing Country: It is the fastest growing as the growers increased corn cultivation for a high ROI and the government is helping to increase domestic production to lower the import quantity.

Asia-pacific Seed Market Trends

Hybrids is the largest Breeding Technology

- In the Asia-Pacific region, hybrid seeds dominated the seed market, with a share of 65.1% in 2021 in terms of value. Out of the total hybrid seed market value, row crops accounted for an 86.4% share, whereas vegetables accounted for a 13.6% share in

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

2021.

- The hybrid segment has a major share because of higher productivity, wider adaptability, and a high degree of resistance to biotic and abiotic stresses. For instance, in cotton, hybrids give 50% more yield than conventional varieties. The wider adaptability of hybrids is mainly due to their high buffering capacity to environmental fluctuations. Thus, the demand for hybrid seeds is expected to increase during the forecast period.
- In 2021, among the row crops hybrids, transgenic hybrids accounted for 18.2% of the market share, whereas non-transgenic hybrids accounted for 81.8% of the market share in terms of value.
- In the Asia-Pacific region, among hybrids, insect-resistant transgenic hybrids dominate the transgenic seed market, with a share of 75.3% of the market share value in 2021. The crops with insect-resistant traits approved for cultivation in the region are corn, cotton, and rice.
- Open-pollinated varieties and hybrid derivatives held a market share value of 34.9% in 2021 in the Asia-Pacific region because, in countries such as India, the government is actively promoting locally bred open-pollinated varieties by capping the prices that international seed companies can charge to help increase the usage of OPVs. ?
- The increased availability of hybrids and improved OPVs resulted in many advantages, such as yield improvement, higher prices for seeds, and availability of seeds at an affordable price. These factors are expected to drive the growth of the Asia-Pacific seed market during the forecast period.

China is the largest Country

- In the Asia-Pacific region, China dominates the seed market, accounting for 54.5% of the market share in terms of value, followed by India (14.7%), Japan (5.6%), Indonesia (4.5%), and the Philippines (3.0%), in 2021.?
- In India, to support the development of the seed industry, the Government of India launched many schemes, such as the Seed Village Program, Integrated Scheme on Oilseeds, transport subsidy on the movement of seeds to the North Eastern States in India, and hybrid rice seed production, which support the cost of production, distribution, and transportation.??
- In Australia, the row crops segment holds the largest market share, accounting for 82.8%, and vegetables account for 17.2% of the total seed market. Wheat is one of the major row crops grown in the country, accounting for 13.0% of the total row crops' seed market value.?
- Rice is the main staple food crop in Japan. Rice alone accounted for 72.0% of the total area under row crops in 2020. The increasing consumer demand and the need to improve productivity will fuel the demand for high-yielding varieties in the country.?
- In 2017, Indonesia's Ministry of Agriculture selected an improved soybean variety called Mutiara, which is tolerant to flood and submergence and is developed using nuclear techniques to increase the domestic production of soybean and decrease its dependency on imports,? driving the increase in demand for seeds.?
- In the Philippines, farmers are shifting from rice production to onion farming, as it helps them raise their incomes. This may also offer the country the provision of not being dependent on imports, thereby driving the onion seed market in the region.??

Asia-Pacific Seed Industry Overview

The Asia-Pacific Seed Market is fragmented, with the top five companies occupying 21.21%. The major players in this market are Advanta Seeds - UPL, Bayer AG, Corteva Agriscience, East-West Seed and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Area Under Cultivation

4.2 Most Popular Traits

4.3 Regulatory Framework

4.4 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION

5.1 Breeding Technology

5.1.1 Hybrids

5.1.1.1 Non-Transgenic Hybrids

5.1.1.2 Transgenic Hybrids

5.1.1.2.1 Herbicide Tolerant

5.1.1.2.2 Insect Resistant

5.1.1.2.3 Other Traits

5.1.2 Open Pollinated Varieties & Hybrid Derivatives

5.2 Cultivation Mechanism

5.2.1 Open Field

5.2.2 Protected Cultivation

5.3 Crop Type

5.3.1 Row Crops

5.3.1.1 Fiber Crops

5.3.1.1.1 Cotton

5.3.1.1.2 Other Fiber Crops

5.3.1.2 Forage Crops

5.3.1.2.1 Alfalfa

5.3.1.2.2 Forage Corn

5.3.1.2.3 Forage Sorghum

5.3.1.2.4 Other Forage Crops

5.3.1.3 Grains & Cereals

5.3.1.3.1 Corn

5.3.1.3.2 Rice

5.3.1.3.3 Sorghum

5.3.1.3.4 Wheat

5.3.1.3.5 Other Grains & Cereals

5.3.1.4 Oilseeds

5.3.1.4.1 Canola, Rapeseed & Mustard

5.3.1.4.2 Soybean

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.3.1.4.3 Sunflower
- 5.3.1.4.4 Other Oilseeds
- 5.3.1.5 Pulses
- 5.3.2 Vegetables
 - 5.3.2.1 Brassicas
 - 5.3.2.1.1 Cabbage
 - 5.3.2.1.2 Carrot
 - 5.3.2.1.3 Cauliflower & Broccoli
 - 5.3.2.1.4 Other Brassicas
 - 5.3.2.2 Cucurbits
 - 5.3.2.2.1 Cucumber & Gherkin
 - 5.3.2.2.2 Pumpkin & Squash
 - 5.3.2.2.3 Other Cucurbits
 - 5.3.2.3 Roots & Bulbs
 - 5.3.2.3.1 Garlic
 - 5.3.2.3.2 Onion
 - 5.3.2.3.3 Potato
 - 5.3.2.3.4 Other Roots & Bulbs
 - 5.3.2.4 Solanaceae
 - 5.3.2.4.1 Chilli
 - 5.3.2.4.2 Eggplant
 - 5.3.2.4.3 Tomato
 - 5.3.2.4.4 Other Solanaceae
 - 5.3.2.5 Unclassified Vegetables
 - 5.3.2.5.1 Asparagus
 - 5.3.2.5.2 Lettuce
 - 5.3.2.5.3 Okra
 - 5.3.2.5.4 Peas
 - 5.3.2.5.5 Spinach
 - 5.3.2.5.6 Other Unclassified Vegetables
- 5.4 Country
 - 5.4.1 Australia
 - 5.4.2 Bangladesh
 - 5.4.3 China
 - 5.4.4 India
 - 5.4.5 Indonesia
 - 5.4.6 Japan
 - 5.4.7 Myanmar
 - 5.4.8 Pakistan
 - 5.4.9 Philippines
 - 5.4.10 Thailand
 - 5.4.11 Vietnam
 - 5.4.12 Rest of Asia-Pacific

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Advanta Seeds - UPL
 - 6.4.2 BASF SE
 - 6.4.3 Bayer AG
 - 6.4.4 Bejo Zaden B.V.
 - 6.4.5 Corteva Agriscience
 - 6.4.6 East-West Seed
 - 6.4.7 Groupe Limagrain
 - 6.4.8 Rijk Zwaan Zaadteelt en Zaadhandel B.V.
 - 6.4.9 Syngenta Group
 - 6.4.10 Yuan Longping High-Tech Agriculture Co., Ltd

7 KEY STRATEGIC QUESTIONS FOR SEEDS CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Global Market Size and DROs
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4750.00
	Team License (1-7 Users)	\$5250.00
	Site License	\$6500.00
	Corporate License	\$8750.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-06
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com