

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

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

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Report description:

The Europe Forage Seed Market size is estimated at USD 1.27 billion in 2024, and is expected to reach USD 1.60 billion by 2030, growing at a CAGR of 3.92% during the forecast period (2024-2030).

Key Highlights

- Forage Corn is the Largest Crop: Europe witnessed an increase in the demand for forage corn seeds due to an increase in the demand for feed by dairy farmers and an increase in the production of biogas.
- Germany is the Largest Country: The market in Germany has witnessed growth due to the growing demand for feed products, consumer demand for livestock products, and shrinking land for grazing animals.
- Alfalfa is the Fastest-growing Crop: Alfalfa is having high demand in the region by dairy farmers for animal feed, it can be harvested 10-12 times per crop season and has high nutritional protein content.
- Italy is the Fastest-growing Country: Italy is having a high demand for Forage Crops due to the demand for better-quality meat, high Return on Investment, awareness among farmers, and increase in livestock feed.

Europe Forage Seed Market Trends

Hybrids is the largest Breeding Technology

- In 2021, hybrids dominated the European forage seed market, accounting for 80.4% of the market share. Open-pollinated varieties accounted for 19.6% in the same year. The high share of hybrids is associated with traits such as high yielding, disease

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resistance, high vigor, and high palatability.

- Only non-transgenic hybrid varieties are approved for cultivation due to the ban on genetically engineered crops, as they are perceived to have transgenic traits on livestock and animal health.
- In 2021, forage corn held the major share of 88.8% in the hybrid segment due to the large area under cultivation and higher adoption of hybrids. The hybrid seed volume increased by 3.7% in 2020 compared to the previous year. The increase in the volume share was primarily due to increased forage demand from large commercial dairy farms.
- Alfalfa held a share value of 10.4% in the European hybrid forage seed market in 2021 due to the high seed replacement rate and high demand from the livestock industry, which may further increase the sales of hybrid seeds during the forecast period.
- Europe is one of the largest producers of non-transgenic hybrid forage corn, contributing a 80.2% share value of the European forage seed market in 2021. The demand for non-transgenic hybrid forage corn seeds in the region may increase further during the forecast period due to their high nutritional value.
- Germany was the major country in terms of area under OPVs in 2021. The country has a 50% area of the total European open-pollinated varieties and hybrid derivatives forage due to the prevalence of native and unimproved pastures in the country. The use of OPVs lowers cultivation costs, which is likely to boost their use further in the future.

Germany is the largest Country

- Europe is the primary producer of forages. It contributed 15.2% to the European seed market and 32.7% to the global forage seed market in terms of value in 2021. The forage market in the region is being driven by the increasing animal population and rising meat consumption.
- Germany is the largest producer of forage corn in Europe, with a market share value of 30.8% in the global forage corn seed market in 2021, followed by France, with a 29.4% share value. The driving factors include growing demand for feed products, consumer demand for livestock products, an increase in the livestock population, and shrinking land for grazing animals.
- Italy, France, and Spain were the major producers of alfalfa in Europe, accounting for 16.2% of the global alfalfa seed market in 2021. The export demand for alfalfa is driving the market in these countries.
- In 2021, France, Italy, and Russia held the largest share of forage sorghum in Europe, contributing 4.2% to the global forage sorghum seed market. France had the largest forage sorghum seed market in Europe, accounting for 38.7% in terms of value. As per the USDA, the production quantity under sorghum forage doubled in France in the past few years and reached 422,900 metric ton in 2021.
- The European seed association regulation, which governs the forage seed market, has made significant investments in forage seed production to enhance the unpredictability of the seed cycle, soil conditions, and time incentive returns. Therefore, the forage seed market is estimated to register a CAGR of 5.3% during the forecast period.

Europe Forage Seed Industry Overview

The Europe Forage Seed Market is fragmented, with the top five companies occupying 30.26%. The major players in this market are Advanta Seeds - UPL, DLF, InVivo, RAGT Semences and Royal Barenbrug Group (sorted alphabetically).

Additional Benefits:

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

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