

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

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Report description:

The Europe Grain Seed Market size is estimated at USD 7.18 billion in 2024, and is expected to reach USD 9.57 billion by 2030, growing at a CAGR of 4.91% during the forecast period (2024-2030).

Key Highlights

- Corn is the Largest Crop: The increase in the demand for corn is due to the high-value crop, high Return on Investment, and increase in the demand by the lubricants industry for biofuel production.
- France is the Largest Country: France has an increase in the adoption of hybrid seeds, an increase in the demand for biofuel extraction by the lubricants industry, and the adoption of new technology.
- Corn is the Fastest-growing Crop: The increase in the demand for corn is due to the increase in the demand for corn by the lubricants industry, dairy farmers for livestock feed and high Return on Investment.
- Ukraine is the Fastest-growing Country: The country witnessed the fastest growth because it is the largest producer of wheat in Europe and adoption of hybrid seeds has led to increase in the export of grains.

Europe Grain Seed Market Trends

Hybrids is the largest Breeding Technology

- In Europe, the hybrid seed segment dominated the market in terms of volume and value. Non-transgenic hybrids accounted for 50.9% of the total grain seed market value in 2021. The non-transgenic hybrids' share increased by 6.5% in 2021 from the

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previous year due to the expansion of planting area under grains, rising demand for organic produce, and rising per capita consumption.

- An increase in area under organic farming and conventional farming are major factors driving the growth of non-transgenic hybrids. For instance, the organic farming area under cereals in Europe increased by 30% between 2016 to 2021. The organic area under farming was 3.02 million hectares in 2021.
- In 2021, insect resistance was the only trait grown under transgenic hybrids in Europe, contributing to 1.2% of the European seed market. Major countries growing insect-resistant crops (corn) in Europe are Spain and Romania. Countries in the Rest of Europe, such as Portugal, Czechia, and Slovakia, are the largest areas that grow transgenic insect-resistant corn, in 2021, accounting for 68.6% of the European transgenic seed market.
- Wheat and other grains and cereals (oats and barley) were the major crops grown in Europe using open-pollinated varieties and hybrid derivatives in 2021, accounting for about 86.4% of the total OPV seeds market in Europe.
- The usage of commercial seeds is expected to increase as the demand for meat and livestock products has been increasing in the region, compensated by GM crops as animal feed. Thus, with the emergence of new insect pests, the insect-resistant transgenic hybrid seed market is projected to grow in the country during the forecast period.

France is the largest Country

- In Europe, the grain seed segment was the major contributor to the overall seed market. It contributed 49.5% to the Europe seed market in terms of value in 2021. The region is a major producer of corn, with a share value of 10.9% in the global corn seed market in 2021.
- France is the leading producer of corn. Corn is grown across France, with the country's southern region producing the majority of the crop. The Aquitaine region contributed 21% of overall corn production in the country, while the French state of Midi-Pyrenees contributed 13% in 2020. The crop is planted in the country between April and May and harvested between September and November.
- France is also a primary producer and exporter of sorghum in Europe, contributing 42.7% to the European sorghum seed market value in 2021. The majority of sorghum traded in Europe come from local sources.
- Italy is the major rice producer in Europe. It accounted for 53.8% of the share value in the European rice seed market in 2021. Most rice production is done in the northern Piemonte, Lombardia, and Veneto regions since water is abundant there, and the rice crop can be grown in wet places. Most rice varieties in Italy are Japonica, with the rest having Indica.
- Spain, Italy, and Turkey were the major producers of wheat in Europe, together accounting for 8.7% of the global wheat seed market in 2021. The export demand for wheat is moving in an upward trend.
- The Rest of the Europe grain seed market comprises Hungary, Austria, Sweden, Bulgaria, and other countries. According to our estimates Rest of Europe's grain seeds held a share of 13.4% of the Europe grain seed market in 2021.

Europe Grain Seed Industry Overview

The Europe Grain Seed Market is moderately consolidated, with the top five companies occupying 62.63%. The major players in this market are Bayer AG, Corteva Agriscience, Groupe Limagrain, KWS SAAT SE & Co. KGaA and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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