

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

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Report description:

The Europe Seed Market size is estimated at USD 13.11 billion in 2024, and is expected to reach USD 18.01 billion by 2030, growing at a CAGR of 5.44% during the forecast period (2024-2030).

Key Highlights

- Grains & Cereals is the Largest Crop Family: Europe is the largest producer of grains and has an increase in the demand for the production of biofuel using corn. Ukraine is the largest producer of wheat in Europe.
- 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.
- Fiber Crops is the Fastest-growing Crop Family: There is an increase in demand by industries such as textile and cosmetic industry, an increase in usage of eco-friendly packaging, and high net returns from commercial crops.
- Italy is the Fastest-growing Country: It is the fastest growing because of the increase in the consumption of salad, the leading producer of peas globally, and the increase in the demand for feed by dairy farmers.

Europe Seed Market Trends

Hybrids is the largest Breeding Technology

- In Europe, the hybrid seed segment dominated the market. Hybrid seeds accounted for 66.8%, and open-pollinated varieties and hybrid derivatives accounted for 33.2% in 2021. Due to high productivity, the demand for hybrid seeds has witnessed major

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growth in countries such as Spain, Italy, and the United Kingdom.

- In the vegetable seed market, hybrid vegetables held 79.8% of the market share in 2021. The hybrids are largely developed in tomatoes, cucurbits, brassicas, and leafy vegetables.
- Non-transgenic hybrids dominate the market because of the ban on GMO crops in many countries such as France, Germany, Austria, Greece, Hungary, the Netherlands, Latvia, Lithuania, Luxembourg, Bulgaria, Poland, Denmark, Malta, Slovenia, Italy, and Croatia. These countries have chosen a total ban on GMO crops.
- In Europe, only insect-resistant hybrids are cultivated under transgenic hybrids. Corn is the only grain crop approved for commercial cultivation in countries such as Spain, Romania, and the rest of Europe (Portugal, Czechia, and Slovakia). Maize in Europe was a major GM crop, with a market value of about 1.2% of the European seed market in 2021.
- In Europe, the row crops held a major share in open-pollinated varieties market value, accounting for about 91.7% in 2021. Row crops require a high volume of seeds for sowing (seed rates are comparatively higher), and prices are 20-30% less compared to the hybrid. Other grains and cereals were the major crops grown in Europe using open-pollinated varieties and hybrid derivatives in 2021, holding a share of 36.2% of the total open-pollinated varieties seeds market value in the region.

France is the largest Country

- In Europe, the agriculture industry is the major contributor to the economy. It contributed 15% to the global seed market in terms of value in 2021. The region is a major producer of forages, with a share value of 32.7% in the global forage seed market in 2021.
- The major crops grown in the region are potatoes, carrots, cauliflower and broccoli, spinach, and peas in vegetables and forage corn, alfalfa, sunflower, corn, and pulses in row crops.
- In 2021, France held the highest share of 21.2% in the European seed market value, followed by Germany at 10.5% and Italy at 9.7%. France is also one of the largest producers of sunflowers in Europe.
- In 2021, the Netherlands was the largest producer of onion and potato in the world, with 5.3% and 3.9% share value in their respective global market. Germany was the largest producer of forage corn in the world, with a 22.6% share value in the global forage corn seed market.
- Europe is one of the largest producers of forage corn, contributing 89.1% of the European forage seed market and 66.4% of the global forage corn seed market in 2021. The driving factors include growing demand for feed products, consumer demand for livestock products, and shrinking land for grazing animals.
- Major companies are investing in making seed quality better due to the rise in demand. For instance, in 2021, DLF Seeds, the world's leading forages and a grass seed breeder, invested USD 4.6 million in new state-of-the-art mixing and distribution facilities to bring much-needed additional capacity and efficiency to cope with the future market demands in the amenity, consumer, and environmental stewardship in the forage seed market.

Europe Seed Industry Overview

The Europe Seed Market is fairly consolidated, with the top five companies occupying 66.10%. 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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