

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

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Report description:

The Europe Vegetable Seed Market size is estimated at USD 2.45 billion in 2024, and is expected to reach USD 3.66 billion by 2030, growing at a CAGR of 6.92% during the forecast period (2024-2030).

Key Highlights

- Brassicas is the Largest Crop Family. It is the fastest growing, due to the growing demand for carrots, cabbages, and broccoli from the consumers & processing industry and its adaptability to different environments.
- Italy is the Largest Country. It is the largest segment because of the increase in the cultivation area, increase in the adoption of protected cultivation and increase in the use of hybrid seeds.
- Solanaceae is the Fastest-growing Crop Family. There is an increase in the demand for Solanaceae crops by the processing industry and Romania and Italy are leading producers of chili and eggplant respectively.
- Italy is the Fastest-growing Country. It is the fastest growing segment because of the increase in the consumption of salad, the leading producer of peas globally, and increase in the adoption of new technology.

Europe Vegetable Seed Market Trends

Hybrids is the largest Breeding Technology

- The hybrid seed segment dominated the European market in terms of volume and value in 2021. Hybrids are largely developed in tomatoes, onions, peas, cabbages, carrots, pumpkins, and squash, with a market share of 13.8%, 9.3%, 8.8%, 7.7%, 7.6%, and

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7.4%, respectively. These are the most traded and most consumed vegetables in the region.

- In 2021, brassicas and unclassified vegetables held a major share of 26.3% and 26.0%, respectively, in the hybrid vegetable seed market. Hybrid vegetable seeds have improved shelf life traits, thus boosting their preference among vegetable growers.
- The open-pollinated varieties are largely developed in tomato, peas, carrot, and pumpkin and quash, together accounting for a market share of 35.2% in 2021.
- In 2021, France, Italy, and Spain were some of the major vegetable-producing countries using open-pollinated varieties (OPVs), together accounting for 42.8% of the total European OPV vegetable seed market.
- The organic farming area in Europe increased by 26% between 2016 and 2021. The organic area under farming was 17.09 million ha in 2021. Therefore, non-transgenic seeds may experience huge demand during the forecast period.
- Bayer intended to expand its vegetable seed offerings under the new umbrella to include organically produced seeds. The launch will concentrate on certified organic production of three major crops for the greenhouse and glasshouse market, namely, tomato, sweet pepper, and cucumber.
- Therefore, the hybrid seed segment is expected to have a high growth rate compared to OPV seeds, at a CAGR of 5.9%, during the forecast period.

Italy is the largest Country

- In Europe, the demand for vegetables is growing rapidly. It contributed 19.3% to the global vegetable seed market in terms of value in 2021. The region is a significant producer of brassicas, holding a share of 26.4% in the global brassicas seed market in 2021.
- The major vegetable crops grown in the region are potatoes, carrots, cauliflower and broccoli, spinach, and peas. The Netherlands is one of the major producers of onions and potatoes in the world, holding a share of 5.3% and 3.9% in the respective global markets in 2021.
- Italy holds the top position in Europe, followed by Spain, France, and Russia. These countries accounted for 14.6%, 13.7%, 12.1%, and 10.4% of the total European vegetable seed market in 2021.
- In the European vegetable seed market, unclassified vegetables contributed a major share of 27.6% in 2021, followed by brassicas (26.6%), Solanaceae (16.9%), roots and bulbs (14.6%), and cucurbits (14.4%).
- Europe is one of the largest producers and traders of potatoes, holding a market share of 36.1% in the global potato seed market in 2021. In the same year, the major countries in the region with high market share were Ukraine (20.4%), Germany (16.6%), France (15.4%), and the Netherlands (10.8%).
- In 2016, the area under cultivation for vegetables in Europe was approximately 8.7 million ha, which decreased to 8.3 million ha in 2020. There is an increasing demand for vegetables for consumption in the region, which can be catered to by increased productivity through the use of improved varieties. Therefore, the demand for improved seeds is anticipated to increase in the region during the forecast period.

Europe Vegetable Seed Industry Overview

The Europe Vegetable Seed Market is moderately consolidated, with the top five companies occupying 63.20%. The major players in this market are BASF SE, Bayer AG, Groupe Limagrain, Rijk Zwaan Zaadteelt en Zaadhandel B.V. and Syngenta Group (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format

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