

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

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Report description:

The North America Grain Seed Market size is estimated at USD 14.87 billion in 2024, and is expected to reach USD 22.17 billion by 2030, growing at a CAGR of 6.88% 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.
- United States is the Largest Country: The country is the second-largest producer of grains globally with corn and wheat being the major contributors. The country is the leading producer of biofuel globally.
- Sorghum is the Fastest-growing Crop: The market expansion for sorghum seeds is driven by the crop's ability to adapt to changing weather conditions, and an increase in the demand for animal feed by dairy farmers.
- Canada is the Fastest-growing Country: It is an emerging market for grain seeds due to an increase in the demand for corn flour and growing tortilla prices have led to an increase in the demand for grain seeds.

North America Grain Seed Market Trends

Hybrids is the largest Breeding Technology

- In North America, the hybrid seed segment dominated the markets in both volume and value. In 2022, Hybrid grain seeds accounted for 80.1% in terms of the value of row crops due to an increased demand for grains. Among hybrids, the major crop

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produced is corn, which accounted for about 94.4% of the grains in 2021.

- The growing demand for hybrid and open-pollinated seeds from organic growers, animal feed, food, and the biofuels industry is driving the market's growth. Due to the increasing crop yield, the demand for hybrid seeds witnessed major growth in countries such as Canada and Mexico.
- New plant breeding techniques are allowing the development of new plant varieties with desired traits by modifying the DNA of the seeds and plant cells. Innovations in plant breeding are helping address the challenges farmers face in the field every day.
- In the region, open-pollinated varieties are often used in grains and cereals crops such as wheat, millet, and other cereals due to high volume seed requirements.
- In the grains and cereals segment, wheat is the most cultivated crop, with the use of open-pollinated varieties accounting for 20.1% of total open-pollinated varieties and hybrid derivatives value share for grains and cereals in 2021.
- The adoption of improved open-pollinated varieties has many benefits, such as high yield, and is well-adapted to the local environment, allowing crops to grow stronger.
- There is an increasing demand for hybrid seeds due to the high yield and less production area required for the same output by open-pollinated varieties, which is expected to drive the growth of hybrid seeds in the market.

United States is the largest Country

- According to estimates, the total acreage under grains and cereals in North America in 2021 was 82.4 million hectares, which increased by 2.0% compared to the previous year due to an increase in the processing facilities and governments pushing the adoption of self-sufficiency as grains and cereals are the staple food in the diet.
- The total grains and cereals accounted for 59.6% of the total North American seed market in 2021 in terms of seed production value.
- The United States is the second-largest producer of grains and cereals in the world, with corn and wheat being the major contributors. The corn seed market in the United States contributes around 39.8% of the total United States seed market.
- Canada is the fifth-largest producer of wheat, producing more than the required for consumption. The increased consumption of fresh or processed grains and cereals and increased animal production and industrial utilization are increasing the acreage of grains and cereals in the country.
- Mexico is the leading producer of corn, with the increased usage of GM corn until 2020. In 2020, GM corn was banned, and the Mexican government wants to remove GMOs from the country by 2024. The acreage under corn has been reduced. The grains and cereals demand has been increasing as the majority of seeds used currently are imported from other countries.
- The total grains and cereals seed market of the Rest of North America accounted for 5.6% of the total North American grains and cereals seed market value in 2021.
- The increase in government support for lost resources during climate abnormalities, increased awareness to reduce imports, and continuous demand for staple foods, such as grains and cereals, are expected to boost the seed market in the region.

North America Grain Seed Industry Overview

The North America Grain Seed Market is moderately consolidated, with the top five companies occupying 61.25%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Land O'Lakes, Inc. and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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