

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

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Report description:

The North America Seed Market size is estimated at USD 25.60 billion in 2024, and is expected to reach USD 36.98 billion by 2030, growing at a CAGR of 6.32% during the forecast period (2024-2030).

Key Highlights

- Grains & Cereals is the Largest Crop Family. It is the largest segment as the United States is one of the largest producers of corn and wheat globally and has the availability of improved cultivars and transgenic seeds.
- United States is the Largest Country. It is a leading producer of high-value crops such as corn, soybean and cucumber, and the adoption of biotech crops as well as hybrid seeds are highest in the region.
- Brassicas is the Fastest-growing Crop Family. It is the fastest growing, due to the increased production and growing demand from the processing industry, and its adaptable nature to wider growing environments.
- Canada is the Fastest-growing Country. Canada is one of the leading producers of grains and vegetables, favorable weather conditions, and high export demand for vegetables led to an increase in cultivation.

North America Seed Market Trends

Hybrids is the largest Breeding Technology

- In North America, the hybrid seed segment dominated the markets in both volume and value. Hybrid seeds accounted for 82.8% of the total seed market value in 2021 due to an increased demand for grains, oils, and vegetables.

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- New plant breeding techniques allow 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 to address the challenges farmers face in the field every day.
- The companies are heavily investing in new plant technologies due to the increasing demand for advanced improved varieties adaptable to different climatic conditions, resistant to diseases, drought tolerant, and have high yield potential. For instance, in 2020, Bayer opened its first fully automated greenhouse in Marana, Arizona, including innovation advancements in proprietary seed chipping and advanced marker technology.
- In North America, hybrids are the fastest-growing segment. Hybrid seeds accounted for 68.1% of the total seed share in terms of volume in 2021. Among North American countries, demand for hybrid seeds witnessed major growth in countries such as Canada and Mexico due to high crop yield.
- Among all the crops, wheat is the largest cultivated crop, with open-pollinated varieties accounting for 31.0% of the total open-pollinated varieties and hybrid derivatives value share in 2021. The advantages of open-pollinated varieties and derivatives include being well adapted to the local environment, allowing them to grow stronger, and requiring fewer inputs.
- Thus, the low cost of open-pollinated varieties and increasing demand for hybrid seeds are expected to drive the market's growth.

United States is the largest Country

- In 2021, North America was the major leading seed market in the world, which accounted for 38.3% of the global seed market in terms of value. The United States is the largest seed market, and it had a market share of 69.8% in 2021, followed by Canada and Mexico.
- In the United States, row crops accounted for about 27.8% of the market value of total global row crop seeds, and the vegetable crop seeds market accounted for about 17.5% of the global vegetable seed market value in 2021.
- The cultivation of vegetable crops under protected conditions is booming in Mexico. Sinaloa accounts for the largest area under protected cultivation, followed by Jalisco with 3,310 ha, Baja California with 2,647, Mexico with 1,624 ha, Chihuahua with 1,496 ha, Sonora with 1,175 ha, Puebla with 1,045 ha, and few others. Majorly grown vegetables in protected cultivation are tomatoes, bell peppers, and cucurbits.
- In Canada, there have been significant changes in the production of seeds because of COVID-19. The entire seed market experienced disruptions in supply chains and labor shortages, which decreased the total field vegetable production by 2.6%, and protected cultivation production increased by 2.2% from 2020-2021
- In 2021, corn had the largest area under cultivation (7.2 million ha) in Mexico because of its high demand for food and feed for livestock as the number of livestock increased in the country.
- The increase in per capita consumption, the increase in the hybridization by seed companies, the increased investments, especially in Mexico, which is the largest importer of hybrid seeds, and the North America Free Trade Agreement facilitating imports and exports between North American countries are expected to boost the market on a large scale during the forecast period.

North America Seed Industry Overview

The North America Seed Market is moderately consolidated, with the top five companies occupying 58.18%. 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

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