

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

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The North America Tomato Seed Market size is estimated at USD 151.56 million in 2024, and is expected to reach USD 235.29 million by 2030, growing at a CAGR of 7.61% during the forecast period (2024-2030).

Key Highlights

- Hybrids is the Largest Breeding Technology: The major companies are developing new hybrids and the adoption of hybrids is high due to disease-resistant, increased shelf life, high yield, and wider adaptability.
- United States is the Largest Country: The United States has a high adoption rate of hybrid seeds, 10th largest exporter of tomatoes to other countries, and has new technology innovations available in the country.
- Open Pollinated Varieties & Hybrid Derivatives is the Fastest-growing Breeding Technology: These seeds are used by growers as they are cost-effective and demand from the local markets, and for fresh market utilization as tomatoes produced have good taste and color.
- Canada is the Fastest-growing Country: The demand for tomato seeds increased because of the increase in the consumption of tomatoes, demand by processing industries, and increase in protected cultivation.

North America Tomato Seed Market Trends

Hybrids is the largest Breeding Technology

- North America held the second-largest tomato seed market in the world, with 21.4% of the global seed market in terms of value

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in 2021. The United States and Mexico are the largest tomato-producing countries in the region.

- In North America, the United States is the larger consumer in the region. The tomato hybrid seed consumption in the country increased to 26.1% during 2016-2021.
- Hybrid tomatoes accounted for 89.6% of the North American tomato seed market, and open-pollinated varieties and hybrid derivatives accounted for 10.4% of the North American tomato seed market in 2021.
- Hybrids accounted for more acreage due to the characteristics that hybrids provide, which include disease resistance, increased shelf life, wider adaptability, high yield, strong stem, crack resistance, and high vigor, which fetch more prices for the growers.
- The major companies are developing new hybrids with disease-resistant traits, increasing shelf life, wider adaptability, high yield, strong stem, crack resistance, and high vigor. These are the traits popular among the farmers, which fetch higher prices in the market.
- Except for Canada, North American countries are growing at a higher rate in terms of open-pollinated varieties and hybrid derivatives usage in tomato production because of Canada's climatic and environmental conditions. They had to use more inputs and required high maintenance to cultivate using OPV seeds.
- However, the increased protected cultivation practices in the region, the increase in the processing industry usage of tomatoes, and the increased organic farming acreage are major drivers for both hybrids and OPVs in the region.

United States is the largest Country

- Tomato is the most important vegetable crop, grown extensively in tropical and subtropical climates. It is the most widely grown and consumed vegetable in the region.
- In 2021, the United States accounted for 11.2% of the global tomato seed market due to the high usage of hybrid seeds, export to other countries, and new technology innovations in the country.
- The cultivated area for tomatoes decreased from 2016 to 2021 due to an increase in the use of hybrid seeds, and it increased the yield from 2016 to 2021 by about 21%.
- For instance, in 2021, Bowery Farming in the United States received a grant of USD 300 million, and it announced the use of the funds to accelerate the expansion of indoor farms and introduce vegetables, including hydroponic tomatoes, to the US market.
- In Mexico, tomatoes accounted for 50.1% of the total crops grown under protected cultivation in Mexico in 2021. Thus, the demand for hybrid seeds for protected cultivation is expected to increase in the forecast period.
- Canada is growing the fastest, at a CAGR of 6.9% from 2022-2028, because of new technologies developed by Canadian agriculture universities, the use of hybrid seeds, and export to major countries such as the United States, Japan, and China.
- In 2021, Canada accounted for a 7.8% share of the North America tomato seed market and tomatoes had a 10.8% share of the country's vegetable seeds market because of the high consumption in different ways, such as tomato ketchup and tomato puree. Therefore, the demand for tomato seeds is expected to increase.
- Therefore, there is an expected increase in demand for tomato seeds in the region due to the increase in production and yield in the region.

North America Tomato Seed Industry Overview

The North America Tomato Seed Market is fairly consolidated, with the top five companies occupying 80.09%. 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).

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- The market estimate (ME) sheet in Excel format
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