

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

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Report description:

The North America Vegetable Seed Market size is estimated at USD 1.94 billion in 2024, and is expected to reach USD 2.64 billion by 2030, growing at a CAGR of 5.27% during the forecast period (2024-2030).

Key Highlights

- Cucurbits is the Largest Crop Family. The expansion of cultivation area and the increasing consumption of cucurbit due to increasing health awareness such as lowering of cholesterol and anti-oxidant effects.
- United States is the Largest Country. The subsidies provided by government for organic cultivation, adoption of advanced technologies, and increased crop returns helped the country to be a leader 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.
- Mexico is the Fastest-growing Country. Mexico is the leading producer of vegetables using protected cultivation, favorable weather conditions, and favorable prices of vegetables led to increase in the cultivation.

North America Vegetable Seed Market Trends

Hybrids is the largest Breeding Technology

- Hybrids are the fastest-growing segment in the region, accounting for 93.3% of overall vegetables cultivated in the region in 2022. The usage of hybrids increased due to their high yield and resistance to insects and diseases.

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- The total market share of the North American vegetable seed market out of the global vegetable seed market was 24.5% in 2021, which is expected to increase as the hybrids adaptation rate is high and new technologies are adopted in cultivation.
- With the rising demand for vegetables and decreasing arable land, hybrids are playing a significant role in increasing production. In 2021, North America held market volume by a total of 9.5 thousand metric ton of hybrid vegetable seeds, an increase of 20.3% compared to 2016, i.e., 8.1 thousand metric ton.?
- In North America, the United States held a large market value in hybrid vegetables, compared to other countries, with 67.9% in 2021. California, North Dakota, Idaho, Michigan, Minnesota, Washington, and Wisconsin are the major vegetable markets in the region.?
- The market share of open-pollinated varieties and hybrid derivatives in the North American overall vegetable seed market in 2021 was 6.7%. Brassicas held the largest market share, accounting for 25.7% of the total open-pollinated varieties and hybrid derivatives vegetable seed market in 2021. ?
- With the increase in the protected cultivation acreage, the demand for hybrids is growing. An increase in the consumption of vegetables, an increase in the processing and food industries' demand for fresh vegetables, and growing supply chain and logistics efficiency are expected to drive the vegetable seed market at a CAGR of 5.2% during the forecast period.

United States is the largest Country

- North America is among the leading vegetable-producing regions in the world, and the seed market was valued at approximately USD 1,816.9 million in 2021.
- In 2021, the United States had the largest seed market in the region, with vegetables growing in an area of 1.6 million ha, which decreased by 11.0% compared to the acreage of 2016. The decrease in the area is because of the increase in protected cultivation, and the farmers are able to meet the production demand with the use of high-yielding hybrid varieties.
- The United States accounted for 66.7% of the total vegetable seed market in North America in terms of value in 2021. Hybrids held the major share, accounting for 94.9% of the country's vegetable seed market in 2021. The high-yielding capacity of hybrids is driving the market.
- Mexico is the second-largest producer of vegetables, followed by Canada, accounting for 5.3% and 2.1% of the global vegetable seed market, respectively, in terms of value in 2021.
- Greenhouse cultivation is increasing consistently in the region because of increased government support and net returns with respect to low input cost and high productivity. Currently, the total protected cultivation is only around 2.2% of the total North American vegetable production.
- Crops like tomato, chili, and cucumber and gherkins are highly cultivated under protection in this region. Together, they occupied 97.3% of the region's open-pollinated seed market in 2021.
- The increase in per capita consumption, the increase in the hybridization by seed companies, and the Free Trade Agreement facilitating imports and exports between North American countries are expected to boost the seed market on a large scale in the forecast period.

North America Vegetable Seed Industry Overview

The North America Vegetable Seed Market is fairly consolidated, with the top five companies occupying 65.32%. 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:

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

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