

Pakistan Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

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Report description:

The Pakistan Seed Market size is estimated at USD 413.31 million in 2024, and is expected to reach USD 532.54 million by 2029, growing at a CAGR of 5.20% during the forecast period (2024-2029).

Key Highlights

- An increase in hybrid seed penetration is anticipated in multiple crops to address the rising food demand-supply mismatch in the country. Due to a decrease in arable land and a constant increase in population, the per capita arable land has declined. These factors, along with poor crop productivity, are likely to create pressure on the food supply in the country.
- The seed sector in Pakistan is characterized by agitation between archaic regulations and entrepreneurs in the growing market. All critical aspects of the system, such as licensing of seed producers, variety release procedures, access to public germplasm, quality control, intellectual property rights (IPRs), imports, and exports, are all governed by laws and rules framed several decades ago for a system dominated by public-sector enterprises. However, seed law amendments and the introduction of new laws to propagate biotech seeds can be promising steps toward formalizing the informal sector.
- In Pakistan, hybrid seed penetration is the highest in cotton, with hybridization almost reaching saturation as Bt cotton is sown over 95% of the cotton-producing area in the country. Hybridization in corn, paddy, and vegetables is increasingly gaining momentum and is estimated to drive the sector growth during the forecast period.
- Pakistan is a member of the World Trade Organisation (WTO) and is obligated to provide a mechanism to protect plant varieties. Pakistan is also a member of the International Treaty on Plant Genetic Resources for Food and Agriculture, which recognizes the right of farmers to save, use, exchange, and sell farm-saved seeds. Accordingly, Pakistan adopted the Plant Breeders' Rights Act to encourage the development of new plant varieties and protect the rights of breeders of such types, thus attracting local and foreign investment in research, technology, and development, in the seed industry. The act also respects the right of farmers to save, use, exchange, and sell farm-saved seeds, a practice that is the backbone of the agricultural system and the main channel

through which farmers access sources in most developing countries.

Pakistan Seed Market Trends

Decrease In Arable Land

The arable land in Pakistan was reduced from 2017 to 2020. The total arable land in Pakistan in 2017 was around 31,210,000 hectares condensed and reached 30,930,000 hectares in 2020. As a result of population expansion and a steady land degradation rate, the per capita land is anticipated to decrease in the future. The decreasing per capita availability of arable land is a significant concern for agricultural production in Pakistan. However, it is considered to be a driver for the seed industry.

The need to increase production from the fluctuating arable land to get higher returns can be met using HYVs and hybrid varieties. This trend encourages farmers to shift their focus from conventional seed sources to packaged seeds, which promise better returns. Hence, to meet the increasing food demand, the production of crops, such as cereals and pulses, needs to increase despite the limited availability of arable land. This has propelled the farmers in the country to adopt high-yielding varieties to produce more within the little available land. This, in turn, drives the growth of the market.

The fluctuating arable land encourages corporations and farmers to pool their resources for contract farming, especially potato and maize crops in Pakistan. The increasing contract farming practices help converge a large set of farmers to one point for seed selection. This maintains uniformity in the produce, thereby assisting the seller in obtaining sustainable demand and augmenting the bulk sale of seeds.

Open Pollinated Seeds Dominates the Market

In 2020, the Maize and Millets Research Institute (MMRI) in Yousafwala, one of the leading maize research institutes in Pakistan, released four open-pollinated varieties (OPVs) sourced from CIMMYT. The varieties, named Gohar-19, CIMMYT-PAK, Sahiwal Gold, and Pop-1, are the new additions to Pakistan's maize variety list. These varieties are of short duration, and can be harvested quickly to rotate land for the next crop. They can also be grown in the main and off-season, which makes them suitable for many different cropping systems.

According to a study by the International Maize and Wheat Improvement Center (CIMMYT), Pakistan in 2020, maize is considered the third most important cereal crop in the country, and its area is increasing at a steady rate by substituting various crops in its non-core area. Around 30% of the land cultivating maize is used for hybrids, while 70% cultivates open-pollinated varieties (OPVs). The farmers in the country, are poor and they prefer to use open-pollinated varieties over hybrid varieties due to the high prices of hybrid varieties. This is further driving the growth of the market.

The Variety Evaluation Committee (VEC) on Rice of Pakistan Agriculture Research Council (PARC) in 2020, introduced an open-pollinated rice variety for commercial cultivation across the rice-growing areas of the country to promote the crop output. Furthermore, in 2020 the Maize & Millets Research Institute introduced Pop-1, the first approved popcorn variety recommended for general cultivation. This variety was found to be moderately resistant to stalk rot caused by *Fusarium moniliform* during two seasons and shows resistance against the disease. The approval of this variety is also aiding the country in reducing imports.

In recent years, the trend of home production of vegetables is increasing throughout the country. Though the number of garden supply stores has multiplied in the country, the gardeners in the country are finding it difficult to source seeds. Therefore, they are opting for open-pollinated seeds areas that are more readily available than hybrid seeds. This is further augmenting the growth of the market.

Pakistan Seed Industry Overview

The Pakistan Seed Market is fragmented, with numerous local and international players. Bayer Crop Science Pakistan (Pvt.) Ltd., ICI Pakistan (Pvt.) Ltd, Four Brothers Seeds Corporation, Jullundur Private Limited, and Allahdin Group are some major players operating in the market. The players are investing in new products and improvisation of products, partnerships, expansions, and acquisitions for business expansions.

Additional Benefits:

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

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