

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

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Report description:

The Rice Seed Treatment Market size is estimated at USD 37.87 million in 2024, and is expected to reach USD 46.29 million by 2029, growing at a CAGR of 4.10% during the forecast period (2024-2029).

In the initial days of the outbreak, the agriculture sectors were partially affected by the COVID-19 pandemic, but agricultural chemicals and fertilizers, which are import-dependent, saw supply disruptions for longer. However, preventive measures and initiatives were taken to ensure supply.

China being the major producer of agricultural chemicals, disruptions to production would have a ripple effect on North American supplies of crop protection inputs, including seed treatment. However, although produced overseas, the active chemical ingredients of a pesticide are formulated in North America to produce the end product, including seed treatment. As per the Canadian Association of Agri-Retailers, most products are generally committed in advance in a year or two. Therefore, the Canadian industry was well-supplied with the inputs for the 2020 growing season.

Seed treatment plays an important role in protecting the seeds and seedlings from seed and soil-borne diseases and insect pests affecting crop emergence and growth. The adoption of this practice by rice farmers across the globe requires effective extension strategies to make the appropriate chemical pesticides/bio-pesticides and equipment available to the farmers, besides making them aware of seed treatment, post-treatment handling of seeds, and planting materials.

In application type, the biological segment is anticipated to witness the fastest growth. With the increasing concern for the environment and product launches by major market players, the biological seed treatment is anticipated to grow at a faster rate during the forecast period.

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By application technique, seed dressing was the largest segment in 2020. According to the study, seed dressing is found to be the most convenient and cost-effective seed treatment technique. For instance, in Asia-Pacific (the largest market), where most farmers are small-scale farmers with low income, this technique is found to be effective. Hence, the market is projected to grow in the coming years.

The developments in the crop protection industry, increasing government support, and the increasing demand and adoption of high-quality seeds are some of the factors driving the global rice seed treatment market during the forecast period.

Rice Seed Treatment Market Trends

Increasing Demand for and Adoption of High-quality Seeds

Farmers are increasingly acknowledging seed treatment as a mode to protect high investments made on good quality seeds. Owing to the increasing demand for high-quality seeds with desirable agronomic traits, the cost of seeds is increasing. Both companies and farmers are ready to spend extra on seed treatment solutions to save costly high-quality seeds.

The introduction of GM seeds added high value to seeds, with the cost of seeds being high and sometimes being twice as much as that of non-GM seeds. Earlier, a growth of 85% was expected by farmers as some seeds would rot or be destroyed by insects. With changing trends and 100% seed emergence expectation by growers even in unfavorable conditions, seed treatment has become a necessity. Top players in the market are constantly focusing on developing superior quality seeds through modern breeding techniques, thereby increasing the cost of the seeds.

African countries do not produce enough rice and are reliant on imports. One such country is Sierra Leone. Hence, to become self-sufficient, the country's government is adopting a few strategies. A promising solution is the dissemination of high-yielding rice varieties, such as the New Rice of Africa (NERICA), which have become known as the miracle crop for African rice farmers because they combine the genetic qualities of Asian rice (high yielding) and African rice (high resistance to drought and disease). However, current estimates suggest only 2% of farmers in the country use NERICAs. This is due to the cost of improved varieties that cost 40-100% more than traditional ones, representing a significant barrier to adoption among poor farmers. Hence, due to the high cost of these hybrid varieties, there is an opportunity for paddy farmers to use treated seeds at an affordable cost. This, in turn, is expected to lead to the positive growth of the rice seed treatment market in the coming years.

Asia-Pacific Dominates the Market

As rice is the staple food and most prominent crop grown, the Asia-Pacific region was observed to be the largest and fastest-growing region with the largest share in 2020. In the region, China is the largest and fastest-growing country, followed by India and Japan.

According to the Ministry of Agriculture of China, the rice seed industry is actively seeking differentiated commercial varieties and market positioning to make up for the shortage of high-yield and low-resistance varieties (especially rice blasts). China is also focusing on enhancing the value of seeds. This is leading to an increase in the number of hybrid rice varieties in the country. In 2018, an increase of 2.55% was witnessed in the hybrid rice seed production compared to the value registered in 2017. This is expected to impact the seed treatment market as well positively. Also, India is the second-largest producer and largest exporter of rice across the world. In India, rice is grown under widely varying conditions of altitude and climate. The rising production of rice in India, owing to the favorable climate and practices, is boosting the demand for rice seed treatment chemicals in the country. Overall, the rice seed treatment market in the region is expected to grow steadily in the coming years due to the rising food demand and increasing research and development to introduce new innovative products in the market.

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Rice Seed Treatment Industry Overview

The global rice seed treatment market is highly consolidated, with major players (top seven players) holding a major share while others accounted for a minor share in 2021. Bayer AG, Syngenta International AG, UPL Limited, Adama Agricultural Solutions Ltd, Corteva Agriscience, Nufarm Ltd, and Croda International PLC (Incotec) are some of the prominent players operating in the market. These players are focusing on product launches to expand their presence at the global level.

Additional Benefits:

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

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