

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

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Report description:

The South America Forage Seed Market size is estimated at USD 541.86 million in 2024, and is expected to reach USD 695.22 million by 2030, growing at a CAGR of 4.24% during the forecast period (2024-2030).

Key Highlights

- Alfalfa is the Largest Crop: Alfalfa is one of the major forage having high demand in the region by dairy farmers for animal feed due to its high nutritional value, short duration, and high palatability.
- Brazil is the Largest Country: The high share of Brazil is due to the increasing cattle population in the country, government support to the livestock farmers, and higher seed replacement rate.
- Alfalfa is the Fastest-growing Crop: The high demand for alfalfa is due to its high protein content and it can be used as fresh fodder as well as hay. Also, it can be harvested 10-12 times per crop season.
- Argentina is the Fastest-growing Country: Argentina is the largest producer of Alfalfa in South America due to the high demand for alfalfa as hay by the cattle farmers and high profitability for growers.

South America Forage Seed Market Trends

Hybrids is the largest Breeding Technology

- In South America, the total area under the cultivation of forage crops in 2021 was 9.02 million ha, which was around 7.3 million ha in 2016. It is an increase of almost 24% from 2016 to 2021, which is due to an increase in the demand for animal feed.

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- In 2021, South America had a market share of 9.3% of the global forage seed market, which is due to the increase in the production for export to neighboring countries as a raw material for feed production.
- Brazil is the largest user of hybrid seeds for forage cultivation, which accounts for 70.5% of the total hybrid forage production area in South America in 2021. However, transgenic hybrid penetration is more in Argentina.
- Some cattlemen have a preference for forage crops produced by using non-transgenic hybrid seeds because it is easily digestible by the cattle and the productivity of corn is high, and corn silage is being used for corn ethanol production in Brazil, which leads to becoming the fastest growing crop among hybrid forages.
- Among the South American countries, the share of forage crops cultivated using open-pollinated varieties and hybrid derivatives seeds is approximately 26.1% of the total forage seed market value. It is largely contributed by native grasses of *Braccharia* species.
- The *Braccharia* species are grown either wild or as cover crops or rotation crops for extra for farmers between two seasons, which helps in nutrient cycling. Therefore, OPVs are growing in the forecast period owing to those factors. However, commercial cultivation is done by hybrids and GM varieties that require lesser inputs and more productivity, which will be growing at a CAGR of 2.4% in South America in the forecast period from 2022 to 2028.

Brazil is the largest Country

- Brazil is the largest country in the South American forage seed market because of the increase in the demand for beef production, the increase in livestock, and government support programs for the cultivation of forage crops.
- According to USDA, beef production is expected to grow from 2020 to 2028 in Brazil due to the increasing cattle availability and improved margins for slaughterhouses. According to research by DSM consulting firm, the number of livestock animals in Brazil was 6.19 million in 2020, an increase of 6% from 2019. The increasing livestock will increase the demand for meat in the country, and it will help increase the production of forage crops in Brazil.
- Argentina is anticipated to register a CAGR of 3.2% during the forecast period because it is globally the second-highest consumer of beef, with yearly consumption of 55 kg per person. In 2019, about 400 slaughter plants were in Argentina. Over the past several years, industry investments have grown to increase slaughter capacity due to increasing consumption. Therefore, the demand for feed will increase and help in the growth of the market in South America during the forecast period.
- Rest of South America has the smallest share in the region because of the low-quality seeds available in these countries, but the Lianos of Colombia and Venezuela are major commercial centers for livestock in South America. Therefore, the demand for seeds is anticipated to grow during the forecast period.
- Therefore, government support in funding the cultivation of forage crops and an increase in livestock will help in the growth of the market during the forecast period.

South America Forage Seed Industry Overview

The South America Forage Seed Market is fragmented, with the top five companies occupying 28.37%. The major players in this market are Advanta Seeds - UPL, Bayer AG, DLF, Peman and Royal Barenbrug Group (sorted alphabetically).

Additional Benefits:

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

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