

Southeast Asia Vegetable Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030

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Report description:

The Southeast Asia Vegetable Seed Market size is estimated at USD 531.95 million in 2024, and is expected to reach USD 708.31 million by 2030, growing at a CAGR of 4.89% during the forecast period (2024-2030).

Key Highlights

- Solanaceae is the Largest Crop Family: The largest share of the Solanaceae segment is due to the increased area under cultivation of tomato, chili, and eggplant in the region with the high seed replacement rate.
- Indonesia is the Largest Country: The largest share of Indonesia is due to the comparatively higher area under vegetable crops in the region followed by high usage of hybrids and a high seed replacement rate.
- Cucurbits is the Fastest-growing Crop Family: The fastest growth of the segment is due to an increase in the consumption of salad, short duration of the crops, high export demand, and suitable for protected cultivation.
- Myanmar is the Fastest-growing Country: It is the fastest growing segment due to an increase in the area under cultivation which is associated with the surge in the vegetable demand and higher adoption of hybrids.

Southeast Asia Vegetable Seed Market Trends

Hybrids is the largest Breeding Technology

- In Southeast Asian breeding technology, hybrid and open-pollinated varieties & hybrid derivatives are two major technologies in the region where hybrid seeds dominate the vegetable seed market by holding a share of 67.4% in 2021 in terms of value.

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- Hybrids have a higher share due to higher productivity, wider adaptability, and a high degree of resistance to biotic and abiotic stresses. For instance, in Solanaceae, hybrids give 50% more yield than conventional varieties. Hybrids' wider adaptability is mainly due to their high buffering capacity to environmental fluctuations.?
- In 2021, Thailand and Vietnam together accounted for a 33.9% share of the total open-pollinated varieties market in the region in terms of value. Open-pollinated varieties require fewer inputs, such as fertilizer and pesticides, and are less expensive and more affordable for low-income farmers. These factors boost the market in the region.???
- Similarly, in Southeast Asia, the open-pollinated varieties and hybrid derivatives held a market share of 32.6% in terms of value in the year 2021. The low share is mainly due to a preference for high-yielding and disease-resistant hybrids.???
- In 2021, the hybrid seed adoption rate was higher than open-pollinated seed varieties in Vietnam. The hybrids accounted for 67.5% of the market share in terms of value because of the advantages such as high yield, low seed rate, disease resistance, and early maturity. Therefore, the demand for hybrid seeds is expected to increase in the country during the forecast period.??
- Therefore, with increasing food demand, and the implementation of commercial hybrid varieties, hybrid breeding technology will dominate the market in the forecast period.??

Indonesia is the largest Country

- In Southeast Asia, Indonesia dominates the vegetable seed market by accounting for 41.1% of the market share in terms of value, followed by Thailand, Vietnam, Myanmar, and the Philippines.
- The Seed Association of Thailand (SAT) plays a significant role in developing the Thai seed industry. Enhancing the seed export potential (mainly for vegetables) and providing Thai farmers with quality seeds are the main strategies that have been adopted to achieve this aim. ?Therefore, it will help in increasing the commercial seeds in Thailand and increasing the demand for seeds during the forecasted period.
- In 2021, the Philippines' solanaceae seed segment is the largest segment accounting for 28.1% share value in the country's vegetable seed market. In 2021, to help increase the commercialization and production of vegetables, the Department of Agriculture in the Philippines portions of ancestral lands were being transformed into food production. The National Commission on Indigenous Peoples is encouraging the growth of Indigenous Peoples' vegetables, such as pumpkin and squash. ?
- Disease-resistant traits are increasingly being adopted in the region for vegetables because of the significant yield loss caused by foliar diseases such as downy mildew, white speck, gummy stem blight, and anthracnose. Therefore, the seed market for vegetables is growing in the region as a result of the use of enhanced varieties with high-yielding potential.
- Therefore, factors such as the govt. measures, increasing production and population, growing awareness about the health benefits of raw vegetables, and the demand from the processing industry are anticipated to boost the vegetable seeds segment in the forecast period. ?

Southeast Asia Vegetable Seed Industry Overview

The Southeast Asia Vegetable Seed Market is fragmented, with the top five companies occupying 20.87%. The major players in this market are Bayer AG, East-West Seed, Groupe Limagrain, Rijk Zwaan Zaadteelt en Zaadhandel B.V. and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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