

Sunflower Seed (seed For Sowing) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Sunflower Seed Market size is estimated at USD 1.09 billion in 2024, and is expected to reach USD 1.52 billion by 2030, growing at a CAGR of 5.70% during the forecast period (2024-2030).

Key Highlights

- Hybrids is the Largest Breeding Technology: There was an increase in the demand for hybrid seeds due to an increase in the cultivation area under hybrid seeds and the availability of improved hybrid seed varieties.
- Argentina is the Largest Country: The driving factors for Argentina to cultivate sunflowers are the increase in demand after the Ukraine-Russia war, high ROI, and the availability of advanced traits.
- Hybrids is the Fastest-growing Breeding Technology: The major companies are developing new hybrids and the adoption of hybrids is high due to drought tolerance, disease-resistant, high yield, and wider adaptability.
- Indonesia is the Fastest-growing Country: It is to witness growth due to an increase in the area cultivated and the government is encouraging the growers to grow more sunflowers to lower its dependence on imports.

Sunflower Seeds Market Trends

Hybrids is the largest Breeding Technology

- In 2021, hybrid seeds had more share than open-pollinated seed varieties because hybrid seeds are drought resistant, have wider adaptability to different regions and weather conditions, and high-quality oil crops are produced by using hybrid seeds.

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- Globally, in 2021, the non-transgenic hybrid sunflower seed market was about 86.6% of the sunflower seed market. Transgenic crops are banned in Europe, and the awareness among people about the benefits of consuming non-GMO food is increasing.
- Ukraine was one of the largest producers of sunflowers in the world in 2021, accounting for 4.2% of the global sunflower seed market.
- In most regions, open-pollinated seed varieties are used less compared to hybrid seed varieties because open-pollinated seed varieties are not resistant to diseases and can be attacked easily by both biotic and abiotic factors. Therefore, to minimize crop loss due to weeds and insects, growers use hybrid seed traits that have characteristics such as disease tolerance and insect resistance.
- Open-pollinated seed varieties are anticipated to grow at a CAGR of 3.4% during the forecasted period owing to a steady increase in sowing under OPVs because small-scale growers prefer to use open-pollinated seed varieties as they are less expensive than hybrid seeds and easily adapt to local conditions.
- Therefore, the benefits, such as higher yield and resistance to diseases, will help drive the hybrid seed segment, but open-pollinated seed varieties will be used by small-scale farmers for higher profit by minimizing crop input costs.

South America is the largest Region

- In 2021, Europe contributed a major share, accounting for about 33.2% of the sunflower seed market, with a CAGR of 5.1% in the forecast period. The main reason for holding a major share is the rising penetration of commercial seeds as usage of hybrid varieties in the region increased, which accounted for 98.6% in 2021.
- Among all other countries in Europe, Russia has the largest sunflower seed market in the region in terms of value, i.e., USD 74.5 million, with approximately 23.2% market share in the region. This is due to domestic demand from processing industries. The country was the second-largest sunflower oil exporter in 2021, with a 7.6% share of the global sunflower oil supply.
- In North America, the sunflower seed segment is a minor segment in oilseed, accounting for a market share of 2.0% in 2021. The United States is dominating the North American oilseed segment.
- The area in North America for cultivating sunflowers is expected to increase from 572,363 hectares in 2017 to 592,884 hectares in 2028 because of an increase in the demand for cooking oil, livestock feed, and bakery products.
- The total sunflower seed market of South America in 2021 accounted for 35.7%. It was the largest sunflower seed market in the world. It is expected to increase by 30.7% by 2028, owing to an increase in the demand from the oil industries in the domestic market and international markets. Farmers are shifting to sunflower cultivation from other oilseeds because of the high-profit margin from it.

Sunflower Seeds Industry Overview

The Sunflower Seed (seed For Sowing) Market is moderately consolidated, with the top five companies occupying 42.78%. The major players in this market are Corteva Agriscience, Euralis Semences, KWS SAAT SE & Co. KGaA, Land O'Lakes, Inc. and Nufarm (sorted alphabetically).

Additional Benefits:

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

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