

## **Vegetable Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030**

Market Report | 2024-02-17 | 784 pages | Mordor Intelligence

### **AVAILABLE LICENSES:**

- Single User License \$4750.00
- Team License (1-7 Users) \$5250.00
- Site License \$6500.00
- Corporate License \$8750.00

### **Report description:**

The Vegetable Seed Market size is estimated at USD 8.58 billion in 2024, and is expected to reach USD 11.94 billion by 2030, growing at a CAGR of 5.66% during the forecast period (2024-2030).

#### Key Highlights

- Cucurbits is the Largest Crop Family. The fastest growth is due to an increase in the consumption demand, short duration of cucurbit crops, suitable for protected cultivation, and high export demand.
- United States is the Largest Country. It is due to the adoption of advanced technologies, the increased area under vegetables, and the government subsidies for organic cultivation helped to become the leader.
- Roots & Bulbs is the Fastest-growing Crop Family. The fastest growth of the roots and bulbs is associated with the development of true seeds in case of potato and garlic, which is the emerging market in the future.
- Mexico is the Fastest-growing Country. Mexico is the leading producer of vegetables using protected cultivation, favorable weather conditions, and favorable prices of vegetables led to increase in the cultivation.

#### Vegetable Seeds Market Trends

Hybrids is the largest Breeding Technology

- Globally, hybrid varieties dominated the market, with a share of 74.4% of the total vegetable seed market in 2021. Open-pollinated vegetable seeds hold a share of 25.6%. An increase in the need to increase vegetable production and yield is

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

driving the African hybrid vegetable seed market.

- In 2021, in terms of the value of hybrid seeds, the percentage of cucurbits and unclassified vegetables is high, accounting for over 25.8% and 22.9% of the market value of global hybrid vegetable seeds. In individual vegetables, tomato, cucumber & gherkin, and pumpkin & squash are the three most significant vegetable crops, accounting for 13.0%, 12.2%, and 9.7% of the market for hybrid vegetable seeds, respectively.
- Asia-Pacific was the major region in the world using hybrids in the cultivation of vegetables, accounting for 36.5% of the global hybrid vegetable seed market in terms of value in 2021. China and India are the leading countries in the region, holding about 56.3% of the Asia-Pacific hybrid vegetable market.
- In 2021, unclassified vegetables and solanaceous accounted for about 30.1% and 25% of the market value for the open-pollinated vegetable seeds market in terms of value. Globally, tomato (14.9%), pumpkin & squash (6.5%), cucumber & gherkin (6.3%), lettuce (6.1%), and other roots such as artichokes and cassava accounted major share in the global open-pollinated varieties market.
- Asia-Pacific was the largest region in the world under the open-pollinated varieties, accounting for 44.5% of the global OPV vegetable seed market, followed by Africa and Europe, accounting for 18.5% and 15.2%, respectively, in 2021. Higher input costs for hybrids and the high affordability of open-pollinated varieties are the factors driving the usage of OPV in vegetable cultivation.

#### Asia-Pacific is the largest Region

- In 2022, Asia-Pacific is the largest vegetable producer in the world. It held 36.2% of the global vegetable seed market in terms of value. China and India are the major producers of vegetables, accounting for 32.3% and 23.5% of the respective vegetable seeds market.
- Asia-Pacific has the largest tomato seed market in the world, with 47% of the global tomato seed market in terms of value, and the second largest region in the cucurbits seed segment, accounting for 37.6% of the global cucurbits seed market. The total acreage of tomatoes in Asia-Pacific was 2.7 million ha in 2021.
- North America is the second largest vegetable producer in the world. It accounted for 26.4% of the global vegetable seed market in 2021. Cucurbits were produced largely in the region with a share of 37.1%, followed by brassicas (24.3%), unclassified vegetables (16.1%), and Solanaceae (13.1).
- North America is the largest producer of cucumber and gherkin, accounting for 52% of the total global cucumber and gherkin share value. The United States alone held a 45% share in the global cucumber and gherkin seed market.
- Europe is the third-largest vegetable producer in the world. The vegetable's share in the respective global vegetable seed market was 22% in the year 2021. The major vegetables grown were potato, onion, carrot, spinach, peas, and asparagus.
- In Africa, the major growing vegetable family is unclassified vegetables, accounting for 17% of the global unclassified vegetable seed market and 30.3% of the African vegetable seed market.
- The demand for vegetables is growing rapidly as people become more aware of the importance of eating a healthy diet. The vegetable seed market is estimated to increase by 38% in 2028.

#### Vegetable Seeds Industry Overview

The Vegetable Seed Market is moderately consolidated, with the top five companies occupying 41.90%. The major players in this market are BASF SE, Bayer AG, Groupe Limagrain, Rijk Zwaan Zaadteelt en Zaadhandel B.V. and Sakata Seeds Corporation (sorted alphabetically).

#### Additional Benefits:

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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

## **Table of Contents:**

### 1 EXECUTIVE SUMMARY & KEY FINDINGS

### 2 REPORT OFFERS

### 3 INTRODUCTION

#### 3.1 Study Assumptions & Market Definition

#### 3.2 Scope of the Study

#### 3.3 Research Methodology

### 4 KEY INDUSTRY TRENDS

#### 4.1 Area Under Cultivation

#### 4.2 Most Popular Traits

#### 4.3 Regulatory Framework

#### 4.4 Value Chain & Distribution Channel Analysis

### 5 MARKET SEGMENTATION

#### 5.1 Breeding Technology

##### 5.1.1 Hybrids

##### 5.1.2 Open Pollinated Varieties & Hybrid Derivatives

#### 5.2 Cultivation Mechanism

##### 5.2.1 Open Field

##### 5.2.2 Protected Cultivation

#### 5.3 Crop Family

##### 5.3.1 Brassicas

###### 5.3.1.1 Cabbage

###### 5.3.1.2 Carrot

###### 5.3.1.3 Cauliflower & Broccoli

###### 5.3.1.4 Other Brassicas

##### 5.3.2 Cucurbits

###### 5.3.2.1 Cucumber & Gherkin

###### 5.3.2.2 Pumpkin & Squash

###### 5.3.2.3 Other Cucurbits

##### 5.3.3 Roots & Bulbs

###### 5.3.3.1 Garlic

###### 5.3.3.2 Onion

###### 5.3.3.3 Potato

###### 5.3.3.4 Other Roots & Bulbs

##### 5.3.4 Solanaceae

###### 5.3.4.1 Chilli

###### 5.3.4.2 Eggplant

###### 5.3.4.3 Tomato

###### 5.3.4.4 Other Solanaceae

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.3.5 Unclassified Vegetables
  - 5.3.5.1 Asparagus
  - 5.3.5.2 Lettuce
  - 5.3.5.3 Okra
  - 5.3.5.4 Peas
  - 5.3.5.5 Spinach
  - 5.3.5.6 Other Unclassified Vegetables
- 5.4 Region
  - 5.4.1 Africa
    - 5.4.1.1 By Breeding Technology
    - 5.4.1.2 By Cultivation Mechanism
    - 5.4.1.3 By Crop
    - 5.4.1.4 By Country
      - 5.4.1.4.1 Egypt
      - 5.4.1.4.2 Ethiopia
      - 5.4.1.4.3 Ghana
      - 5.4.1.4.4 Kenya
      - 5.4.1.4.5 Nigeria
      - 5.4.1.4.6 South Africa
      - 5.4.1.4.7 Tanzania
      - 5.4.1.4.8 Rest of Africa
  - 5.4.2 Asia-Pacific
    - 5.4.2.1 By Breeding Technology
    - 5.4.2.2 By Cultivation Mechanism
    - 5.4.2.3 By Crop
    - 5.4.2.4 By Country
      - 5.4.2.4.1 Australia
      - 5.4.2.4.2 Bangladesh
      - 5.4.2.4.3 China
      - 5.4.2.4.4 India
      - 5.4.2.4.5 Indonesia
      - 5.4.2.4.6 Japan
      - 5.4.2.4.7 Myanmar
      - 5.4.2.4.8 Pakistan
      - 5.4.2.4.9 Philippines
      - 5.4.2.4.10 Thailand
      - 5.4.2.4.11 Vietnam
      - 5.4.2.4.12 Rest of Asia-Pacific
  - 5.4.3 Europe
    - 5.4.3.1 By Breeding Technology
    - 5.4.3.2 By Cultivation Mechanism
    - 5.4.3.3 By Crop
    - 5.4.3.4 By Country
      - 5.4.3.4.1 France
      - 5.4.3.4.2 Germany
      - 5.4.3.4.3 Italy
      - 5.4.3.4.4 Netherlands

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

- 5.4.3.4.5 Poland
- 5.4.3.4.6 Romania
- 5.4.3.4.7 Russia
- 5.4.3.4.8 Spain
- 5.4.3.4.9 Turkey
- 5.4.3.4.10 Ukraine
- 5.4.3.4.11 United Kingdom
- 5.4.3.4.12 Rest of Europe
- 5.4.4 Middle East
  - 5.4.4.1 By Breeding Technology
  - 5.4.4.2 By Cultivation Mechanism
  - 5.4.4.3 By Crop
  - 5.4.4.4 By Country
    - 5.4.4.4.1 Iran
    - 5.4.4.4.2 Saudi Arabia
    - 5.4.4.4.3 Rest of Middle East
- 5.4.5 North America
  - 5.4.5.1 By Breeding Technology
  - 5.4.5.2 By Cultivation Mechanism
  - 5.4.5.3 By Crop
  - 5.4.5.4 By Country
    - 5.4.5.4.1 Canada
    - 5.4.5.4.2 Mexico
    - 5.4.5.4.3 United States
    - 5.4.5.4.4 Rest of North America
- 5.4.6 South America
  - 5.4.6.1 By Breeding Technology
  - 5.4.6.2 By Cultivation Mechanism
  - 5.4.6.3 By Crop
  - 5.4.6.4 By Country
    - 5.4.6.4.1 Argentina
    - 5.4.6.4.2 Brazil
    - 5.4.6.4.3 Rest of South America

## 6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
  - 6.4.1 Advanta Seeds - UPL
  - 6.4.2 BASF SE
  - 6.4.3 Bayer AG
  - 6.4.4 Bejo Zaden B.V.
  - 6.4.5 East-West Seed
  - 6.4.6 Enza Zaden
  - 6.4.7 Groupe Limagrain
  - 6.4.8 Rijk Zwaan Zaadteelt en Zaadhandel B.V.

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

6.4.9 Sakata Seeds Corporation

6.4.10 Takii and Co.,Ltd.

## 7 KEY STRATEGIC QUESTIONS FOR SEEDS CEOS

## 8 APPENDIX

### 8.1 Global Overview

#### 8.1.1 Overview

#### 8.1.2 Porter's Five Forces Framework

#### 8.1.3 Global Value Chain Analysis

#### 8.1.4 Global Market Size and DROs

### 8.2 Sources & References

### 8.3 List of Tables & Figures

### 8.4 Primary Insights

### 8.5 Data Pack

### 8.6 Glossary of Terms

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)

[www.scotts-international.com](http://www.scotts-international.com)

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

Market Report | 2024-02-17 | 784 pages | Mordor Intelligence

To place an Order with Scotts International:

- ☐ - Print this form
- ☐ - Complete the relevant blank fields and sign
- ☐ - Send as a scanned email to support@scotts-international.com

### ORDER FORM:

| Select license | License                  | Price     |
|----------------|--------------------------|-----------|
|                | Single User License      | \$4750.00 |
|                | Team License (1-7 Users) | \$5250.00 |
|                | Site License             | \$6500.00 |
|                | Corporate License        | \$8750.00 |
|                |                          | VAT       |
|                |                          | Total     |

\*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

\*\* VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

|               |                      |                               |                      |
|---------------|----------------------|-------------------------------|----------------------|
| Email*        | <input type="text"/> | Phone*                        | <input type="text"/> |
| First Name*   | <input type="text"/> | Last Name*                    | <input type="text"/> |
| Job title*    | <input type="text"/> |                               |                      |
| Company Name* | <input type="text"/> | EU Vat / Tax ID / NIP number* | <input type="text"/> |
| Address*      | <input type="text"/> | City*                         | <input type="text"/> |
| Zip Code*     | <input type="text"/> | Country*                      | <input type="text"/> |
|               |                      | Date                          | 2026-03-04           |
|               |                      | Signature                     |                      |

**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com



**Scotts International. EU Vat number: PL 6772247784**

tel. 0048 603 394 346 e-mail: [support@scotts-international.com](mailto:support@scotts-international.com)  
[www.scotts-international.com](http://www.scotts-international.com)