

Asia-Pacific Maize Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Asia-Pacific Maize Seed Market size is estimated at 7.41 billion USD in 2025, and is expected to reach 8.4 billion USD by 2030, growing at a CAGR of 2.52% during the forecast period (2025-2030).

Increased demand for high-quality seed varieties with resistance to diseases is driving the hybrid segment in Asia-Pacific

- In Asia-Pacific, hybrid seeds dominated the maize seed market by volume and value compared to open-pollinated varieties and hybrid derivatives. In 2022, hybrid maize seeds held a 91.3% share of the maize seed market. Hybrid seeds produced in the region for maize are resistant to viral diseases, bacterial diseases, wider adaptability, abiotic stress tolerance, and quality traits such as color, height, and the number of grains per cob.
- In the hybrid seed segment, non-transgenic maize seeds dominated the market, with a share of 83.3% in 2022. The cultivation of transgenic maize is not approved in many major maize-producing countries, except China, Vietnam, Japan, and Pakistan.
- The market declined by 2.8% from 2017 to 2022 due to the decrease in the cultivation area in major countries such as China and India, as well as unfavorable conditions during the same period. For instance, the area of cultivation for corn in China and India decreased by 0.6% and 2.6% during the historical period, respectively.
- In 2022, open-pollinated varieties and hybrid derivatives accounted for 8.7% of the maize market, less than hybrid seeds. China and India are the major cultivators of open-pollinated varieties, with a share of 67.8% in the same period, as they are not highly resistant to diseases such as leaf rot and bacterial diseases. Moreover, a significant constraint in cultivating corn using open-pollinated seed varieties is that they provide lower yields and lower productivity than hybrids.
- Due to major factors such as high yield, high resistance to diseases, and an increase in hybridization, the hybrid seed segment in the maize market is projected to register a CAGR of 2.5% during the forecast period.

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China dominated the Asia-Pacific maize seed market by accounting for an 82.7% share due to higher adoption of hybrids and a larger area under cultivation

- Maize is one of the major crops grown in Asia-Pacific. China leads the maize seed market in the region, accounting for 82.7% in 2022, followed by India (4.4%), Indonesia (3.7%), and the Philippines (2.2%).
- In China, there has been an increase in maize area in the major production provinces of Heilongjiang, Jilin, Henan, Inner Mongolia, Shandong, and Hebei in recent years. The acreage under maize cultivation was 20.9 million hectares in 2017, which increased to 24.1 million hectares in 2022. The production increased from 257 million metric ton to more than 272 million metric ton between 2017 and 2021. The increase in the adoption of maize compared to other competitive crops led to the rising demand for maize seeds in the country.
- India is the second major producer of maize in the region. In India, maize production accounted for 30.16 million metric ton in 2021, an increase of 16.44% compared to the previous year due to the high usage of commercial hybrids. The popular hybrids grown in the country are P-3501, NK-6240, P-3396, JVM-421, African Tall, Narmada Moti, and GM-6. ??
- Indonesia's maize production in 2021 was 12 million ton. Java, Sumatra, and Sulawesi are the major maize-growing areas in the country, which accounted for about 90% of production in 2022. Thus, the sales of these seeds are estimated to be higher in these areas.
- The other major maize-growing countries include the Philippines, Vietnam, Thailand, and Bangladesh due to the increasing demand from the food and feed industries. Therefore, the increase in the area, higher adoption of hybrids, and higher demand for maize from the processing industries drive the demand for maize seeds. Thus, the market is anticipated to register a CAGR of 2.5% during the forecast period.

Asia-Pacific Maize Seed Market Trends

Industrial applications, and the demand from animal feed and food processing industries are driving the maize cultivation

- Asia-Pacific is one of the major maize-producing regions globally, with a high demand in various processed food industries across its countries. In 2022, the region accounted for 67.6 million hectares of maize cultivation. The area under maize cultivation in the region observed an increase of 1.1% in 2022 compared to 2021. However, the acreage fluctuated during the historic period between 2017 and 2021. The fluctuation arose from China, India, and Indonesia, which are a few of the major maize-producing countries in the region.
- China occupied the major share of the area under maize cultivation, with 64.7% of the acreage in 2022. The favorable climatic conditions and the higher demand for maize as animal feed in the country have made it one of the major countries in the region. Moreover, the higher market prices for maize have driven its adoption by farmers in the country. Furthermore, India and Indonesia were the major countries after China concerning the area under maize cultivation, which accounted for 14.8% and 5.2% of the acreage in the region in 2022, respectively. The favorable market prices for maize from feed, food, and processing industries, such as ethanol plants, have driven the adoption of maize cultivation in these countries. Furthermore, the demand for ethanol in petrol blending is projected to surge from 173 crore liters in 2019-20 to 1,016 crore liters in 2025-26. Consequently, the overall demand for ethanol is set to rise from 684 crore liters in 2019-20 to 1,500 crore liters in 2025-26, with 740 crore liters being grain-based ethanol.
- Therefore, the increasing demand for corn for feed, human food, and industrial purposes is projected to drive the area under maize cultivation in the region significantly during the forecast period.

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Drought tolerance, disease resistance, and wider adaptability are the major traits farmers seek in the region

- Corn is an important crop cultivated by growers because it is a high-profit crop. Growers have a high preference for traits such as weed control, improved grain quality, early maturity, lodging tolerance, disease resistance, and adaptability to different regions and climate conditions. For instance, companies such as Bayer AG, BASF SE, and Syngenta provide traits that help increase productivity and resistance to diseases such as early rots and leaf diseases. These seed varieties are witnessing high demand because no other sprays or alternatives exist to resist the diseases. Furthermore, other major traits, such as color, height, and the number of grains per cob, are popular for high returns for growers.
- Globally, China is a major producer of corn. The demand for drought tolerance traits is increasing because there was low water availability due to drought in 2022. Therefore, the demand for drought-tolerant traits is expected to increase to meet the demand of drought-affected countries during the forecast period. Moreover, the growers are also adopting wider adaptability, abiotic stress tolerance, and insect-resistant traits due to changes in soil conditions and demand for protecting corn crops from insects such as pink stem borer, shoot fly, and spotted stem borer. For instance, India is one of the significant producers of corn in Asia-Pacific, where the crop is affected by pests and abiotic stress and grown in different agroecological zones.
- Factors such as low water due to climatic conditions, pests, and diseases affecting the growth of corn are expected to help in the introduction of new seed varieties and the growth of the market during the forecast period.

Asia-Pacific Maize Seed Industry Overview

The Asia-Pacific Maize Seed Market is fragmented, with the top five companies occupying 28.84%. The major players in this market are Advanta Seeds - UPL, Bayer AG, Beidahuang Kenfeng Seed Co. Ltd, Corteva Agriscience and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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