

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

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### **Report description:**

The Asia-Pacific Onion Seed Market size is estimated at 160.5 million USD in 2025, and is expected to reach 210.9 million USD by 2030, growing at a CAGR of 5.61% during the forecast period (2025-2030).

Hybrids dominate the onion seed market with increased demand and the development of hybrid varieties with high-yielding and disease-resistant characteristics

- In Asia-Pacific, hybrid seeds dominate the onion seed market in terms of volume and value compared to open-pollinated varieties and hybrid derivatives. In 2022, hybrid onion seeds accounted for 76.6% of the onion seed market. The market value of hybrids increased by more than 50% between 2017 and 2022 due to the increased availability of hybrid varieties with high-yielding characteristics.
- Hybrids with disease resistance and other quality traits are in high demand in the region as they prevent incurring yield losses and fetch good prices in the market. In India and China, varieties with disease resistance to purple blotch are widely cultivated. Major companies are developing onion seed varieties through research stations, agricultural universities, and coordinated projects in the region. For instance, in 2021, Bejo and De Groot en Slot launched the first downy mildew-resistant shallot from seed named Innovator.
- In 2022, Australia and India together accounted for 32.2%, mainly due to the increased domestic demand and higher adoption of hybrid seeds for the cultivation of onions.
- Onion is a self and cross-pollination crop and, thus, does not require much isolation distance for seed production. Therefore, seed production is easy and cost-effective in the case of open-pollinated varieties. The open-pollinated varieties and hybrid derivatives seed market accounted for a market value of USD 31.9 million in 2022. The demand for OPVs is projected to grow at a

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slower rate due to the increased natural calamities and infestation of pests and diseases in the region.

- Increased development of hybrid varieties and increased domestic demand are expected to drive the market's growth during the forecast period.

Increased cultivation areas to earn higher profits and meet the international market demand are driving the growth of onion seeds in the region, with India, Bangladesh, and Pakistan leading in production

- Asia-Pacific accounted for 31.7% of the global onion seed market in 2022. Onion is cultivated in all seasons, especially in the rabi season, with Bangladesh, India, and Pakistan leading the production in the region.
- India is the largest producer of onion in the region, with a production of 26.6 million metric tons in 2021. In 2022, it held a market share of 30.3% in the region's onion seed market. The area under onion cultivation was 1.3 million ha in 2017, which increased to 1.6 million ha in 2022. It is an extremely important vegetable crop for the domestic and international markets as it is an essential ingredient for cuisines.
- In Bangladesh, the production of onion increased from 1.8 million metric tons in 2017 to 2.2 million metric tons in 2021, an increase of 22.2%, due to the availability of hybrid seeds and increased land use. Hence, the growing area under cultivation of onion and increased production are expected to boost the sales of onion seeds during the forecast period.
- In Pakistan, Sindh was the leading onion-producing state, accounting for around 37% of the total production, followed by Balochistan (32%), Punjab (21%), and Khyber Pakhtunkhwa (10%) in 2021-2022. For most farmers, onions are valuable commodities for trading in Pakistan. Farmers consider onion as a profitable crop because it increases their income and productivity with high-yielding varieties. Therefore, the demand for new onion seed varieties is expected to increase during the forecast period.
- Increasing demand for high-yield varieties and increased cultivation area under onions are the factors anticipated to drive the onion seed market in the region during the forecast period.

#### Asia-Pacific Onion Seed Market Trends

International demand for onion and favorable market prices are driving onion cultivation in the region

- Asia-Pacific is one of the major regions in the world concerning the production of onions with the presence of major onion-producing countries. In 2022, the area under onion cultivation in Asia-Pacific accounted for 4.1 million hectares. The onion acreage in the region increased by 24.2% between 2017 and 2022, which is attributed to the demand for onion from the fresh food market and the increase in market prices from international markets. The area under cultivation of onion in the region declined by 2.9% in 2019 compared to 2018 due to the abnormally heavy monsoon rains declining the area harvested and reduction in market prices in a few countries.
- In Asia-Pacific, India was the major country concerning the area under onion cultivation which accounted for 43.3% of the acreage in 2022. The area under cultivation of onion in the country increased by 26.8% between 2017 and 2022. It is associated with favorable market prices either from private players or government procurement and the increase in export markets. For instance, the export of onion from India to the rest of the world increased by 48% in 2022 compared to 2021. China was the major country after India which occupied 29.8% of the area under onion cultivation in the region in 2022. Even though China and India are major countries in onion production, the genetic base, soil conditions, and flavor of onions are different and have higher demand for their own characteristics.
- Indonesia and Bangladesh are a few major countries in terms of the area under cultivation of onion in the region, which

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increased during the historic period. However, the adoption of commercial hybrids and increased exposure to the export market is estimated to drive India faster in the region.

Disease resistant and quality attributes are the most popular onion traits in the region, alongside growing consumption

- In Asia-Pacific, onion seed is one of the largest and most consumed vegetable seeds. The increasing demand for onions from consumers has boosted the market. Therefore, the need for consistent quality and increased productivity is increasing, and several traits are being incorporated for efficient performance in the field. Quality attributes such as long-day storage, attractive color, either red or white, and early or late maturity are the key traits adopted to fetch higher prices.
- The major traits preferred by growers in the region are disease resistance to pink root and downy mildew. In India and China, varieties with disease resistance to purple blotch are widely cultivated. Major companies are developing onion seed varieties through research stations, agricultural universities, and coordinated projects in the country. For instance, in 2021, Bejo and De Groot en Slot launched the first downy mildew-resistant shallot from seed, which was named Innovator.
- The major seed companies, such as Bayer AG, BASF SE, Groupe Limagrain, East-West Seeds, Sakata Seeds Corporation, and Bejo Zaden BV, are developing varieties with a focus on high-yielding, attractive color, and winter adaptability traits. The combination of multiple disease-resistant traits with quality attributes such as size and color has been gaining popularity in the region to earn higher profits.
- Therefore, high-quality onions with high disease resistance and increased shelf life and product innovations with quality attribute traits are anticipated to increase the demand for these seeds during the forecast period.

#### Asia-Pacific Onion Seed Industry Overview

The Asia-Pacific Onion Seed Market is fragmented, with the top five companies occupying 28.61%. The major players in this market are BASF SE, Bayer AG, Groupe Limagrain, Nong Woo Bio and Sakata Seeds Corporation (sorted alphabetically).

#### Additional Benefits:

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

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