

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

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### **Report description:**

The Asia-Pacific Rice Seed Market size is estimated at 4.46 billion USD in 2025, and is expected to reach 5.22 billion USD by 2030, growing at a CAGR of 3.20% during the forecast period (2025-2030).

Hybrid rice seeds will be adopted more in the future due to benefits such as resistance to diseases and drought, as well as the increasing food demand

- In Asia-Pacific, the open-pollinated varieties and hybrid derivatives (OPV's) seed segment dominated the market by volume and value. In 2022, OPV rice seeds accounted for 58.7% of the region's rice seed market.
- The adoption of open-pollinated varieties is mainly due to their lower cost than hybrid seeds. The major restraining factor of hybrid rice is that the rice yield grain declines significantly after the first generation of seeds (F1). Therefore, farmers purchase new seeds every season to cultivate hybrid rice. ?
- In 2022, hybrid rice seeds had a market share of 41.3%. The hybrid rice market, in terms of value, is estimated to record a CAGR of 2.9% during the forecast period (2023-2030), mainly due to increasing food demand owing to the rising population in the region and high demand for drought tolerance and disease resistance traits. For instance, brands such as Bayer AG's Arize Tej Gold provide resistance to seeding blight, and Vina Seed's Thein Uu8 provides resistance to different diseases, such as blast and sheath blight, along with higher productivity. Additionally, hybrid rice seeds improve food security by 15-20% compared to OPV rice seeds. Another major factor likely to drive the growth of hybrid rice seeds is their ability to resist abiotic and biotic stresses.
- Due to the low adoption rate of hybrid rice and the lack of proper input assistance, the OPVs market has dominated the market more than hybrid seeds in many countries. Thus, to increase the incentive to adopt hybrid rice, a hybrid variety that produces superior grain quality and resistance to stresses must be developed and distributed at lower prices in major rice-producing

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countries of the region.

Asia-Pacific being largest producer and consumer of rice with increasing cultivation area and export demand, the region is expected to grow in the future

- Asia-Pacific is one of the largest producers of rice in the global market. China dominated the Asia-Pacific rice seed market, accounting for 41.5%, followed by the Philippines (12.6%), Thailand (10.1%), and Japan (8.9%) in 2022. Moreover, in China, rice is one of the major cereal crops, and about 65% of Chinese people rely on rice. Globally, China had a market share of 32.6% in the same period.
- The area under rice cultivation in China was 30.4 million hectares in 2022, which was a decrease of 1.9% from 2017 due to crop diversification and urbanization in the country. However, the usage of hybrids increased production in the country.
- There is a high demand for rice cultivated in Asia-Pacific, especially India, by Western and other countries. For instance, in 2020-21, India's rice exports increased by 87% to 17.72 million metric ton in 2022 from 9.49 million metric ton in 2020. However, a ban on a variety of rice and a higher export duty of 20% has not affected the export quantity as of April-May 2023, which was 21.1% higher than the same period in 2022. Therefore, there is high demand for rice in domestic and international markets, which will help in the growth of rice seeds in the country during the forecast period.
- The transgenic rice grown commercially in the Philippines is Golden rice (GR), which accounted for 3.5% of the country's hybrid rice seed market in 2022. Golden rice (GR) is a transgenic rice that is an effective source of Vitamin A. The transgenic rice segment is projected to register a CAGR of 5.3% in the Philippines during the forecast period as Golden Rice (GR) witnesses high demand.
- The high consumption and increased use of hybrid seeds for higher productivity are expected to help the growth of the rice seed market during the forecast period.

#### Asia-Pacific Rice Seed Market Trends

India dominated the acreage under rice cultivation in the region due to favorable climatic conditions

- Asia-Pacific is one of the major rice-producing regions globally, as rice is considered the staple food for most Asia-Pacific countries such as India, China, and Indonesia. In 2022, Asia-Pacific accounted for 142.6 million hectares under rice cultivation. The area under cultivation of rice in the region increased by 2% between 2017 and 2022. During the historical period, there was fluctuation in the acreage due to unfavorable climatic conditions for rice cultivation.
- India occupied the major share of the area under rice cultivation, with 32.7% of the region's acreage in 2022, owing to the favorable climatic conditions and the higher demand for rice in the region. Around 36% of India's total rice production is from West Bengal, accounting for 13.62% of the total rice produced in India; Uttar Pradesh accounted for 12.81% and Punjab accounted for 9.96% in 2021.
- China and Bangladesh were the major countries after India concerning the area under rice cultivation, which accounted for 20% and 8% of the regions' rice acreage in 2022, respectively. In China, Hunan Province had the largest rice planting area in the country, with a total of 4 million hectares in 2022, and the highest production in the country, with 26.02 million metric ton, in 2021. The domestic demand for rice is increasing due to the increase in the population. To substantiate the demand, double-season rice cropping systems are being developed in the Hunan and Jiangxi provinces in China, thereby driving the rice seed market in the country.
- Therefore, the increased demand for rice to substantiate the growing population and rice being the staple food in the region are

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the factors driving the acreage under rice cultivation during the forecast period.

Drought tolerance and disease resistance are the popular rice seed varieties in the region, driving the growth of market

- Rice is a staple food in Asia-Pacific because the region consumes rice as a meal at least once daily. China and India are major rice producers globally and have a high demand for seeds resistant to diseases such as seedling blight, grain rot, and other bacterial diseases. Brands such as Bayer AG's Arize Tej Gold provide resistance to seedling blight, and Vina Seed's Thein Uu8 variety provides resistance to different diseases such as blast and sheath blight. Crops are also affected by biotic stresses and different pests such as Tryporyza incertulas and Gundhi bugs. In China and the Philippines, the major traits popularly used by growers are hybrids resistant to bacterial blight, brown plantoppers, rice blast, and heat at the heading stage. A good quality harvest has a desirable whole rice rate and amylose content.
- Drought tolerance is one of the major traits produced by seed companies as there have been changes in the climatic conditions, leading to high demand for this seed variety from the growers. For instance, in 2022, China suffered drier conditions than normal rainfall conditions, which was expected to help increase the demand for drought-tolerant seed varieties as well as wider adaptability traits.
- In 2020, the International Rice Research Institute (IRRI) signed a partnership agreement with hybrid seed-producing company Bioseed to develop new hybrid seed varieties for rice. Therefore, an increase in research activities and the increasing demand for hybrid seeds for resistance to diseases are expected to help the rice seed market grow during the forecast period.

#### Asia-Pacific Rice Seed Industry Overview

The Asia-Pacific Rice Seed Market is fragmented, with the top five companies occupying 13.32%. The major players in this market are Advanta Seeds - UPL, Beidahuang Kenfeng Seed Co. Ltd, SL Agritech Corporation (SLAC), Syngenta Group and Yuan Longping High-Tech Agriculture Co. Ltd (sorted alphabetically).

#### Additional Benefits:

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

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