

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

Market Report | 2025-04-28 | 434 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 China Seed Market size is estimated at 12.27 billion USD in 2025, and is expected to reach 14.13 billion USD by 2030, growing at a CAGR of 2.86% during the forecast period (2025-2030).

The prevalence of diseases, the increase in foreign investments, and the increasing number of breeding stations are the major factors driving the seed market in the country

- China uses more high-yielding varieties than any other country, which increases the productivity of crops compared to other countries. With the declining population depending on agriculture, urban and semi-urban greenhouses are increasing in the country.
- In China, hybrids accounted for 77.6% of the seed market in 2022, whereas open-pollinated varieties accounted for 22.4% in the same period. Hybrids are being adopted for corn, cotton, soybean, and vegetables such as tomatoes, cucurbits, brassicas, and leafy vegetables. Moreover, the area sown with hybrids was about 55 million hectares, and the area under open-pollinated varieties was 12.1 million hectares in 2022 because of the demand for high yield and resistance to diseases and insects.
- Transgenic hybrids accounted for 25.1% of the hybrid seed segment in 2022, with approval for commercial cultivation of corn, rice, soybean, and cotton. These crops are being cultivated with traits such as disease resistance, insect resistance, early maturity, and quality attributes such as uniformity and lodging resistance to meet the increased demand from processing industries and households.
- The number of national seed breeding and production bases in China increased to 216 in 2022, and China's liberalized foreign investment resulted in an increase in seed companies from 730 in 2018 to 9,065 by the end of 2022. About 65% of the new companies were registered at the county level. During the forecast period, there will be an increase in hybrids offered by the

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

companies to the growers of grain and other crops.

- The prevalence of diseases, the increase in foreign investments, and the increasing number of breeding stations are the major driving factors that are expected to drive the seed market in the country during the forecast period.

China Seed Market Trends

Rice and corn accounted for more than 50% of the row crops, but government policies are increasing the cultivation of oilseeds

- China is a major agricultural producer. It accounted for 25% of the grains produced globally and fed 20% of the global population in 2022. Among cereals, rice and corn are the major crops in the country. Rice and corn had a share of more than 50% by area of cultivation. Corn is the major field crop with the highest consumption of 300 million metric ton, followed by rice with 155 million metric ton in 2022. However, it is estimated that the oilseed area will increase in the country as the government policy has the objective to stabilize the corn production and increase the soybean output, which will require a larger area to be cultivated as the country wants to decrease the dependence on imports of soybean.

- In 2022, wheat accounted for 20.9% of the field crop cultivation area because of the high demand for ethanol production, consumption by animals as feed, and demand from mills for the production of flour. Therefore, these factors also helped in the growth of the cultivation area by 1.7% from 2020 to 2022. However, the area for wheat cultivation witnessed a decrease of 2.8% from 2017 to 2022 because of the increase in the demand for oilseeds and a decrease in wheat consumption by 9.5 million metric ton from 2021 to 2022.

- Rice, canola, rapeseed, and mustard are the other major crops because of the high demand for these crops. Rice is consumed along with many Chinese dishes, due to which it has a higher demand for cultivation, and the area of cultivation for rice has increased from 30 million hectares in 2019 to 30.4 million hectares in 2022. Therefore, The high demand for consumption, government policies increasing the production of oilseeds, and the high demand for export for ethanol production will drive the cultivation area for field crops during the forecast period.

Rice and corn are major staple foods with the availability of different seed traits, such as disease resistance and drought tolerance, suitable for sustainable crop production

- Grain production, especially rice and corn in China, has grown rapidly during the past few decades, mainly due to increased yields of grain than the increased planting areas across China. Moreover, corn is an important crop cultivated by growers because it is a high-profit crop, and the growers have a high demand for traits such as disease resistance, improved grain quality, early maturity, lodging tolerance, and wider adaptability to different regions and climate conditions.

- For both crops, disease resistance is the most popular trait, while other traits, such as drought tolerance, insect resistance, moisture stress, and effective tillers with panicles, are cultivated in the country. In China, the major disease-resistant traits that are popularly used by seed companies are resistance to bacterial blight, brown planthoppers, rice blasts, early rots, and leaf diseases, and heat resistance at the heading stage, as they lead to heavy yield loss. Companies such as Bayer AG, Yuan Long-Ping Hi-tech, and Beidahuang Kenfeng Seed Co. Ltd are actively involved in breeding these varieties.

- Drought tolerance is one of the major traits produced by seed companies as there have been changes in the climatic conditions,

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

which has led to a high demand for this seed variety by growers. For instance, in 2022, China suffered drier conditions than normal rainfall conditions, which was expected to help in increasing the demand for drought-tolerant seed varieties.

- Factors such as low water due to climatic conditions, pests, and diseases affecting the growth of crops are expected to help in the introduction of new seed varieties during the forecast period.

China Seed Industry Overview

The China Seed Market is fragmented, with the top five companies occupying 15.08%. The major players in this market are Anhui Tsuen Yin Hi-Tech Seed Industry Co. Ltd, Beidahuang Kenfeng Seed Co. Ltd, Groupe Limagrain, 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

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

4.1.1 Row Crops

4.1.2 Vegetables

4.2 Most Popular Traits

4.2.1 Rice & Corn

4.2.2 Soybean & Cotton

4.2.3 Tomato & Lettuce

4.3 Breeding Techniques

4.3.1 Row Crops & Vegetables

4.4 Regulatory Framework

4.5 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

5.1 Breeding Technology

5.1.1 Hybrids

5.1.1.1 Non-Transgenic Hybrids

5.1.1.2 Transgenic Hybrids

5.1.1.2.1 Herbicide Tolerant Hybrids

5.1.1.2.2 Insect Resistant Hybrids

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.1.1.2.3 Other Traits
- 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 Type
 - 5.3.1 Row Crops
 - 5.3.1.1 Fiber Crops
 - 5.3.1.1.1 Cotton
 - 5.3.1.2 Forage Crops
 - 5.3.1.2.1 Alfalfa
 - 5.3.1.2.2 Forage Corn
 - 5.3.1.2.3 Forage Sorghum
 - 5.3.1.2.4 Other Forage Crops
 - 5.3.1.3 Grains & Cereals
 - 5.3.1.3.1 Corn
 - 5.3.1.3.2 Rice
 - 5.3.1.3.3 Sorghum
 - 5.3.1.3.4 Wheat
 - 5.3.1.3.5 Other Grains & Cereals
 - 5.3.1.4 Oilseeds
 - 5.3.1.4.1 Canola, Rapeseed & Mustard
 - 5.3.1.4.2 Soybean
 - 5.3.1.4.3 Sunflower
 - 5.3.1.4.4 Other Oilseeds
 - 5.3.1.5 Pulses
 - 5.3.2 Vegetables
 - 5.3.2.1 Brassicas
 - 5.3.2.1.1 Cabbage
 - 5.3.2.1.2 Carrot
 - 5.3.2.1.3 Cauliflower & Broccoli
 - 5.3.2.1.4 Other Brassicas
 - 5.3.2.2 Cucurbits
 - 5.3.2.2.1 Cucumber & Gherkin
 - 5.3.2.2.2 Pumpkin & Squash
 - 5.3.2.2.3 Other Cucurbits
 - 5.3.2.3 Roots & Bulbs
 - 5.3.2.3.1 Garlic
 - 5.3.2.3.2 Onion
 - 5.3.2.3.3 Potato
 - 5.3.2.3.4 Other Roots & Bulbs
 - 5.3.2.4 Solanaceae
 - 5.3.2.4.1 Chilli
 - 5.3.2.4.2 Eggplant
 - 5.3.2.4.3 Tomato
 - 5.3.2.4.4 Other Solanaceae
 - 5.3.2.5 Unclassified Vegetables

Scotts International. EU Vat number: PL 6772247784

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

www.scotts-international.com

- 5.3.2.5.1 Asparagus
- 5.3.2.5.2 Lettuce
- 5.3.2.5.3 Peas
- 5.3.2.5.4 Spinach
- 5.3.2.5.5 Other Unclassified Vegetables

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Anhui Tsuen Yin Hi-Tech Seed Industry Co. Ltd
 - 6.4.2 BASF SE
 - 6.4.3 Beidahuang Kenfeng Seed Co. Ltd
 - 6.4.4 Bejo Zaden BV
 - 6.4.5 East-West Seed
 - 6.4.6 Groupe Limagrain
 - 6.4.7 Rijk Zwaan Zaadteelt en Zaadhandel BV
 - 6.4.8 Sakata Seeds Corporation
 - 6.4.9 Syngenta Group
 - 6.4.10 Yuan Longping High-Tech Agriculture 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

www.scotts-international.com

**China Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts
(2025 - 2030)**

Market Report | 2025-04-28 | 434 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	<input type="text" value="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

