

Cotton Seed (seed For Sowing) - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 392 pages | Mordor Intelligence

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Report description:

The Cotton Seed Market (seed For Sowing) size is estimated at 1.57 billion USD in 2025, and is expected to reach 2.08 billion USD by 2030, growing at a CAGR of 5.82% during the forecast period (2025-2030).

Transgenic hybrids occupy the major share of the cotton seed market, with higher demand for insect-resistant hybrids

- The hybrid segment has a higher share in the global cotton seed market, which accounted for 94.5% of the market in 2022. The high-yielding and pest-resistant properties of hybrid seeds help reduce crop losses and production costs.??
- In transgenic cotton hybrids, insect-resistant hybrids are highly cultivated and held around 88.4% of the market in the transgenic cotton market in 2022. The cotton crop can be damaged right from the seedling stage by several pests, such as grasshoppers, thrips, aphids, and jassids. Spiny bollworms, spotted bollworms, American bollworms, and pink bollworms are prominent among them. Insect-resistant cotton hybrids help in reducing insect attacks and increase yield.
- Asia-Pacific was the primary region in the world concerning the hybrid cotton seed market because the region faces a significant challenge of crop losses due to pests and diseases. In 2022, Asia-Pacific accounted for 76% of the global hybrid cotton seed market.
- Herbicide-tolerant cotton hybrids are popular in North America, which accounted for 88.9% of the global herbicide-tolerant cotton hybrid market in 2022. Weeds are a major problem in North America. To prevent weeds without affecting the crop, growers use herbicide-tolerant seeds.
- The open-pollinated varieties of cotton are mainly cultivated in rainfed conditions in Europe, which is estimated to register a CAGR of 9.1% during the forecast period due to the low cost of seeds and the ability to withstand water stress.
- Therefore, with the increasing usage of transgenic hybrids for their higher yield and lower cost of production, as well as the

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demand from textile and other industries, the cotton seed market is estimated to witness a CAGR of 5.8% during the forecast period.

Asia-Pacific dominates the market with a large area under cotton cultivation and high demand from processing industries

- Asia-Pacific is the largest cotton seed market with a significantly large cultivation area, driven primarily by the demand for cotton from the textile industry. India accounted for the major share of 73.7% of the Asia-Pacific market by value in 2022, owing to its export demand.
- In the Asia-Pacific region, hybrid seeds hold a significant edge over open-pollinated varieties and hybrid derivatives in the cotton seed market, both in terms of volume and value. This dominance can be attributed to the rising crop losses caused by pests and diseases, where hybrids perform better with enhanced resistance to insects and diseases.
- North America is the second largest producer globally. It accounted for 11.9% of the global cotton seed market value in 2022. The United States is the largest cotton-producing and exporting country in North America, with 11.1% of the global share in terms of value in 2022.
- Europe is the fastest-growing seed market owing to the increasing adoption rate of commercial seeds. Hybrids are used more than OPVs in the European Union due to the need for high yield and high stability in stress conditions. In 2022, the hybrid seeds segment accounted for 92.6% of the total cotton seed market in the region and was growing at a faster rate than the OPVs.
- Sub-Saharan Africa has a climate favorable for pest growth, resulting in a severe attack of pests on cotton and subsequent yield losses. For instance, in West Africa, an average of 25-35% of cotton yield has been reduced between 2017 and 2022 because of pests. Due to this reason, demand for hybrids is expected to increase as hybrids are resistant to pests and have high yield potential.
- The rising adoption of hybrids and rising demand for cotton from the textile industry are estimated to drive the seed market.

Global Cotton Seed Market (seed For Sowing) Trends

Globally, India dominated the cotton cultivation due to favorable agronomic conditions and huge domestic and export demand for cotton.

- Cotton is the major fiber crop cultivated in the world. The total area under cotton cultivation reached 33.2 million hectares in 2022, which decreased by 3.9% between 2017 and 2022. Fluctuations in cotton prices and market uncertainties led farmers to adopt other crops that are stable and profitable. Regions like Asia-Pacific faced water scarcity in cotton production. In such areas, farmers shifted to crops that require less water. India leads the global cotton cultivation. It accounted for 41.3% of the global area under cotton cultivation, with 13.7 million ha in 2022. The country has significant domestic and export demand for cotton. As a result, the cotton cultivation area in the country is estimated to reach 16.1 million ha by 2030.
- Africa is the second largest region, accounted for 15.1% of the global cotton acreage in 2022. The cultivated area in Africa increased by 7.5% between 2017 and 2022. Increased access to global markets and government policies such as subsidies and infrastructure improvements to promote cotton production have incentivized farmers to expand their cultivation land for cotton.
- South America is the fastest-growing region in terms of area under cotton cultivation globally. The cotton acreage increased by 51.8% between 2017 and 2022 in South America due to warm temperatures and consistent rainfall in many areas, which provide an ideal environment for the extension of cotton acreage. Brazil dominated the cultivation area in the region, with a 75.6% share in 2022. Brazil is also a significant player in the global cotton market. The rise in domestic and export demand for cotton and favorable government policies are estimated to drive the expansion of cotton acreage worldwide during the forecast period.

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High yield loss in cotton due to bollworms and weeds increased the demand for insect-resistant and disease-resistant seeds with wider adaptability

- Cotton crops are prone to damage caused by insect pests. There are more than 166 insects that affect the crop. It is prone to damage from the seedling stage by grasshoppers, thrips, and aphids. The other major insects that cause severe damage are jassids, spiny bollworms, spotted bollworms, and pink bollworms. For instance, during the 2021-2022 growing season, farmers in India witnessed a severe infestation of pink bollworms, which led to significant crop losses across the country. Companies such as Bayer AG, Anhui Tsuen Yin Hi-Tech Seed Industry Co. Ltd, and Kaveri Seeds are providing seed varieties resistant to sucking pests to help growers earn high profits by producing high-quality cotton for processing industries. Thus, there is a high demand for insect-resistant varieties in the market.
- Seed manufacturing companies are developing varieties with drought-tolerant and disease-resistant traits due to abnormal climatic conditions and the prevalence of diseases such as cotton leaf curl virus (CLCV), soil-borne diseases, and bacterial diseases. Products such as Pravir, Surpass, and Balraj + (MRC 7365 BG II) are used by cotton growers to resist diseases.
- There is a growing demand for cotton varieties that exhibit wider adaptability and possess quality traits like high fiber quality, white extra-long staples, medium-sized bolls, and an elliptical shape. For instance, BASF SE, Bayer AG, and JK Agri Genetics offer different seed varieties that have these traits to meet the growing demand.
- The prevalence of sucking pests and diseases and changing weather conditions are expected to drive the demand for improved cotton seed varieties during the forecast period.

Cotton Seed (seed For Sowing) Industry Overview

The Cotton Seed Market (seed For Sowing) is fragmented, with the top five companies occupying 38.46%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Kaveri Seeds and Maharashtra Hybrid Seeds Co. (Mahyco) (sorted alphabetically).

Additional Benefits:

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

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