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

Market Report | 2025-04-28 | 235 pages | Mordor Intelligence

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Report description:

The Europe Forage Seed Market size is estimated at 1.32 billion USD in 2025, and is expected to reach 1.6 billion USD by 2030, growing at a CAGR of 3.95% during the forecast period (2025-2030).

Hybrid forage seeds dominated the market due to their traits such as increased yield, disease resistance, and widely adaptable nature

- In 2022, hybrids dominated the European forage seed market and accounted for about 88% of the market. Open-pollinated varieties accounted for 12% in the same year. The high share of hybrids is associated with traits such as high yield, disease resistance, high vigor, and wider adaptability. Only non-transgenic hybrid varieties are approved for cultivation due to the ban on genetically engineered crops in the region.
- In 2022, forage corn held the major share of 62.9% in the hybrids segment due to the large area under cultivation and higher adoption of hybrids. The volume of corn hybrid seeds increased by 2.1% in 2022 compared to 2021, primarily due to increased forage demand from large commercial dairy farms.
- Alfalfa held a share value of 36% in the European hybrid forage seed market in 2022 due to the high seed replacement rate and high demand from the livestock industry, which may further increase the sales of hybrid seeds during the forecast period.
- Europe is one of the largest producers of non-transgenic hybrid forage corn, contributing an 88% share value of the European forage seed market in 2022. The demand for non-transgenic, hybrid forage corn seeds in the region may increase further during the forecast period due to their high nutritional value.?
- Germany was the major country in terms of area under OPVs. In 2022, the country had a 33.2% area of the total European forage OPVs and hybrid derivatives due to the prevalence of native pastures in the country. The use of OPVs lowers cultivation

costs, which is likely to boost their use in the future.
- Therefore, both hybrid and OPV seed varieties are anticipated to grow during the forecast period due to increased demand from the livestock sector.

Germany is leading in forage seed sales with high demand from the processing industry and increasing demand for animal feed

- Europe is one of the significant producers of forage crops. In 2022, the market accounted for 8.8% of the European seed market and 26.7% of the global forage seed market by value. The market is being driven by the increasing animal population and rising meat consumption.
- To meet the growing demand for high forage quality and shorter harvest time periods, companies have been developing new seed varieties for the benefit of growers. For instance, farmers now have access to alfalfa varieties such as DKC 3218, DKC 3204, Debalto, and Marcamo.
- France had the highest sales of forage seeds in Europe, with a market share of 28.6% in 2022, followed by Germany, with 20.4%. The driving factors include growing demand for feed products, consumer demand for livestock products, an increase in the livestock population, and shrinking land for grazing animals.
- The United Kingdom is one of the fastest-growing countries, with a projected CAGR of 5.9% during the forecast period due to high demand for forage from livestock farmers and the country witnessing an increase in biofuel production and pig population.
- Other countries such as Italy, the Netherlands, and Poland also have a significant demand for forage crops, and the area harvested in these countries increased by 6.8% from 2017 to 2022.
- The European Seed Association's regulation, which governs the forage seed market, helped increase investments in forage seed production to enhance the unpredictability of the seed cycle, soil conditions, and time incentive returns. Therefore, the forage seed market in the region is estimated to register a CAGR of 3.9% during the forecast period.

Europe Forage Seed Market Trends

An increase in the demand for quality feed for livestock and a suitable climate are driving the forage cultivation

- Europe is one of the largest producers of forages in the world, as it has diverse landscapes and a suitable climate for forage cultivation. The total forage cultivation area in the region reached 9.1 million ha in 2022, which increased by 4.6% between 2017 and 2022 due to increasing feed demand from livestock. For instance, in 2022, organic forage production in Europe exceeded more than 250,000 metric ton due to the increasing demand for organic feed.
- Among forage crops, forage corn and alfalfa have the largest area under cultivation. They accounted for 63.5% and 35.4% of the European forage cultivation area in 2022, respectively, due to their high demand in the region driven by their high energy content and easy digestibility. In recent years, the area of forage sorghum in Europe has constantly grown due to its increasing demand for animal feed and the production of alcohol and biofuels. Another reason for the increasing area under cultivation is the rising drought in some parts of the region. Therefore, farmers are shifting to sorghum farming as it has inherent drought tolerance. The initiatives by organizations are helping in the expansion of areas under cultivation. For instance, the French National Federation of Maize and Sorghum Seed Production (FNPSMS) and the PZPK (Poland) are promoting the benefits of maize and sorghum and their cultivation in Spain, France, Germany, and Bulgaria.
- Germany and France held the major areas in Europe, and they accounted for 25.6% and 18.6% of the overall forage cultivation in the region in 2022, respectively, due to their significant agricultural land and suitable climate. Therefore, the growing demand for animal feed in the region is estimated to put pressure on farmers to expand the area under forage crops to meet the demand.

Hybrid forage seeds are gaining traction with wider adaptability and early matured traits

- Alfalfa and forage corn are popular forage crops extensively cultivated across Europe. Due to their significance in the livestock industry, scientific efforts are being made to enhance the yield and quality of alfalfa through breeding techniques. As the climate changes, so do the environmental factors that impact crops the most. Consequently, demand for high uniformity and wider adaptability alfalfa cultivars that adapt to regional conditions has increased and are widely employed by farmers.?
- Companies such as Bayer, DLF, and Barenbrug have introduced many varieties of alfalfa and forage corn in the United Kingdom, such as Alfalfa (DKC 3218, DKC 3204, Debalto, and Marcamo), as well as forage corn (Daisy, Fado, and Power 4.2). These varieties possess the ability to withstand diverse environmental conditions, adapt to various soil types, and withstand field stress and heat conditions.?
- The demand for seeds with early maturity and high starch content characteristics is estimated to grow rapidly. These varieties offer a shorter growing period, allowing farmers to harvest sooner, and the high starch content in forage corn enhances its nutritional value for animal feed. Moreover, the EU Commission initiated a new project called REFORMA (2016-2020) to address farmers' requirements. This project aims to develop advanced breeding techniques and introduce new cultivars of alfalfa and other forage crops. ?
- The demand for robust varieties of alfalfa and forage corn with traits such as disease resistance, high dry matter content, insect resistance, long shelf life, and drought tolerance is projected to increase significantly during the forecast period to compensate for yield losses and increase productivity to meet consumption requirements.?

Europe Forage Seed Industry Overview

The Europe Forage Seed Market is fragmented, with the top five companies occupying 30.24%. The major players in this market are Advanta Seeds - UPL, Euralis Semences, InVivo, RAGT Group and Royal Barenbrug Group (sorted alphabetically).

Additional Benefits:

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

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