

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

Market Report | 2025-04-28 | 249 pages | Mordor Intelligence

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### **Report description:**

The Europe Grain Seed Market size is estimated at 7.55 billion USD in 2025, and is expected to reach 9.57 billion USD by 2030, growing at a CAGR of 4.85% during the forecast period (2025-2030).

OPVs witness increased usage because they offer resistance to pests and diseases

- In Europe, the open-pollinated seed segment dominated the market in terms of volume and value. Non-transgenic hybrids accounted for 33.8% of the total grain seed market value in 2022. The non-transgenic hybrids' share increased by 16.3% between 2017 and 2022 due to the expansion of planting area under grains, rising demand for organic produce, and rising per capita consumption.
- An increase in area under organic farming and conventional farming are major factors driving the growth of non-transgenic hybrids. For instance, the organic farming area under cereals in Europe increased by 24.4% between 2017 and 2021. The organic area under farming was 17.8 million hectares in 2021.
- In 2022, insect resistance was the only trait grown under transgenic hybrids, and it contributed to 1.5% of the hybrid seed market value. Major countries growing insect-resistant crops (corn) in Europe are Spain and Romania.
- Corn is the only crop approved for cultivation using transgenic seeds in Europe. The market value of transgenic insect-resistant corn increased by 26.1% between 2017 and 2022.
- Wheat and other grains and cereals were the major crops grown in Europe using open-pollinated varieties and hybrid derivatives in 2022. They accounted for 56.5% and 38.4% of the total OPV seeds market value in Europe.
- The usage of commercial seeds is estimated to increase as the demand for livestock products, compensated by GM crops as animal feed, has been increasing in the region. Thus, with the emergence of new insect pests, the insect-resistant transgenic

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hybrid seed market is projected to grow in the country during the forecast period.

- Therefore, rising demand for organic food and emerging pests and insects are estimated to drive the hybrid seed market at the fastest rate in the region.

France dominated the grain seed market with corn being the major crop growing in the country

- In Europe, the grain seed segment was the major contributor to the overall seed market. It accounted for 55.4% of the European seed market in terms of value in 2022. The region had a major share of the corn seed market, which accounted for 8.7% of the global corn seed market in 2022.

- France is the leading producer of corn. Corn is grown across France, with the country's southern region producing the majority of the crop. The Aquitaine region accounted for 21% of overall corn production in the country, while the French state of Midi-Pyrenees accounted for 13% in 2022. The crop is planted in the country between April and May and harvested between September and November. France is also a primary producer and exporter of sorghum in Europe, and it accounted for 28.7% of the European sorghum seed market in 2022. The majority of sorghum traded in Europe comes from local sources.

- Italy is the major rice producer in Europe. The rice seed market in the country accounted for 34.9% of the European rice seed market in 2022. Most rice production is done in the northern Piemonte, Lombardia, and Veneto regions since water is abundant there, and the rice crop can be grown in wet places. Most rice varieties in Italy are Japonica, with the rest having Indica.

- Germany and France were the major producers of wheat in Europe, which together accounted for 52.3% of the European wheat seed market in 2022. The export demand for wheat is moving in an upward trend, which is anticipated to increase the demand for wheat in the region.

- Factors such as higher export demand, increase in the consumption demand, and increased area under cultivation of grains and cereals are expected to drive the seed market growth in the region.

#### Europe Grain Seed Market Trends

Increased demand from processing industries and increasing prices of cereals are driving the area under crop cultivation

- Grains and cereals occupied the major area under cultivation of crops in Europe. The area under cultivation of the grains and cereals in 2022 accounted for 134.04 million ha, which increased by 1.6% from the previous year due to strong demand for cereals as a staple food and an increase in output prices. The acreage declined in 2017 and 2018 in major grains and cereals-producing countries such as Turkey, Italy, Russia, France, and Germany. The major reasons for the decline include unexpected heavy rainfall, hail damage, higher precipitation prior to planting season, and shifting toward oilseeds.

- In Europe, Russia was the major country in terms of acreage under grains and cereals, which accounted for 32.8% of the acreage in 2022. The higher acreage was because of the trade advantage with the Black Sea and favorable climatic conditions for cultivating primary cereals such as corn and wheat. However, the acreage declined in 2021 by 3% compared to 2020 due to the ice crusting event affecting barley and wheat crop acreage in the country.

- Ukraine and Turkey are also the major cultivating countries of grains and cereals, which accounted for 12.04% and 8.3% of the overall acreage in 2022, respectively. Ukraine was one of the major exporters of wheat and corn to neighboring European countries. In Ukraine, wheat and corn accounted for 7.3 million hectares and 5.8 million hectares in 2022, respectively, which together accounted for 80.7% of the area under the grains and cereals segment in the country.

- Therefore, increasing demand for human consumption, blending industries for biofuel, and favorable market prices from export markets are anticipated to increase the area under grains and cereals during the forecast period.

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Climatic factors and disease management are driving the adoption of hybrid varieties of wheat and corn in the region

- In the last few years, large parts of Europe have witnessed a decline in the yield performance of wheat and corn. The decline is primarily attributed to the impact of climate uncertainties and variability on these crops in many countries over the last 5 to 15 years, depending on the country. Moreover, stressful environmental conditions and biotic stresses, such as diseases and pests, have led to considerable damage to crops. For instance, susceptible genotypes with high disease severity have resulted in more than 30% of grain yield losses. Therefore, growers are shifting toward resistant varieties to minimize these losses.?
- Companies such as Syngenta, Groupe Limagrain, and KWS SAAT are offering disease and pest-resistant wheat varieties such as SY Insitor, Graham, LG Typhoon, and LG Prince to address yield losses caused by diseases like Septoria, rusts, OWBM (orange wheat blossom midge), and others, in field conditions. Additionally, in 2021, Bayer and RAGT Semences collaborated to develop hybrid wheat seeds using the latest breeding methodologies, high-performing seed product systems, and advanced digital solutions.?
- The demand for corn varieties that are resistant to lodging has increased among European farmers. These varieties can endure adverse weather conditions and reduce crop losses caused by lodging. Corteva Agriscience offers varieties like P7179 and P7326, which have improved standability during strong winds.?
- Corn cultivars with early matured, high starch and dry matter content, and disease-resistant traits are projected to gain more traction during the forecast period, subjected to the changing climatic conditions and the increasing demand for high-yield production.?

## Europe Grain Seed Industry Overview

The Europe Grain Seed Market is moderately consolidated, with the top five companies occupying 47.93%. The major players in this market are Bayer AG, Corteva Agriscience, Groupe Limagrain, KWS SAAT SE & Co. KGaA and Syngenta Group (sorted alphabetically).

### Additional Benefits:

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

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