

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

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Report description:

The India Rice Seed Market size is estimated at 360.6 million USD in 2025, and is expected to reach 470.4 million USD by 2030, growing at a CAGR of 5.46% during the forecast period (2025-2030).

Higher development cost and non-availability of the hybrids are driving the demand for open-pollinated seed varieties

- In India, farmers predominantly favor open-pollinated varieties and hybrid derivatives over hybrids when it comes to rice cultivation. This preference stems from the fact that rice crops are largely self-pollinated, and the high costs associated with hybrid development have limited their widespread adoption.
- In 2022, the area under the cultivation of rice in the country was 46 million ha, an increase of 7% from 2017 due to the increasing usage of commercial seeds for high yield and product quality.
- Hybrids accounted for 16.5%, whereas OPVs accounted for 83.5% in 2022.?? Hybrids had a lower share than OPVs because the growers prefer to sow larger quantities of open-pollinated seed varieties as the development of hybrid seed involves higher cost and non-availability of hybrid rice seeds in the Indian market.
- Furthermore, the private sector is not performing research and development for the seed production of high-volume and low-margin crops, including rice. The public sector seed corporations are expected to remain dominant in cereals, including the rice seed segment in the country. At present, 15 state seed corporations and two national seed corporations are operating in the country.
- However, the hybrid seed segment is projected to register a CAGR of 5.7% during the forecast period due to higher productivity from the decreasing per capita availability of arable land and resistance to different diseases as well as weeds. These factors help the rice growers to earn high profits by reducing crop loss.

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- The non-availability of commercial hybrid seeds in the country and preference for sowing large quantities of OPVs are expected to drive the open-pollinated seed varieties segment in the country during the forecast period.

India Rice Seed Market Trends

Various national and state-level schemes promoting rice cultivation and growing demand are driving rice cultivation in India

- India is one of the largest producers and consumers of rice globally, with an overall rice cultivation area of about 46.3 million hectares as of 2022. Indian rice cultivation area accounted for about 32.7% of the Asia-Pacific rice cultivation area in the same year. In India, rice is grown under widely varying altitudes and climate conditions. Rice cultivation in India extends from 8 to 35°N latitude and from sea level as high as 3000 meters. The kharif season is a major rice-growing season in the country.
- In India, Uttar Pradesh, Odisha, Chattisgarh, Bihar, and Punjab are the top states in terms of total area under rice cultivation. Collectively, these states accounted for about 41.6% of the Indian rice cultivation area in 2022. Moreover, various national and state-level schemes, such as the National Food Security Mission (NFSM), actively promote rice cultivation nationwide. These schemes are anticipated to drive rice cultivation in the country during the forecast period.
- The total rice cultivation area in the country increased by about 5.2% between 2017 and 2022. This is further anticipated to increase by about 10.0% and reach 51.6 million hectares by the end of the forecast period. This increase is mainly attributed to the growing domestic demand and the export potential of rice from India. For instance, India exported 22 million metric tons of rice in 2022, worth about USD 9.6 billion.
- The growing demand for rice in both domestic and international markets and the government schemes promoting rice cultivation are the major factors anticipated to drive rice cultivation in India during the forecast period.

High demand for rice seeds with improved traits such as disease resistance, wider adaptability to different regions and climatic conditions

- In India, rice is a major crop occupying the largest area for cultivation in the country. Since the Green Revolution, a number of varieties of rice have been introduced in the country. Currently, conventional hybrids are being replaced with hybrids with advanced traits as the crop is affected by biotic stresses and different pests such as *Tryporyza incertulas* and Gundhi bugs. Therefore, companies are offering hybrid seeds and herbicide-tolerant transgenic seeds to growers to increase productivity and earn high profits. A major biotic constraint to rice diseases can reduce yields by 20-100%, depending on severity. Major diseases such as blast, brown spot, bacterial blight, sheath blight, and tungro viral disease cause significant damage, and new minor diseases such as false smut, grain discoloration, early seedling blight, narrow brown spot, and sheath rot have also emerged as significant problems. Various factors, including growing conditions and varietal susceptibility, can lead to losses of 1-100%.
- Major traits available in rice are disease resistance, wider adaptability to different regions and climatic conditions, tolerance to water lodging conditions, moisture stress, and drought tolerance, producing an effective and high number of tillers with extensive panicles used in cultivation. Disease-tolerant varieties are in huge demand, especially BLB (bacterial leaf blight), to increase yields. Currently, there are no effective chemicals against this pathogen, which causes up to 50% yield losses in field conditions.

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- The demand for rice seeds with improved traits is increasing as farmers are turning toward sustainable agriculture. Thus, the market for seeds with improved traits is anticipated to show a positive trend during the forecast period.?

India Rice Seed Industry Overview

The India Rice Seed Market is fragmented, with the top five companies occupying 36.82%. The major players in this market are Advanta Seeds - UPL, Kaveri Seeds, Maharashtra Hybrid Seeds Co. (Mahyco), Nuziveedu Seeds Ltd and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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