

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

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Report description:

The North America Alfalfa Seed Market size is estimated at 332.4 million USD in 2025, and is expected to reach 414.7 million USD by 2030, growing at a CAGR of 4.53% during the forecast period (2025-2030).

The application of alfalfa in diverse industries and the ability to cultivate it as a rotational crop are driving the market

- In North America, alfalfa accounted for 15.7% of the forage seed market in 2022. The alfalfa seed market grew by 18.8% during the historical period as the majority of cattlemen wanted to have digestible feed, thus driving the demand for alfalfa seeds.
- The overall acreage under alfalfa cultivation in North America was 11.5 million ha in 2022, which has increased by 3% since 2017 due to the availability of different cultivars and increased demand from animal feed and meat industries.
- The United States is the largest user of hybrid seeds in North America due to the increased demand and availability of disease- and insect-resistant hybrids. The ability to grow alfalfa as a rotational crop to restore the lost vigor and sustain nitrogen required for the next crop has driven the farmers to adopt hybrids.
- Other traits like wider adaptability and drought tolerance were also largely popular in the region, accounting for 75.7% of the North American transgenic alfalfa seed market in 2022. For instance, Bayer AG and KWS Saat were the major companies that came up with transgenic alfalfa seeds that had these traits in the region.
- However, Canada was the largest country using open-pollinated varieties in 2022, accounting for 94.4% of the OPV alfalfa seed market in North America. The market is estimated to decline due to the increased availability of hybrids with more protein content that are highly suitable for the production of enzymes and biofuel.
- Therefore, factors such as the increased demand for protein feed from cattlemen, the rising preference for transgenic alfalfa hybrids, and the ability to grow alfalfa as a rotational crop are anticipated to drive the North American commercial alfalfa seed

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market, with a CAGR of 4.6%, during the forecast period.

Canada dominates the alfalfa seed market due to an increase in cultivation area and favorable government policies

- North America is the largest alfalfa seed market in the world, accounting for USD 290.1 million in 2022, which grew by 18.7% compared to 2017. This growth can be due to the high production, favorable weather conditions, and increased demand by dairy farmers and livestock industries.
- Canada has a high demand for alfalfa seeds in the region because of an increase in the demand for alfalfa as feed, increased cultivation area, and an increase in profit margins. In the country, the alfalfa supply accounts for approximately 60% of the diet of beef cattle and 40% of the diet of dairy cattle, which is expected to increase the demand for alfalfa seeds.
- In 2022, the Canadian government invested about USD 2.6 million to help the alfalfa growers association be equipped with advanced technologies and generate higher yields. Therefore, production is expected to increase, along with the demand for seeds for alfalfa, during the forecast period.
- The United States is one of the major exporters of alfalfa hay. In 2022, Saudi Arabia, Mexico, Algeria, Argentina, Libya, Peru, and Canada were the top five export destinations for alfalfa, which imported USD 55.5 million worth of alfalfa.
- Due to its crude protein content, the use of alfalfa hay is considered beneficial, particularly for cattle feed. Cattle production is the most important agricultural sector in the United States. Therefore, the demand for alfalfa seeds is expected to increase during the forecast period.
- Factors such as an increase in the demand for cattle feed, favorable weather conditions, and growing exports of alfalfa to other countries are estimated to drive the market in the region during the forecast period, with a CAGR of 4.5%.

North America Alfalfa Seed Market Trends

Rising cattle populations, growing demand from the processed forage industry and government support, are leading to an increase in the cultivation area

- Alfalfa is one of the major crops cultivated in countries such as the United States and Canada due to the high demand from the feed processing industry to feed livestock, especially cattle. To meet this high demand for alfalfa-based feed, the area cultivated for alfalfa was 11.5 million hectares in 2022, which increased by 5.5% during 2017-2022. The crop accounted for 30% of the area used for the cultivation of forage crops in the region in 2022.?
- With an increase of 1.9% from 2017 to 2022 in North America's ruminant population, the number of buffaloes and cattle rose from 155.1 million to 158.6 million during the same period, which led to an increase in the demand for alfalfa and the area harvested in the region. Alfalfa is largely cultivated in Canada, with an area of 5 million ha in 2022, and the country had a regional area share of 93% in the same year. The area under alfalfa cultivation increased by 33% during 2017-2022 due to the increasing investments and support from the Canadian government to increase the production of feed for the livestock industry. The area cultivated increased by 1.4% in the United States during 2021-2022 due to increased demand for high protein in animal feed and its important role in biological nitrogen fixation and improving the soil content.
- Due to the increasing livestock population and rising demand for dairy products, the cultivation area has been increasing. Government support and its important role in a high-protein diet for animals are the factors that may increase the area under cultivation for alfalfa during the forecast period.

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The adoption of disease-resistant, insect-resistant, and drought-resistant alfalfa seeds for high yield during adverse climatic conditions is rising

- Alfalfa is a major forage crop cultivated in North America. The high-demand traits of alfalfa are disease resistance, insect resistance, and wider adaptability for improving the quality of the feed/silage for the livestock industry. Wider adaptability was the largest trait adopted by growers as there have been changes in weather conditions and demand for high yields with early maturity. Furthermore, other traits such as increasing protein content, growing throughout the seasons, and reducing lignin content are expected to gain popularity in the future, increasing forage quality.
- Popular traits of Alfalfa include disease resistance to wilts and root rots, wider adaptability to different seasons and soil conditions, drought tolerance, and resistance to insects and nematodes. For instance, major companies offering and marketing the traits of alfalfa varieties are Ampac Seed Company (Attention II), KWS SAAT SE & Co. KGaG (HarvXtra, Standfast), Bayer Crop Science (Roundup-Ready), Syngenta AG (NEXGROW), and DLF (Fortune) for resistance to diseases such as Colletotrichum trifolii and Verticillium wilt.
- Drought tolerance is the second-most popular trait among growers, as states such as Nebraska, Kansas, Oklahoma, Texas, New Mexico, and Oregon have been experiencing severe drought since 2022. About 12% of the land in these states was experiencing extreme drought in 2023. Therefore, the drought-tolerant trait is expected to gain popularity during the forecast period.
- Factors such as the increased demand for improving animal feed and a large number of benefits such as resistance to diseases and increasing yield are expected to drive the market's growth in the region.

North America Alfalfa Seed Industry Overview

The North America Alfalfa Seed Market is moderately consolidated, with the top five companies occupying 55.73%. The major players in this market are Bayer AG, Corteva Agriscience, DLF, 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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