

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

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Report description:

The North America Seed Market size is estimated at 27.13 billion USD in 2025, and is expected to reach 36.98 billion USD by 2030, growing at a CAGR of 6.39% during the forecast period (2025-2030).

Advancements in plant breeding techniques and growing investments by key players in the market for improved varieties are estimated to drive the market

- In North America, the hybrid seed segment dominated the markets in terms of volume and value. It accounted for 81.4% of the total seed market value in 2022. This is because hybrid seeds include superior traits such as higher yields, improved disease resistance, and consistent performance, meeting the demands of modern agriculture.
- The market value of the hybrid segment increased by 27.2% between 2017 and 2021 due to advancements in plant breeding techniques, allowing the development of new plant varieties with desired traits by modifying the DNA of the seeds and plant cells. These innovative traits drive the sales of hybrid seeds in the region.
- Open-pollinated varieties require fewer inputs and are less expensive and more affordable for low-income farmers. As a result, in 2022, they were valued at USD 4.23 billion.
- The companies are heavily investing in new plant technologies due to the increasing demand for advanced, improved varieties. For instance, in 2022, Bayer AG opened its new canola seed production site in Cranbrook, B.C. This site manages Bayer's canola pre-foundation, foundation, and experimental plot seed operations for Canada and Chile.
- Wheat is the largest cultivated crop among all the crops, with open-pollinated varieties accounting for 29.3% of the total open-pollinated varieties and value share of hybrid derivatives in 2022. The advantages of open-pollinated varieties and derivatives include being well adapted to the local environment, allowing them to grow stronger, and requiring fewer inputs.

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- The advancements in plant breeding techniques and integration of superior traits, such as higher yields and improved disease resistance in hybrid seeds, are estimated to drive the market's growth during the forecast period.

The United States dominated the North American seed market due to higher area and higher usage of commercial hybrids

- In 2022, North America was the major leading seed market, accounting for 34.5% of the global seed market in terms of value. In the region, the United States was the largest seed market, and it had a market share of 76.2% in 2022, followed by Canada and Mexico.
- In 2022, row crops in the United States accounted for 36.1% of the global row crop seed market, and vegetable crops accounted for 22.8% of the global vegetable seed market. This was due to the larger area under cultivation and higher usage of commercial seeds.
- Canada is the second major seed market, accounting for 13.9% of the North American seed market in 2022. According to Statistics Canada, Ontario, Quebec, and British Columbia accounted for about 55.2%, 34.0%, and 3.1%, respectively, of vegetable production in 2022. The major vegetable crops grown in the country are tomato, green peas, carrot, green beans, onion, cabbage, and broccoli. Canada's protected cultivation areas include tomatoes, peppers, cucumbers, and lettuce.
- The cultivation of vegetable crops under protected conditions is booming in Mexico. Sinaloa accounted for the largest area under protected cultivation in 2022, followed by Jalisco with 3,310 ha, Baja California with 2,647 ha, Mexico with 1,624 ha, Chihuahua with 1,496 ha, Sonora with 1,175 ha, and Puebla with 1,045 ha. Majorly grown vegetables in protected cultivation are tomatoes, bell peppers, and cucurbits.
- The increase in the hybridization by seed companies, the increased investments, especially in Mexico, which is the largest importer of hybrid seeds, and the North America Free Trade Agreement facilitating imports and exports among North American countries are expected to boost the market significantly during the forecast period.

North America Seed Market Trends

The United States accounted for the largest area under cultivation land in North America due to the availability of vast areas of arable land and favorable government policies

- The North American agricultural land is characterized by its vast area of arable land, diverse climatic zones, and advanced farming techniques. The cultivation of row crops plays a major role in meeting the region's increasing demand for food, feed, and industrial raw materials. The region not only produces for domestic consumption but also contributes significantly to global agricultural trade. As a result, the total acreage of row crops in the region increased by 0.5% between 2017 and 2022, reaching 131.9 million ha. The United States is the largest agricultural producer in North America. It has a total agricultural land area of over 113.9 million ha, with around 112.7 million ha used for row crops in 2022. This is because the country's agricultural policies, including subsidies and support programs, encouraged large-scale farming.
- In 2022, corn accounted for the major share of 34.6% of the North American row crops acreage. This is because the climate in many parts of North America, particularly the Midwest region of the United States, is highly suitable for corn cultivation. Additionally, the stability of the corn market, combined with its consistent demand, makes it an attractive option for many North American farmers. As a result, the acreage for corn is estimated to reach 52.1 million ha in 2030.
- Soybeans accounted for the second largest acreage in North America, with a share of 28.5% of the overall region's row crop cultivation area in 2022. This is because of the high demand for soybeans in the region from processing industries to make soybean oil, tofu, soy milk, and protein isolates, providing a stable market for growers. The favorable government policies and

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stable demand for row crops in the domestic market are estimated to drive the acreage in the region.

North America Seed Industry Overview

The North America Seed Market is fairly consolidated, with the top five companies occupying 70.60%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Land O'Lakes Inc. and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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