

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

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Report description:

The Onion Seed Market size is estimated at 495.3 million USD in 2025, and is expected to reach 626.6 million USD by 2030, growing at a CAGR of 4.81% during the forecast period (2025-2030).

Hybrids occupied a higher share of the market owing to their importance in giving higher yields and wider adaptability

- Globally, the onion seed market is dominated by hybrids, whose value is growing consistently in the forecast period.
- The hybrid onion seed market was more popular than the open-pollinated varieties and hybrid derivatives in all the regions of the world. Europe was the largest region, which accounted for 31.9% of the global onion seed market in 2022.
- In 2022, North America was the second-largest onion seed market in the world. The United States and Canada are the largest countries in the region, where 98% and 97% of their respective market were occupied by hybrid seeds in 2022.
- However, Asia-Pacific was the largest region in the world with respect to the OPVs in the cultivation of onion, which accounted for 52% of the global OPV onion seed market in 2022. It is associated with an increase in the usage of OPVs in developing countries and the preference for their taste and quality over hybrids.
- India was the largest country in the world with respect to the OPVs' onion seed market, which accounted for 29.3% of the global OPVs' onion seed market in 2022. The high hybrid costs and consumer preferences are the major drivers for OPVs in the country. However, Poland is the fastest-growing country with respect to OPVs, which is growing at a rate of 9.9% in the forecast period.
- The increases in the demand for onions in all countries, the availability of high-yielding varieties in respective countries, and lower prices of OPVs are estimated to drive the OPVs faster in the global onion seed market with a CAGR of 5.1% during the forecast period, whereas, hybrids are registering a CAGR of 4.8% during the forecast period.

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Europe dominated the onion seed market with higher usage of hybrid varieties. Increasing area under onion cultivation is driving the market

- The onion seed segment accounted for 5.6% of the global vegetable seed market in 2022. The market value increased by 38.8% between 2017 and 2022 due to the global demand for consumption and usage in different cuisines.
- In 2022, Europe accounted for 31.9% of the global onion seed market value due to the importance of onions in daily meals and the increase in the export value of the crop.
- North America is the second-largest producer in the global onion seed market, accounting for 23.3% of the market in 2022. The high share of North America in the seed market is due to the region's high seed replacement rate and usage of hybrids. In 2022, the United States was the largest country in the global onion seed market, accounting for 11.5% of the market due to increased demand for consumption and households.
- In the United States, hybrid onion seed varieties are used more than OPVs, making it the largest onion seed market in terms of value. In other large onion-producing countries, such as China and India, onion hybrid seeds accounted for 45.2% and 56.6%, respectively, in 2022.
- North America is the fastest-growing region in the global onion seed market, estimated to register a CAGR of 4.6% during the forecast period due to increased demand and consumption in the United States and Mexico.
- An increase in the market value, increased demand from the processing industries, an increase in the usage of high-yielding varieties, and the application in different industries such as oil and pharmaceuticals boost the global onion seed market, which is estimated to register a CAGR of 4.8% during the forecast period.

Global Onion Seed Market Trends

Higher returns for onion and the availability of hybrid varieties are estimated to drive the onion cultivation, especially in Africa and Asia-Pacific

- Onion is the second most popular vegetable grown globally. The global onion acreage observed an increase of 13.7% from 2017, reaching 6.1 million hectares in 2022, with Asia-Pacific being the major region with the highest cultivated acreage (3.8 million hectares), which accounted for 62.7% of the global onion acreage in 2022.
- In the Asia-Pacific, India and China are the significant countries for onion cultivation, with 1.7 million ha and 1.1 million ha of area, respectively, contributing to 43.3% and 29.8% in 2022. Furthermore, India and China are the largest onion producers globally. The onion acreage declined in India in 2018 and 2019 due to the late arrival of monsoons. However, the acreage is estimated to increase with the government initiatives for higher returns such as Minimum Export Price during hard times, imposition of stock limit on onion traders, ban on exports driving the domestic trade, etc.
- Africa was the second largest region with a share of 23.7% in 2022. The cultivated area in Africa increased by 22.6% from 2017 to 2022 due to the increase in acreage in Kenya, Egypt, and Nigeria during the same period. Kenya has grown onion acreage substantially by 408.5% from 2017 to 2022. The increase is attributed to the adoption of hybrids in cultivation with support from the government of Kenya, such as adopting technologies, innovations, and management practices (TIMPs) to improve the onion value chain.
- Therefore, onion is majorly produced in these regions due to the favorable climatic conditions and higher returns for farmers from international and domestic markets, as it is one of the most consumed vegetables.

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Increasing demand for onion seed varieties resistant to the pink root disease

- Globally, the onion seed market is one of the largest and most consumed vegetable seeds. The increasing demand for onions from consumers has increased the market for onions. Therefore, the need for consistent quality and increased productivity has been improved, and several traits, such as disease resistance, quality attributes, and wider adaptability, are incorporated for efficient performance in the field.
- The major trait in demand from the growers of different countries is disease resistance for pink root disease, fusarium basal rot, and downy mildew to fetch more prices. In India and China, varieties with disease resistance to purple blotch are widely cultivated. For instance, in 2021, Bejo and De Groot en Slot launched the first Downy Mildew resistant shallot from the Seed Innovator. Companies such as Groupe Limagrain and Bayer AG also offer traits resistant to pink root rot and fusarium basal rot.
- The major seed companies, such as Bayer AG, BASF SE, Groupe Limagrain, East-West Seeds, Sakata Seeds Corporation, and Bejo Zaden BV, are developing varieties with a focus on high-yield, long-day storage, attractive colors (either red or white), early or late maturity and wider adaptability traits. Combining multiple disease-resistant traits with quality attributes such as size and color has gained popularity to earn higher profits.
- Benefits such as high-quality onions with high disease resistance, increased shelf life, and product innovations with quality attribute traits are helping to increase the demand for these seeds during the forecast period.

Onion Seed Industry Overview

The Onion Seed Market is moderately consolidated, with the top five companies occupying 42.10%. The major players in this market are BASF SE, Bayer AG, Bejo Zaden BV, Groupe Limagrain and Sakata Seeds Corporation (sorted alphabetically).

Additional Benefits:

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

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