

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

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Report description:

The Rice Seed Market size is estimated at 6.09 billion USD in 2025, and is expected to reach 7.33 billion USD by 2030, growing at a CAGR of 3.77% during the forecast period (2025-2030).

Asia-Pacific is the largest producer of rice with higher adoption of GM seeds in the Philippines and China, which will help in driving the sales of improved seed varieties

- In 2022, rice seed accounted for 9.3% of the global row crops seed market. Rice is the staple food consumed in many countries, such as India, China, and the Philippines, with high demand for consumption throughout the year.
- Globally, hybrids accounted for 35.4% of the market in 2022, whereas OPVs accounted for 64.6% in the same period due to the inferior grain quality of rice and the high input requirements of hybrids.
- Asia-Pacific was the largest region by rice production, and its seed market accounted for 74.3% of the global market in 2022. The increasing demand for consumption with the development of new rice varieties and higher cultivation areas is driving the market in the region. China was the largest adopter of hybrid rice seeds, and the country had the largest hybrid rice seed market in 2022, which accounted for 54.6% of the hybrid segment. Moreover, the demand for higher resistance to diseases and wider adaptability are driving the demand for hybrid seeds in the global market.
- In 2022, herbicide-tolerant rice seeds had a market share of 14%. The United States approved the most herbicide-tolerant rice seeds because the government was encouraging the introduction of more GM crops. Other traits are emerging as the Philippines approved the cultivation of golden rice in the country.
- China, which produces rice using insect-resistant transgenic hybrids, accounted for 100% of the global insect-resistant segment due to the availability of these seed varieties with resistance to insects as they help reduce crop loss by 80%-90%.

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- The increase in the concerns for productivity and the demand for consumption and self-sufficiency is expected to drive the rice seed market with a CAGR of 3.8% during the forecast period.

Asia-Pacific dominated the global rice seed market as rice is the staple food in the region and is produced in large quantities

- The rice seed market accounted for 8.3% of the global seed market value in 2022. The market value increased by 18.1% between 2017 to 2022. Asia-Pacific held about 74.3% of the global rice seed market in 2022, as rice is the staple food in the region and is produced in large quantities. Globally, the largest rice-producing countries are China, India, Indonesia, and Bangladesh.
- In 2022, China and India accounted for about 37.6% of the global rice seed market due to high consumption (about 65% of the population consumes rice in these countries) and increased rice production using hybrid seeds. Therefore, the demand for rice seeds is anticipated to increase further during the forecast period.
- The commercially cultivated area for rice in India increased by 7.0% between 2017 and 2022, as about 60% of the population in the country consumes rice. It is also a leading producer of rice and caters to global demand. Thus, the demand for rice seeds is likely to increase during the forecast period.
- The demand for hybrid seeds for rice is anticipated to increase during the forecast period due to continuous research activities to produce different hybrid seed varieties for rice. For instance, in 2018, the United States approved the production of golden hybrid rice.
- Rice production in North America was 8.0 million metric ton in 2017, which reached more than 8.7 million metric ton in 2021. The increased demand for American rice in developing countries and approvals for GM rice seed varieties are projected to boost the growth of the North American rice seed market during the forecast period.
- Thus, due to the increased production and demand for rice, the segment is estimated to experience steady growth during the forecast period.

Global Rice Seed Market Trends

Asia-Pacific was the major region in the world concerning rice acreage, with Africa having higher growth potential with support from the government

- Rice is the major staple food for almost two-thirds of the world's population. In 2022, globally, the acreage under rice cultivation was 165.3 million hectares, with Asia-Pacific being the region with the highest cultivated acreage (143.2 million hectares), which accounted for 87.6% of the global acreage in 2022. In Asia-Pacific, India and China were the top countries with the highest cultivated areas, with 46.8 million hectares and 30.4 million hectares, respectively, in 2022. The higher acreage was because of the age-old consumption of rice as a staple food in these countries and the initiatives of respective governments to meet the demand for their growing populations. However, Australia has observed a substantial decline in 2019 by 87.5% compared to 2018 due to lower water availability and higher water prices.
- Africa is the second-largest region for rice production, and it accounted for 9.8% of the global rice acreage in 2022. Nigeria was the major country, which accounted for 27.3% of the area under rice cultivation in the region in 2022, followed by Tanzania with 6.04% of the acreage. The acreage is estimated to increase with the government initiatives. For instance, the 10-year National Rice Development Strategy Phase II (NRDS-II) program is estimated to double the area under rice cultivation in the country. However, in 2022, South America held 2.6% of the global rice acreage, whereas North America and Europe were the other major regions, which accounted for 0.8% and 0.5%, respectively.

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- Therefore, with the increase in the demand for rice as a staple food, government initiatives in developing countries to meet the domestic demand are estimated to drive the global rice acreage during the forecast period.

The demand for rice seeds with improved traits, such as disease resistance, drought tolerance, and wider adaptability to different regions to reduce yield loss, is driving the demand for improved varieties

- Rice is a staple food in Asia-Pacific because it is consumed as a meal once daily. China and India are major rice producers globally, and drought tolerance is one of the major traits produced by seed companies as there have been changes in the climatic conditions, which has led to high demand for this seed variety by the growers. For instance, in 2022, China suffered drier conditions than normal rainfall conditions, which is expected to help increase the demand for drought-tolerant seed varieties as well as wider adaptability traits. Moreover, Nuziveedu Seeds launched 4 new products, NP-7373, NA 9153 Pushkal, NSL Annapurna, and NP-9359 Sandhya in 2023, and Corteva Agriscience launched a brand Brevant for India in 2020, and it contains traits such as wider adaptability and drought tolerance.

- Furthermore, there is a high demand for seeds resistant to diseases such as seedling blight, grain rot, and other bacterial diseases. For instance, brands such as Bayer AG's Arize Tej Gold, Advanta Seeds' PAC 8744, and Vina Seed's Thein Uu8 provide resistance to different diseases such as blast, seeding blight, and sheath blight. Furthermore, the crop is affected by biotic stresses and different pests such as Tryporyza incertulas and Gundhi bugs. Additionally, in North America, white spot diseases, gray leaf spots, common rust, goss wilt, and Anthracnose stalk rot diseases are affecting the growth of rice crops, and it has increased the demand for disease-resistant traits in the region, especially the United States.

- An increase in new varieties developed to meet the demand for rice seeds and conventional hybrids replaced by advanced traits, such as disease resistance and drought tolerance, are expected to help the growth of the market during the forecast period.

Rice Seed Industry Overview

The Rice Seed Market is fragmented, with the top five companies occupying 29.45%. The major players in this market are Advanta Seeds - UPL, Bayer AG, Corteva Agriscience, SL Agritech Corporation (SLAC) and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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