

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

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Report description:

The Russia Seed Market size is estimated at 1.83 billion USD in 2025, and is expected to reach 2.73 billion USD by 2030, growing at a CAGR of 8.41% during the forecast period (2025-2030).

Hybrids dominate the Russian seed market due to the extensive cultivation of hybrid varieties, aimed at preventing yield loss caused by pests and diseases in the region

- The hybrid seed segment accounted for a major share of the Russian seed market, accounting for a value of USD 1.11 billion in 2022 because most Russian farmers use hybrids for vegetables and row crops to increase production and yield.
- In row crops, open-pollinated varieties (OPVs) accounted for 30.4% of the row crops seed market's value, whereas in vegetables, OPVs accounted for 9.4% of the vegetable seed market value in 2022. However, the increase in protected farming of vegetables and the rising usage of hybrids are resulting in a decrease in open-pollinated varieties.
- Under hybrids, corn accounted for a major share of 28.5% of the market in 2022 due to a large area being cultivated with hybrid seeds. The continuous expansion of the planting area under these crops is fueling the growth of the market.
- In vegetable seeds, the hybrid segment accounted for a 90.5% share in 2022; unclassified vegetables accounted for 71.6%. This is because hybrids displayed a higher degree of uniformity in these crops in terms of traits like size, shape, and color.
- The yield of some major crops in Russia is significantly decreasing. Diseases, unfavorable environments, and drought in some parts of the country caused massive reductions in crop yields in a few years. Sorghum yield accounted for 10,583 hg/ha in 2021, a decrease of 19% from 2020. To compensate for yield losses in the future, Russian farmers need to adopt varieties that are more robust and adaptable to local conditions.
- Non-transgenic hybrids in the hybrid segment dominate the market because of the ban on GMO crops in the country. The

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demand for non-transgenic seeds in the hybrid segment is expected to increase, registering a CAGR of 8.9% during the forecast period.

Russia Seed Market Trends

The high export potential of row crops combined with the government initiatives to promote agricultural production driving the row crop area.

- In Russia, row crops dominated the total cultivated acreage, which accounted for about 95.1% of the total cultivated area in 2022. The primary row crops cultivated in the country include wheat, corn, sunflower, soybean, and other grains and cereals. In 2022, grains and cereals dominated the row crop acreage with a significant share of about 68.0%. This domination of grains and cereals is due to their substantial production output within the country. For instance, Russia is the world's leading wheat exporter, with an export volume of 45.5 million ton in 2022.
- The overall row crop acreage increased by about 6.7% between 2017 and 2022. It is anticipated to increase by about 19.9% by the end of the forecast period. This is due to the growing demand for row crops in the country. Moreover, the Russian government announced a USD 51 billion plan in 2018. This plan boosts domestic agricultural production, setting the ambitious goal of increasing food exports by 70% by 2024. This plan is anticipated to boost the overall row crop cultivation area as row crops are the primary export commodities from the country.
- Russia is the world's second-largest producer of sunflower seeds; the overall sunflower acreage accounted for about 16.0% of the total row crops cultivated area in 2022. The growing demand for oilseeds and their higher export potential are anticipated to drive the cultivation area of sunflowers during the forecast period.
- The country's large cultivation area of row crops, combined with the high export potential and government initiatives to increase agriculture production, is anticipated to drive the cultivation area of row crops in the country during the forecast period.

Alfalfa varieties with high protein, disease-resistance traits, and forage corn with early maturity and wider adaptability traits fueling the growth of the market

- Alfalfa and forage corn are the primary forage crops cultivated in Russia due to their importance as animal feed. Russian farmers are interested in growing disease-resistant alfalfa and forage corn to mitigate yield losses caused by diseases like *Colletotrichum tritici*, anthracnose, *Verticillium* wilts, and nematodes. As a result, companies such as Barenbrug, Euralis Semences, Limagrain, DLF, and KWS Saat are providing such varieties to offer disease resistance.
- Alfalfa with high protein content is the other major trait that farmers in the country largely prefer. The production of high-protein feed is the basis for the sustainable development of livestock. Due to the lack of fodder protein, the productivity of animals decreases, and the cost of production increases. Hence, it is highly important in livestock rearing in the country.??
- Similarly, the production of alfalfa and forage corn is challenged by adverse climatic factors, such as drought and other stresses. The drought-resistant varieties are important for enhancing forage productivity. Therefore, these varieties are witnessing high demand because of the unavailability of irrigation water, frequent drought, and other major harsh conditions.??
- Forage corn with high-yield protein, early maturity, and high starch content traits is experiencing high demand. In Russia,

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Limagrains company developed forage corn varieties with these traits to help growers achieve higher productivity, increasing the animal feed's nutritional value.??? Therefore, the seeds with traits such as disease resistance and wider adaptability that help prevent losses from biotic and abiotic stresses and increase productivity are fueling the growth of the market.???

Russia Seed Industry Overview

The Russia Seed Market is fragmented, with the top five companies occupying 18.61%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Groupe Limagrains and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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