

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

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Report description:

The South America Seed Treatment Market size is estimated at 2.39 billion USD in 2025, and is expected to reach 2.9 billion USD by 2030, growing at a CAGR of 4.01% during the forecast period (2025-2030).

The need to improve productivity and establish healthy seedlings is fueling the growth of the market

- The South American seed treatment industry is experiencing significant growth. The market value increased by 51.7% in 2022 compared to 2017. This growth was driven by growing awareness of the benefits of seed-applied technologies in protecting and establishing healthy seedlings and the need to improve overall productivity.
- Brazil and Argentina are prominent agricultural nations that heavily utilize seed treatments to protect their crops from a range of fungal diseases. The combined market share of seed treatments in Brazil and Argentina is significant, with Brazil accounting for 77.9% and Argentina accounting for around 3.1% of the regional market.
- The insecticide seed treatments held the major share, and their market value is expected to increase significantly by 35.3% between 2023 and 2029 because of the growing recognition of the effectiveness of seed treatments in combatting insect vectors and safeguarding crop productivity.
- Fungicide seed treatment in South America has gained significant importance in recent years due to the prevalence of fungal diseases that affect key crops like soybeans, corn, wheat, and fruits. These diseases, including soybean rust, powdery mildew, and Fusarium head blight, pose a significant risk to crop yields and quality. Consequently, farmers in South America are increasingly relying on fungicide seed treatments to safeguard their crops and reduce yield losses. These factors are expected to increase the market value of the fungicide segment by 33.6% during the forecast period.
- The growing acceptance of seed treatment to enhance crop protection and yield, coupled with the increasing awareness among

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farmers regarding its advantages, is anticipated to drive the market's growth in the forecast period.

The need to protect seeds and seedlings from early-growth pests and diseases will increase the adoption rate of seed treatment

- The seed treatment market in South America is experiencing significant growth, driven by the increasing awareness among farmers regarding the need to protect seeds and seedlings from early crop diseases and insect pests. The region's major crops, including soybean, maize, wheat, fruits, and vegetables, have embraced seed treatment applications. Notably, the market for seed treatment exhibited impressive growth of 51.7% over the historical period spanning from 2017 to 2022.
- In 2022, Brazil held the dominant position as the largest market in South America, representing 77.9% of the region's market share. The country's remarkable expansion can be attributed to several factors, including the growing need for food security and the escalating utilization of seed treatment products in key crops like soybeans.
- Argentina, the second-largest market in the South American seed treatment industry, experiences challenging environmental conditions such as drought and hot temperatures. These factors drove farmers to adopt seed treatment techniques during the early stages of crop growth. By employing seed treatment methods, farmers can promote faster germination and effectively control soil-borne diseases. This approach proves crucial in mitigating the adverse effects of the country's harsh climate, enabling farmers to enhance crop yields and sustainably maintain agricultural productivity.
- The South American seed treatment market is projected to register a CAGR of 4.3% during the forecast period. This growth can be attributed to the increasing recognition among farmers regarding the immense value offered by seed treatments in safeguarding their crops, enhancing yields, and countering early crop growth challenges posed by infestations.

South America Seed Treatment Market Trends

Alternative approaches like disease-resistant cultivators reduce the seed treatment consumption per hectare in the region

- Over the historical period, there was a remarkable decrease in the consumption of seed treatments per hectare, with a significant reduction of 1,000 g per ha noted in 2022 when compared to the data from 2017. This decline was primarily attributed to various factors, including one of the pivotal reasons contributing to the decline in seed treatment usage is the increasing adoption of herbicide-resistant cultivators. These cultivators are genetically engineered to withstand the application of herbicides, allowing farmers to control weeds without the need for additional seed treatments. As a result, the demand for conventional seed treatments has reduced. Major agricultural countries like Brazil, Argentina, and Paraguay adopt these herbicide resistance cultivators in their major crops like soybeans, wheat, and maize.
- In addition to herbicide resistance, the widespread cultivation of genetically modified crops has significantly impacted seed treatment consumption. Genetically modified crops are engineered to possess built-in traits that offer resistance to various pests and diseases, rendering some seed treatments unnecessary for these crops. Consequently, farmers planting genetically modified crops have reduced their reliance on traditional seed treatments.
- Another crucial factor contributing to the decline in seed treatment consumption per hectare is the adoption of disease-resistant cultivators. These cultivators have been bred or engineered to resist common plant diseases, thereby reducing the need for disease-specific seed treatments. As more farmers adopt disease-resistant cultivators, the overall demand for certain types of seed treatment usage per hectare has decreased significantly.

Azoxystrobin's systemic activity allows it to be absorbed by treated plants, providing extended protection

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- Cypermethrin, metalaxyl, malathion, abamectin, and azoxystrobin are commonly used active ingredients in seed treatment chemicals in South America. Seed treatment provides early protection to seeds and seedlings against pests and diseases. It creates a protective barrier around the seed, shielding it from potential threats as soon as it is sown in the soil.
- Cypermethrin, as a contact insecticide, remained primarily on the surface of treated seeds or plants, forming a protective barrier for quick knockdown action against a wide range of insect pests. It was priced at USD 21.1 thousand per metric ton in 2022. The mode of action of cypermethrin involves disrupting the nervous systems of insects, leading to paralysis and, ultimately, their death.
- Malathion's systemic action enabled effective control of diverse insect pests, including aphids, leafhoppers, thrips, scales, and certain caterpillar species, with a price of USD 124 thousand per metric ton in 2022. Malathion's mode of action involves inhibiting acetylcholinesterase, an enzyme essential for proper nerve function in insects.
- Metalaxyl, priced at USD 4.4 thousand per metric ton in 2022, provided early protection to seeds and seedlings from soil-borne pathogens such as Pythium, Phytophthora, and certain downy mildews. Metalaxyl works by inhibiting the formation of RNA in fungal cells. This disruption prevents the synthesis of essential proteins, leading to the inhibition of fungal growth and reproduction
- With a price of USD 4.5 thousand per metric ton in 2022, azoxystrobin's systemic activity allowed it to be absorbed by treated plants, providing extended protection to different plant parts, including new growth and foliage, by inhibiting the mitochondrial respiration in fungal cells.

South America Seed Treatment Industry Overview

The South America Seed Treatment Market is fairly consolidated, with the top five companies occupying 65.66%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, FMC Corporation and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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