

## **Southeast Asia Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Southeast Asia Seed Market size is estimated at 3.4 billion USD in 2025, and is expected to reach 4.19 billion USD by 2030, growing at a CAGR of 4.29% during the forecast period (2025-2030).

Open-pollinated varieties dominated the seed market due to higher area under rice cultivation in the region

- In Southeast Asia, open-pollinated varieties dominated the seed market, which accounted for 56.6% share in 2022. In 2022, out of the total open-pollinated seed market value, row crops accounted for 94.2% of the share, whereas vegetables accounted for 5.8% of the share. The high share of row crops is mainly due to the higher area under rice cultivation, where open-pollinated varieties are mainly cultivated in the region.
- The open-pollinated varieties require fewer inputs, such as fertilizer and pesticides, and are less expensive and more affordable for low-income farmers, reducing the reliance on hybrid seed imports. These factors are projected to drive the market during the forecast period.
- In 2022, hybrids accounted for a 43.4% share of the region's seed market. Hybrids have higher productivity, wider adaptability, and a high degree of resistance to biotic and abiotic stresses. For instance, in cotton, hybrids give 50% more yield than conventional varieties. The wider adaptability of hybrids is mainly due to their high buffering capacity to environmental fluctuations.
- The demand for organic produce is increasing primarily due to the health benefits, chemical usage avoidance, and the changing patterns of lifestyle and food consumption among people. Therefore, the demand for non-transgenic hybrids and open-pollinated seed varieties is expected to increase during the forecast period.
- In 2022, transgenic hybrids accounted for 6.9% share of the hybrid seed market. Among transgenic seeds, insect-resistant

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transgenic hybrids dominated the transgenic seed market as they have a share of 87.8% in 2022.

- Factors such as high resistance to diseases, biotic stresses, and demand for organic produce will help drive the commercial seed market in the forecast period. ?

Indonesia dominated the region's seed market due to higher area under cultivation and the rise in the usage of commercial seeds

- In 2022, Southeast Asia accounted for 14.3% of the Asia-Pacific seed market, which increased by 22.1% between 2017 and 2022. This is due to the higher adoption of commercial seeds, including hybrids, to meet the production demand in the region.
- In Southeast Asia, Indonesia dominated the seed market, accounting for a 25.9% share in 2022. The area harvested under grains and cereals in Indonesia was 6.1 million hectares in 2022. Corn is an important grain crop cultivated in the country, with an area of 3.3 million ha in 2022. The demand for corn is estimated to increase during the forecast period due to the growing demand from processing industries.
- The Philippines is one of the major seed markets in the region, which accounted for USD 759.6 million in 2022. The Philippines seed market was dominated by row crops, which accounted for 92.2%, and vegetable crops accounted for about 7.8% in terms of value in 2022. Row crops such as rice and corn are preferred in the country due to the suitable soil and climatic conditions and high marginal profits.
- In 2022, Thailand accounted for a 21.1% share of the Southeast Asian seed market. Rice is the major crop cultivated in the country. It accounted for 74.1% of the total cultivated area of cereals in the country in 2022. Rice seeds accounted for 66.1% of the country's seed market value in 2022. Rice seeds are the most demanded and widely produced in the country. Other major countries in the region are Vietnam and Myanmar, which accounted for an 18.0% share of the region's seed market in 2022.
- The increasing production and population, higher adoption of commercial seeds, and the demand from the processing industry are anticipated to boost seed segments in the Southeast countries during the forecast period.???

#### Southeast Asia Seed Market Trends

Southeast Asia experiences increasing demand for cereals and oilseeds driven by the demand from livestock and feed industry

- In Southeast Asia, row crops are the major crop types cultivated to a large extent due to the increasing demand for food, feed, and industrial raw materials. In 2022, they accounted for 89.3% of the total area under crops in the region. The area showed a decline in 2019 due to adverse climatic conditions, and irregular rain patterns drove the decrease. However, the area increased by 0.3% between 2020 and 2022 to meet the rising demand.
- Cereal crops in the region cover the major area under cultivation. The area under cereals in 2022 accounted for 55.9 million hectares, in which rice held the largest cultivating area due to the high domestic demand for consumption as a staple food.
- In Vietnam, the total area harvested for rice accounted for 7.3 million ha in 2022, and the total production was reported at 42.8 million metric ton in 2021. According to USDA, due to population growth, the country needs an additional 150-200 thousand metric ton of rice every year to meet the domestic demand. This factor is expected to increase the sowing area under rice cultivation in the country.
- The oilseed acreage increased by 0.7% to 10.7 million hectares in 2022 from 2021. The increase in the area is due to increased demand from the livestock feed sector and reasonable prices in the domestic market. Among oilseeds, soybean is the major crop, which accounted for 550.9 thousand hectares in 2022.
- Pulses are among the major crops cultivated in the region, which were grown under an area of 4.5 million hectares in 2022. The cultivation of pulses is expected to increase due to growing demand for consumption due to awareness about protein-rich food.

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Cabbage, pumpkin and squash are vital vegetable crops in Southeast Asia, with a rising demand for disease resistant and quality attributes varieties to meet the higher consumer demand

- Cabbage is one of the most important vegetable crops in Southeast Asia. Different types of cabbages grown in the region are Vietnamese cabbages, Chinese cabbages, and Bak Choy.?? Varieties with disease tolerance (Alternaria leaf blight, wilts, and rots), quality traits such as the size of the head, the color of head leaves, the shape of the head, and other traits such as pest resistance and wider adaptability are the major traits widely adopted. Additionally, the size of heads and head weight are the major traits that have a significant demand, as they help in increasing yield productivity per hectare.?? Companies such as Limagrain and Rijk Zwaan are providing cabbage seeds with these traits to grow in adverse weather conditions with high quality.
- Pumpkin and squash are the major cucurbits widely grown in the region. The popular traits of the crop are quality attributes such as good shape, size, and color, longer storage life, disease resistance, especially against the geminin virus, and wider adaptability to different climatic and soil types. It is expected that in the future, disease resistance and quality attribute traits will be more widely available as companies develop new varieties with mildew tolerance and virus resistance, as well as uniformity, color, and flavor. Moreover, East-West Seed has varieties, such as 18880 F1 and Pujitha F1, which provide resistance to geminin and potyvirus in the crop. In the Philippines, Enza Zaden launched new seed varieties through a partnership with Vitalis Organic Seeds in 2021.
- Factors such as the introduction of new seed varieties with higher resistance to viruses, quality attributes, and high yield are expected to help in the growth of the vegetable seed market during the forecast period.

## Southeast Asia Seed Industry Overview

The Southeast Asia Seed Market is fragmented, with the top five companies occupying 7.58%. The major players in this market are Bayer AG, Charoen Pokphand Group (CP Group), Groupe Limagrain, Known You Seed Co. LTD and Syngenta Group (sorted alphabetically).

### Additional Benefits:

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

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