

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

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Report description:

The Soybean Seed Market size is estimated at 11.07 billion USD in 2025, and is expected to reach 15.05 billion USD by 2030, growing at a CAGR of 6.35% during the forecast period (2025-2030).

Hybrids dominate the global soybean seed market due to their ability to resist biotic and abiotic factors and provide higher yields

- In 2022, hybrid seeds had a higher share than open-pollinated seed varieties because hybrid seeds are drought-resistant and have wider adaptability to different regions and weather conditions.
- In 2022, the non-transgenic hybrid soybean seed market had a share of about 20.4% of the hybrid soybean market by value. The growing awareness among people about the benefits of consuming non-GMO food is driving the growth of the non-transgenic seed segment. Additionally, transgenic soybean cultivation is banned in Europe, which is also a significant driver for this segment.
- In 2022, North America held the largest share in the hybrid segment. It accounted for 46.6% of the region's soybean seed market by value because of the increasing sowing area under transgenic seeds and the high seed replacement rate compared to other regions.
- In the transgenic segment, Asia-Pacific is expected to be one of the fastest-growing regions during the forecast period, with an estimated CAGR of 3.9%. Herbicide-tolerant hybrids accounted for a significant share of 98.1% of the region's soybean transgenic seed market by value in 2022, which is expected to increase as the Chinese government is providing an incentive to increase production using herbicide-tolerant seeds.
- Globally, open-pollinated seed varieties are used less than hybrid seed varieties because OPVs are not resistant to diseases and can be attacked easily by biotic and abiotic factors. Therefore, growers use hybrid seed traits with improved characteristics to minimize crop loss due to weeds and insects and increase yield.

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- Therefore, the increasing effects of pests and diseases on crop losses and benefits such as higher yield and resistance to diseases are estimated to drive the hybrid seed segment at the fastest rate during the forecast period.

North America is the leading producer of soybeans, and the availability of new seed varieties, especially GM seeds, is driving the market

- North America is the leading producer of soybeans. The region accounted for 43.4% of the global soybean seed market in 2022. The United States is the leading producer of soybeans in the region, and there has been an overall increase in the cultivation area for soybeans in the region. For instance, the cultivation area in North America increased by 14.8% from 2019 to 2022 as growers preferred to cultivate soybeans compared to any other crop due to its high profits. These factors are anticipated to drive the region's soybean market at a CAGR of 6.6% during the forecast period.
- South America accounted for about 29.2% of the global soybean seed market in 2022, and it is projected to register a CAGR of 7.1% during the forecast period due to the increase in the adoption of hybrid seeds and cultivation areas and the availability of genetically modified crop seeds in South America. Moreover, the area under cultivation for soybeans in the region increased by 10.8% from 2017 to 2022 and 63.2 million hectares in 2022 due to the hybridization and approval of GM seeds in the two major countries of the region.
- Asia-Pacific accounted for about 19.3% of the market in 2022. China and India were the major soybean-producing countries in the region. Moreover, India was the leading producer of soybeans in the world, as it accounted for 2.7% in 2022, with a cultivation area of 12.3 million hectares in the same year. With growing demand for soybeans from various industries, the region's soybean market is anticipated to register a CAGR of 4.0% during the forecast period.
- The growing cultivation area of soybeans across different regions, the availability of new and improved seed varieties, and the growing demand for soybeans are anticipated to drive the market during the forecast period.

Global Soybean Seed Market Trends

South America is the leading soybean-producing region, and Brazil and India are the major countries with the highest growth potential in the world

- Soybean is one of the major oilseed crops cultivated in the world. In 2022, soybean cultivation was spread over 132.1 million hectares, which accounted for 45.6% of the global oilseed acreage. The usage of soybean oil as a biofuel has increased the demand for soybeans as an alternative to petrochemical raw materials. South America is the leading producer, which accounted for 47.9% of the global area under soybean cultivation in 2022 and observed a consistent increase of 10.8% from 2017 to 2022. Brazil is the leading soybean producer, accounting for 30.6% of the global soybean acreage in 2022. Argentina is also one of the major countries where the acreage fluctuated during the historic period owing to climatic conditions such as drought. Moreover, soybean is an input-intensive crop demanding higher amounts of water, agrochemicals, and soil.
- North America was the second-largest region, with a majority of the acreage under soybean being concentrated in the United States, which accounted for 26.7% of the global soybean acreage in 2022. The demand from China's oilseed industries is driving the region's soybean market. In Asia-Pacific, 22 million hectares of soybeans were cultivated in 2022, which accounted for 16.7% of the global acreage. India was the major country in the region, accounting for 56.2% of the region's soybean acreage in 2022. The annual increase in MSP prices, announcing stock limits to control prices, and demand from oil seed mills and crushers are estimated to drive the soybean acreage in the country faster compared to other countries.
- Therefore, industrial applications of soybeans and government initiatives for favorable market prices are estimated to drive the

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soybean acreage in major producing countries.

The higher demand for soybeans from various industries drives the demand for seeds with insect-resistant, herbicide-tolerant, and disease-resistant traits to boost the yield

- Soybeans are majorly cultivated in countries such as the United States, Brazil, and China due to favorable weather conditions. Traits such as disease resistance, drought tolerance, and high yielding and high oleic content have been gaining popularity due to changes in the climate and soil conditions with high demand for soybean from oil processing companies and preventing southern-stem canker, root-knot nematode (RKN), and Phytophthora sojae. For instance, Land O' Lakes has seed varieties under the brand Enlist and Roundup Ready to meet the growing demand for improved seed varieties. Furthermore, other major companies such as Corteva Agriscience, KWS SAAT SE & Co. KGaA, Land O'Lakes, Burrus Seeds, and Syngenta AG offer these seed traits.
- Disease-resistant traits are widely used by growers, and resistance to Diaporthe, Phytophthora, Sclerotinia, and other diseases are very popular and widely cultivated. As these diseases cause significant yield losses during field conditions, resistant varieties avoid the diseases and increase their productivity.? For instance, PR91M10 by Corteva Agriscience and TMN Sinema by RAGT Group provide resistance to Diaporthe, Phytophthora, and Sclerotinia.
- Other traits, such as tolerance to drought, lodging, wider adaptability, early-medium maturity, tolerance to methyl herbicides, and tolerance to moisture stress, with high-yielding characteristics, are used globally.? The introduction of new hybrid seed varieties by companies with higher resistance to viruses and high demand by processing industries are the factors expected to help in the growth of the soybean seed market during the forecast period.

Soybean Seed Industry Overview

The Soybean Seed Market is moderately consolidated, with the top five companies occupying 63.46%. The major players in this market are Advanta Seeds - UPL, Bayer AG, Corteva Agriscience, KWS SAAT SE & Co. KGaA and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Area Under Cultivation

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- 4.2 Most Popular Traits
- 4.3 Breeding Techniques
- 4.4 Regulatory Framework
- 4.5 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD, Forecasts up to 2030 and analysis of growth prospects)

- 5.1 Breeding Technology
 - 5.1.1 Hybrids
 - 5.1.1.1 Non-Transgenic Hybrids
 - 5.1.1.2 Transgenic Hybrids
 - 5.1.1.2.1 Herbicide Tolerant Hybrids
 - 5.1.1.2.2 Insect Resistant Hybrids
 - 5.1.1.2.3 Other Traits
 - 5.1.2 Open Pollinated Varieties & Hybrid Derivatives
 - 5.2 Region
 - 5.2.1 Africa
 - 5.2.1.1 By Breeding Technology
 - 5.2.1.2 By Country
 - 5.2.1.2.1 Egypt
 - 5.2.1.2.2 Ethiopia
 - 5.2.1.2.3 Ghana
 - 5.2.1.2.4 Kenya
 - 5.2.1.2.5 Nigeria
 - 5.2.1.2.6 South Africa
 - 5.2.1.2.7 Tanzania
 - 5.2.1.2.8 Rest of Africa
 - 5.2.2 Asia-Pacific
 - 5.2.2.1 By Breeding Technology
 - 5.2.2.2 By Country
 - 5.2.2.2.1 Australia
 - 5.2.2.2.2 Bangladesh
 - 5.2.2.2.3 China
 - 5.2.2.2.4 India
 - 5.2.2.2.5 Indonesia
 - 5.2.2.2.6 Japan
 - 5.2.2.2.7 Myanmar
 - 5.2.2.2.8 Philippines
 - 5.2.2.2.9 Thailand
 - 5.2.2.2.10 Vietnam
 - 5.2.2.2.11 Rest of Asia-Pacific
 - 5.2.3 Europe
 - 5.2.3.1 By Breeding Technology
 - 5.2.3.2 By Country
 - 5.2.3.2.1 France
 - 5.2.3.2.2 Germany
 - 5.2.3.2.3 Italy
 - 5.2.3.2.4 Netherlands

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- 5.2.3.2.5 Poland
- 5.2.3.2.6 Romania
- 5.2.3.2.7 Russia
- 5.2.3.2.8 Spain
- 5.2.3.2.9 Turkey
- 5.2.3.2.10 Ukraine
- 5.2.3.2.11 United Kingdom
- 5.2.3.2.12 Rest of Europe
- 5.2.4 Middle East
 - 5.2.4.1 By Breeding Technology
 - 5.2.4.2 By Country
 - 5.2.4.2.1 Iran
 - 5.2.4.2.2 Rest of Middle East
- 5.2.5 North America
 - 5.2.5.1 By Breeding Technology
 - 5.2.5.2 By Country
 - 5.2.5.2.1 Canada
 - 5.2.5.2.2 Mexico
 - 5.2.5.2.3 United States
 - 5.2.5.2.4 Rest of North America
- 5.2.6 South America
 - 5.2.6.1 By Breeding Technology
 - 5.2.6.2 By Country
 - 5.2.6.2.1 Argentina
 - 5.2.6.2.2 Brazil
 - 5.2.6.2.3 Rest of South America

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Advanta Seeds - UPL
 - 6.4.2 Bayer AG
 - 6.4.3 Burrus Seed
 - 6.4.4 Corteva Agriscience
 - 6.4.5 Florimond Desprez
 - 6.4.6 KWS SAAT SE & Co. KGaA
 - 6.4.7 RAGT Group
 - 6.4.8 Syngenta Group
 - 6.4.9 Zambia Seed Company Limited (Zamseed)

7 KEY STRATEGIC QUESTIONS FOR SEEDS CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview

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- 8.1.2 Porter's Five Forces Framework
- 8.1.3 Global Value Chain Analysis
- 8.1.4 Global Market Size and DROs
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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