

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

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Report description:

The Thailand Seed Market size is estimated at 701.9 million USD in 2025, and is expected to reach 846.2 million USD by 2030, growing at a CAGR of 3.81% during the forecast period (2025-2030).

Open-pollinated varieties and hybrid derivatives dominate the market because major crops such as rice are mostly cultivated with OPV seeds due to easy availability

- In 2022, open-pollinated varieties and hybrid derivatives accounted for a major share of the Thai seed market, with 69.6%. The larger share was mainly due to the extensive area under rice cultivation, where open-pollinated varieties are most common.??
- In Thailand, hybrid seeds accounted for 30.4% of the seed market in 2022. Out of the total value of the hybrid seed market, row crops accounted for 80.3%, whereas vegetables accounted for 19.7% in 2022.?? The high share of vegetables was due to the increased demand for vegetables as a result of the growing population and increased health consciousness.
- During the forecast period, the grains and cereals segment is estimated to grow, registering a CAGR of 6.1%. As transgenic hybrids are not approved in the country, there is reliance on non-transgenic hybrid seeds to recover from lagging productivity and meet the production demand.???
- In Thailand, vegetables accounted for 1.7% of the market for open-pollinated varieties in 2022. Vegetables accounted for the minimum share due to the preference for high-yielding and disease-resistant hybrids.?? Among vegetables, major shares were held by cucumber and gherkins (15.9%), chili (15.3%), and onion (5%) in 2022, as these vegetables are highly valued in the country.
- In Thailand, the adoption of hybrids and improved open-pollinated varieties have resulted in many advantages, such as self-sufficiency in production, improvement in the quality of agricultural products, and stability in production. Such factors are

estimated to drive the growth of the country's seed market during the forecast period at a CAGR of 3.8%. ?? ??

Thailand Seed Market Trends

Increasing demand for row crops from crushers and millers and government incentives to promote certain crops are driving the cultivation of grains and cereals

- In Thailand, row crops cover the dominant crop area, which accounted for 87.3% of the overall cultivable land in 2022. The area under cultivation of row crops increased by 7.5% from 2017 to 2022, reaching 13.3 million hectares. However, the acreage decreased by 7.2% in 2019 compared to 2018 from 12.4 million hectares, which is attributed to the reduction in acreage under major field crop segments in the country, such as grains & cereals and oilseeds. Under row crops, grains & cereals occupied the major share of the acreage, which accounted for 96.9% in 2022 with 12.9 million hectares. However, the acreage declined by 7.4% due to the limited water supplies for off-season rice cultivation in the northeastern region and the reduced exports of fragrant and parboiled rice. However, the acreage increased after 2022 due to the demand for rice and farmers shifting from cassava to corn in northern and northeastern regions. Moreover, the financial incentives for corn farmers from the Bank for Agriculture and Agricultural Cooperatives (BAAC) are estimated to drive the acreage.
- Pulses and oilseeds are the country's major row crop segments, accounting for 1.7% and 1.04% in 2022, respectively, due to their protein content and consumption demand. Soybeans are the major crop used in beverage and processed food production, especially for soymilk and soy sauces. The area under cultivation of soybean declined in 2019 by 34.6% from 24 thousand hectares in 2018 due to the reduction in demand from oil crushers.
- Therefore, to meet the increasing demand from the processing and food market, the government is promoting important row crops and changing policies, which are estimated to boost the area under row crops in the coming years.

Cabbage and lettuce seeds with quality attributes and wider adaptability are cultivated extensively to meet the growing demand for new crop varieties

- Cabbage and lettuce are among the major crops grown in Thailand. Seeds with multiple traits are cultivated in the country, such as disease tolerance (Alternaria leaf blight, rots, downy mildew, big veins, and wilts), quality attributes such as the size of the head, the color of head leaves, and shape of the head. Furthermore, the growers widely use other traits such as uniform maturity of heads and wide adaptability to different soil conditions and seasons. Additionally, the size of heads and head weight are the major traits that have a significant demand, as they help increase yield productivity per hectare.?? Companies such as Syngenta AG and Rijk Zwaan provide cabbage seeds with these traits to grow in adverse weather conditions with high quality.
- Lettuce is a cool-season vegetable crop. Due to the increasing demand for lettuce in the off-season, farmers are using protected cultivation for the crop. High summer temperatures in a greenhouse can cause lettuce to bolt prematurely. Therefore, the demand for bolting-resistant varieties is expected to grow in the future to prevent bolting and increase the cultivation of lettuce in the summer. Moreover, due to the high demand for lettuce in salads and the rising demand for the crop by the food industry, the demand for early maturity traits with wider adaptability is increasing. For instance, Groupe Limagrain's products, such as Early Impulse and Early Income, help in early maturity crop production.

- The prevalence of different diseases, high-quality crop requirements by the food industry, changes in weather conditions, and new cultivation methods are expected to increase the demand for new seed varieties during the forecast period.

Thailand Seed Industry Overview

The Thailand Seed Market is fragmented, with the top five companies occupying 16.46%. The major players in this market are Advanta Seeds - UPL, 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

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
 - 4.1.1 Row Crops
 - 4.1.2 Vegetables
- 4.2 Most Popular Traits
 - 4.2.1 Cabbage & Lettuce
 - 4.2.2 Rice & Corn
 - 4.2.3 Tomato & Cucumber
- 4.3 Breeding Techniques
 - 4.3.1 Row Crops & Vegetables
- 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 Open Pollinated Varieties & Hybrid Derivatives
 - 5.2 Cultivation Mechanism
 - 5.2.1 Open Field
 - 5.2.2 Protected Cultivation
 - 5.3 Crop Type

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- 5.3.1 Row Crops
 - 5.3.1.1 Fiber Crops
 - 5.3.1.1.1 Cotton
 - 5.3.1.1.2 Other Fiber Crops
 - 5.3.1.2 Forage Crops
 - 5.3.1.2.1 Forage Corn
 - 5.3.1.2.2 Forage Sorghum
 - 5.3.1.2.3 Other Forage Crops
 - 5.3.1.3 Grains & Cereals
 - 5.3.1.3.1 Corn
 - 5.3.1.3.2 Rice
 - 5.3.1.3.3 Sorghum
 - 5.3.1.3.4 Wheat
 - 5.3.1.3.5 Other Grains & Cereals
 - 5.3.1.4 Oilseeds
 - 5.3.1.4.1 Soybean
 - 5.3.1.4.2 Sunflower
 - 5.3.1.4.3 Other Oilseeds
 - 5.3.1.5 Pulses
- 5.3.2 Vegetables
 - 5.3.2.1 Brassicas
 - 5.3.2.1.1 Cabbage
 - 5.3.2.1.2 Carrot
 - 5.3.2.1.3 Cauliflower & Broccoli
 - 5.3.2.1.4 Other Brassicas
 - 5.3.2.2 Cucurbits
 - 5.3.2.2.1 Cucumber & Gherkin
 - 5.3.2.2.2 Pumpkin & Squash
 - 5.3.2.2.3 Other Cucurbits
 - 5.3.2.3 Roots & Bulbs
 - 5.3.2.3.1 Garlic
 - 5.3.2.3.2 Onion
 - 5.3.2.3.3 Potato
 - 5.3.2.3.4 Other Roots & Bulbs
 - 5.3.2.4 Solanaceae
 - 5.3.2.4.1 Chilli
 - 5.3.2.4.2 Eggplant
 - 5.3.2.4.3 Tomato
 - 5.3.2.4.4 Other Solanaceae
 - 5.3.2.5 Unclassified Vegetables
 - 5.3.2.5.1 Asparagus
 - 5.3.2.5.2 Lettuce
 - 5.3.2.5.3 Peas
 - 5.3.2.5.4 Other Unclassified Vegetables

6 COMPETITIVE LANDSCAPE

6.1 Key Strategic Moves

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- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Advanta Seeds - UPL
 - 6.4.2 Charoen Pokphand Group (CP Group)
 - 6.4.3 DCM Shriram Ltd (Bioseed)
 - 6.4.4 East-West Seed
 - 6.4.5 Enza Zaden
 - 6.4.6 Groupe Limagrain
 - 6.4.7 Known You Seed Co. Ltd
 - 6.4.8 Lion Seeds Co. Ltd
 - 6.4.9 Rijk Zwaan Zaadteelt en Zaadhandel BV
 - 6.4.10 Syngenta Group

7 KEY STRATEGIC QUESTIONS FOR SEEDS CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 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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