

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

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### **Report description:**

The United States Seed Market size is estimated at 20.88 billion USD in 2025, and is expected to reach 29.09 billion USD by 2030, growing at a CAGR of 6.85% during the forecast period (2025-2030).

Hybrids dominated the segment with higher adoption of transgenic hybrids in corn and soybean

- In the United States, hybrids had a larger share in the country's seed market as growers prefer hybrids to earn high profits and obtain higher yields. In 2022, hybrids accounted for 84.0% of the seed market, whereas open-pollinated varieties and hybrid derivatives accounted for 16.0% in 2022, mainly due to the enhanced yield and pest resistance offered by hybrids.
- Among the hybrids, corn is the major crop sown in the country, and hybrid seeds contributed 87.7% of the total US corn seed market in 2022. The high share is associated with the increased use of double-cross hybrids, higher adoption of transgenic hybrids, and demand from livestock producers as feed.
- The use of transgenic hybrids is increasing in the country due to the increasing demand for animal feed and the demand from the processing industry to produce various end products, including corn starch, soybean oil, and canola oil. This demand is compensated by transgenic hybrids, which had a share of 75.1% in hybrids in 2022.
- Tomato is estimated to be the fastest-growing sub-segment in the US hybrid seed market, with a CAGR of 8.3% during the forecast period, as there is high demand for tomatoes in the country for consumption and processing industries.
- However, the increasing low-cost open-pollinated varieties, their adaptability to different climatic conditions, and the reduced timely availability of hybrids in all the crops are boosting the demand for open-pollinated varieties in the country.
- An increase in the livestock production and consumption of meat in the country, increasing demand for disease and pest-resistant varieties, increasing demand from the processing industries, and low cost of open-pollinated varieties are driving

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the demand for new types of hybrids and open-pollinated varieties.

## United States Seed Market Trends

The growing demand for row crops and their export potential is anticipated to drive the overall row crop cultivation in the United States

- The United States is the major agricultural producer in the world. Corn, wheat, soybean, cotton, and hay are the major row crops produced in the country. Row crops accounted for more than 98% of the total harvested acreage in 2022. Cereals and grains held the largest area under row crops, which accounted for about 50.3% of the total row crops area in 2022. Among cereals and grains, corn is the major crop with the largest cultivated area, which accounted for 31.1% of the total row crop area in 2022. This large cultivation area of corn is mainly because the United States is the largest producer, consumer, and exporter of corn in the world. It exported 58.5 million metric ton of corn in 2022. With the increasing domestic and international demand for corn from various feed industries, the overall area of corn is anticipated to grow during the forecast period.
- Among oilseeds, soybeans are largely produced in the country, which accounted for 31.3% of the total row crop area in 2022. With the growing demand for oil and biofuel, the demand for oilseed cultivation also increased in the country, and the soybean cultivation area increased by about 16.5% between 2019 and 2022. The increasing demand for oil seeds is anticipated to drive the row crop area in the country.
- Among fiber crops, cotton is the major crop, covering 4.0 million hectares in 2022. The United States was the third-largest cotton producer in the world in the same year. Cotton has a high export potential, and the cultivation area is anticipated to reach 4.4 million hectares during the forecast period due to its growing demand. The growing demand for row crops and their export potential is anticipated to drive the overall row crop cultivation in the United States during the forecast period.

Disease resistance is one of the significant traits in cabbage, cauliflower, and broccoli cultivation due to its ability to resist prevalent diseases, which are common challenges faced by these vegetable growers

- Cabbage is a major Brassica vegetable grown widely in the country. Hybrids with multiple traits are highly cultivated in the country. Varieties with disease-tolerant and high-quality traits, including the size of the head, the color of head leaves, and the shape of the head, along with other traits such as uniform maturity, early and late maturity, and wider adaptability to different seasons and soil conditions, are cultivated in the country.??
- Disease resistance to Fusarium, clubroot, the size of heads, and head weight are the major traits in high demand, as they help increase yield productivity per hectare and prevent yield losses.? For instance, Bejo Zaden has more than 6 seed varieties with traits that are resistant to diseases such as tip burn and frost, as well as wider adaptability traits. Moreover, some of the major selling brands in this segment are Emiko, Pacifiko, and Savoy Faire, as they contain different traits such as disease tolerance and other characteristics in a single product.
- Cauliflower is another major Brassica vegetable. Major traits available in the country are disease resistance, tolerance to tip burn, early and late maturity, and quality traits such as coloring, curd hardness, inner wrapping, uniform maturing, strength against summer, and wider adaptability to all seasons.?? Enza Zaden, Bejo Zaden BV, Bayer AG, and Syngenta are major

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companies breeding the cucumber traits.

- With the increasing domestic demand, hybrids with multiple traits play a dominant role in overcoming these difficulties. Therefore, the companies developing new traits are helping to create innovative vegetable seed varieties catering to the needs of growers in the country and helping in the market's growth during the forecast period.??

## United States Seed Industry Overview

The United States Seed Market is moderately consolidated, with the top five companies occupying 57.09%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Land O'Lakes Inc. and Syngenta Group (sorted alphabetically).

Additional Benefits:

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

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