

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

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Report description:

The Vegetable Seed Market size is estimated at 8.94 billion USD in 2025, and is expected to reach 11.75 billion USD by 2030, growing at a CAGR of 5.63% during the forecast period (2025-2030).

Hybrids dominated the vegetable seed market due to their traits such as high yield, pest resistance, early bearing and uniform size of produce

- Globally, hybrid varieties dominated the vegetable seed market with a share of 80.6% in 2022, whereas open-pollinated vegetable seeds held a share of 19.4%. An increase in the need to boost vegetable production and the emergence of new pests are driving the global hybrid vegetable seed market.
- In 2022, cucurbits and unclassified vegetables are the major crops with higher adoption of hybrids, accounting for 25.8% and 22.9%, respectively, of the global hybrid vegetable seed market. Tomato, cucumber & gherkin, and pumpkin & squash were the three most significant vegetable crops, accounting for 13.0%, 12.2%, and 9.7% share of the global hybrid vegetable seed market, respectively, in 2022.
- Asia-Pacific was the major region in the world using hybrids in the cultivation of vegetables, accounting for 36.5% of the global hybrid vegetable seed market in 2022. China and India are the leading countries in the region, holding together about 56.3% of the Asia-Pacific hybrid vegetable market in 2022.
- In 2022, unclassified vegetables and solanaceous accounted for about 30.1% and 25%, respectively, of the open-pollinated vegetable seeds market in terms of value. Globally, tomato (14.9%), pumpkin & squash (6.5%), cucumber & gherkin (6.3%), lettuce (6.1%), and other roots such as sweet potato and cassava accounted major share in the global open-pollinated varieties market in 2022.

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- Asia-Pacific was the largest region in the world under the open-pollinated varieties, accounting for 44.5% of the global OPV vegetable seed market in 2022, followed by Africa and Europe, which accounted for 18.5% and 15.2%, respectively. Higher input costs for hybrids and the high affordability of open-pollinated varieties are the factors driving the usage of OPV in vegetable cultivation.

Asia-Pacific dominated the global vegetable seed market in 2022

- In 2022, the global vegetable seed market was valued at USD 7.68 billion. Asia-Pacific is the largest vegetable producer in the world. It held 30.2% of the global vegetable seed market in 2022. China and India are the largest vegetable seeds users in the region, accounting for 39% and 19.8%, respectively, of the Asia-Pacific vegetable seeds market.
- Asia-Pacific has the largest tomato seed market in the world, with 36.5% of the global tomato seed market in terms of value, and the second largest region in the cucurbits seed segment, accounting for 35.6% of the global cucurbits seed market. The total acreage of tomatoes in Asia-Pacific was 2.6 million ha in 2022.
- Europe is the second-largest vegetable seed consumer in the world. The region's share in the respective global vegetable seed market was 27.8% in 2022. The major vegetables grown were tomato, pumpkin & squash, onion, and lettuce.
- North America is the third largest vegetable seed consumer in the world. It accounted for 22.8% of the global vegetable seed market in 2022. Cucurbit seeds were produced in the region with a share of 27.9%, followed by brassicas (22.4%), unclassified vegetables (21.9%), and roots & bulbs (13.8%). North America held the major share of the cucumber & gherkin, accounting for 28.6% of the total global cucumber and gherkin seed market. The United States alone held a 19.6% share in the global cucumber & gherkin seed market in 2022.
- In Africa, the major growing vegetable family is Solanaceae crops, accounting for 20.2% of the global unclassified vegetable seed market and 50.6% of the African vegetable seed market in 2022.
- The demand for vegetables is growing rapidly due to growing awareness of the importance of eating a healthy diet and increasing usage of hybrid seeds.

Global Vegetable Seed Market Trends

Asia-Pacific and Africa held the most significant areas under vegetable cultivation due to the favorable agroclimatic conditions

- The vegetable cultivation area accounted for about 7.9% of the total global cultivation area in 2022. There is an increasing demand for vegetables across regions, which is the major factor driving vegetable cultivation worldwide. Asia-Pacific held the largest acreage under vegetable cultivation, which accounted for about 45.4% of the global vegetable acreage in 2022. India and China are the leading producers not only in Asia-Pacific but also in the world. The high export potential of vegetables drives their cultivation area in the region.
- Africa held the second-largest area under vegetable cultivation, with about 51.3 million hectares in 2022. Roots and bulbs are major vegetable crops growing in the region, and they accounted for the major share of 84.9% of the African vegetable acreage in 2022. This is because the region's diverse agro-climatic zones provide favorable conditions for root & bulb cultivation.
- In 2022, vegetables were grown on almost 11.4 million ha in Europe. Russia, Ukraine, Turkey, France, Spain, and Germany cover the major area under vegetables in Europe, covering around 69.6% of the region's vegetable acreage in 2022. The growing consumption and demand from the processing industry are anticipated to drive the acreage during the forecast period.
- In 2022, vegetables were grown on almost 5.3 million ha in South America. Brazil is the major vegetable producer. It accounted for 27.8% of the South American vegetable cultivated area, with 2.4 million hectares in 2022. The growing demand for vegetables

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is projected to drive the acreage. The growing demand for vegetables across various industries and consumers is anticipated to drive the acreage during the forecast period.

High demand for cabbage seeds with black rot resistance and good quality traits for pumpkin are boosting the seed market

- Cabbage is one of the most widely cultivated vegetables. Its varieties, with characteristics such as uniformity in head size, foliage color, adaptability to various conditions, early maturity, and disease tolerance, are mainly preferred by growers. In cabbage, black rot is the major disease caused by the *Xanthomonas campestris* pv. *campestris* (XCC), and it affects crop yield by about 50%. There is a high demand for varieties that can resist black rot. Therefore, most companies focus on developing black rot-resistant varieties of cabbages with higher yield potential. For instance, major players such as Bayer AG, BASF SE, Sakata Seeds Corporation, and Syngenta Group are providing seeds with traits that are resistant to diseases, such as black rot, powdery mildew, downy mildew, and other leaf diseases, along with higher productivity. These seed varieties are witnessing high demand as they can prevent crop losses.?
- Globally, pumpkin and squash are the major cucurbits widely grown. The popular traits of pumpkin and squash 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, the diseases resistant and quality attribute traits will be more widely available as companies are developing new varieties with mildew tolerance and virus resistance, as well as uniformity, color, and flavor. For instance, in 2021, Enza Zaden launched new pumpkin seed varieties such as Orange Summer and Butternut.
- The prevalence of different diseases, changes in weather conditions, and high-quality attributes such as size and color are increasing the demand for new seed varieties during the forecast period.

Vegetable Seed Industry Overview

The Vegetable Seed Market is moderately consolidated, with the top five companies occupying 40.55%. The major players in this market are BASF SE, Bayer AG, Groupe Limagrain, Rijk Zwaan Zaadteelt en Zaadhandel BV and Sakata Seeds Corporation (sorted alphabetically).

Additional Benefits:

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

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