

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

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### **Report description:**

The Vietnam Seed Market size is estimated at 373.5 million USD in 2025, and is expected to reach 470.6 million USD by 2030, growing at a CAGR of 4.73% during the forecast period (2025-2030).

The improved traits of hybrid seeds such as higher productivity, wider adaptability, high degree of resistance to biotic and abiotic stresses drive the market

- Open-pollinated varieties and hybrid derivatives (OPVs) dominated the market in 2022, which accounted for about 56.0% of the Vietnamese seed market. Row crops held about 90.7% of the Vietnamese OPVs seed market in 2022. In Vietnam, the government is promoting locally bred open-pollinated varieties by a restriction on the maximum price that international seed companies can charge. OPVs require fewer inputs and are more affordable for low-income farmers. Reducing the reliance on hybrid seed imports and developing local seeds provides opportunities for poverty reduction in disadvantaged regions.
- In 2022, transgenic hybrids accounted for 4.8% of the Vietnamese hybrid seed market value due to their higher productivity, wider adaptability, high degree of resistance to insects, and herbicide-tolerant characteristics. Hybrids' wider adaptability is mainly due to their high buffering capacity to environmental fluctuations.??? Similarly, the non-transgenic seeds market held more than 95.2% share value in the Vietnamese hybrid seed market in the same year. This is mainly due to the high adoption and high usage of hybrid seeds in the country compared to traditional or inbred seeds. ???
- Maize seeds held the largest share value in the non-transgenic hybrid seed market, with a 36.7% market share value in 2022. According to the Ministry of Agriculture and Rural Development, in Vietnam, all corn fields use hybrid seeds, especially in the northern midland and mountainous regions.???Therefore, it can be a restraint for the OPV segment during the forecast period.
- The ability of hybrid seeds to resist various diseases and the increasing adoption of hybrid corn seeds are anticipated to drive

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the hybrid seed market at a faster growth rate compared to OPVs during the forecast period.

## Vietnam Seed Market Trends

Rice and corn accounted for more than 96% of the cultivated area of cereal crops as they are staple foods in the country

- Vietnam is one of the major producers of grains and cereals in the Asia-Pacific region. Among cereals, rice and corn are the major crops in the country; they accounted for a share of more than 96% of the area under cultivation in 2022. In Vietnam, the area harvested for rice accounted for 7.2 million ha in 2022, and the production was 43.8 million metric tons in 2021. The Mekong River Delta and the Red River Delta are the major rice-cultivating regions in the country. In 2022, these regions accounted for 70% of the rice cultivation area in the country. Furthermore, Maize is an important grain crop cultivated in the country; it had a cultivation area of 908.8 thousand hectares in 2022. The major maize-producing regions in Vietnam are the Northern mountains, the central provinces, and the central highlands. The Northern midland and mountainous regions accounted for around 46% of the total area in the country in 2022.
- In 2022, soybeans were cultivated on 37 thousand hectares. In Vietnam, the soybean planting area is not stable. Domestic soybean production is only enough to supply about 8-10% of demand. The fluctuation in the area is due to farmers switching to more profitable crops. However, due to rising demand from the food and feed industries, the area under cultivation is estimated to increase during the forecast period. However, the area under the cultivation of forage corn in the country decreased from 32.9 thousand hectares in 2017 to 27.2 thousand hectares in 2022. This decrease in acreage was associated with farmers shifting to other crops in the country.
- The high demand for consumption is expected to increase the cultivation area for field crops during the forecast period.

Vietnam extensively cultivates cucumber hybrids with disease resistance and other attributes and high-yielding varieties of asparagus with multiple traits

- Cucumbers and asparagus are the major vegetable crops grown in Vietnam. Quality attributes such as color, size, shape, aroma, and taste have the highest demand from cucumber growers as these traits help them sell their crops at a higher price and meet the growing demand for salads. For instance, Rijk Zwaan's Sugoy RZ F1, Khassib RZ F1, and Groupe Limagrain's CAESAR 17 F1 have these traits, and these varieties are among the largest sellers of cucumber crops in the country. Furthermore, Bejo Zaden has about eight products with traits such as shoot size, shape, and size of asparagus.
- Disease-resistant traits for cucumbers are majorly adopted by growers in the market as cucumbers are widely affected by powdery mildew, black rot, and fusarium wilt, which affect the yield by 10-20%. Hence, there is an increasing demand for seeds that are resistant to these diseases. Cengel RZ F1, AKIDO RZ F1, and Sakura are some of the products by Rijk Zwaan and Vina Seed that help build resistance to these diseases.
- High uniformity, long shelf life, and wider adaptability are the other traits in high demand in the country. These traits are preferred by growers as they allow cultivation in different climatic conditions and soil types with longer storage capacity, as well as fetch higher prices. Companies such as Groupe Limagrain, Vina Seed, and Bejo Zaden have seed varieties with these traits.
- High-quality vegetables produced by resisting different diseases and increasing their shelf life will help increase the demand for

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these traits and boost the growth of the seed market during the forecast period.

## Vietnam Seed Industry Overview

The Vietnam Seed Market is fragmented, with the top five companies occupying 16.23%. The major players in this market are Bayer AG, Enza Zaden, Groupe Limagrain, Known You Seed Co. Ltd and Vietnam National Seed Group (VINASEED) (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 Cucumber & Asparagus

###### 4.2.2 Rice & Corn

###### 4.2.3 Tomato & Cabbage

##### 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 Transgenic Hybrids

###### 5.1.1.2.1 Herbicide Tolerant Hybrids

###### 5.1.1.2.2 Insect Resistant Hybrids

###### 5.1.2 Open Pollinated Varieties & Hybrid Derivatives

##### 5.2 Cultivation Mechanism

###### 5.2.1 Open Field

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- 5.2.2 Protected Cultivation
- 5.3 Crop Type
  - 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 Alfalfa
      - 5.3.1.2.2 Forage Corn
      - 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 Other Grains & Cereals
    - 5.3.1.4 Oilseeds
      - 5.3.1.4.1 Canola, Rapeseed & Mustard
      - 5.3.1.4.2 Soybean
      - 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 Spinach
      - 5.3.2.5.3 Other Unclassified Vegetables

## 6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis

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- 6.3 Company Landscape
- 6.4 Company Profiles
  - 6.4.1 Bayer AG
  - 6.4.2 Bejo Zaden BV
  - 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 Rijk Zwaan Zaadteelt en Zaadhandel BV
  - 6.4.9 Syngenta Group
  - 6.4.10 Vietnam National Seed Group (VINASEED)

## 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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