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

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Report description:

The Wheat Seed Market size is estimated at 6.36 billion USD in 2025, and is expected to reach 8.38 billion USD by 2030, growing at a CAGR of 5.65% during the forecast period (2025-2030).

Open pollinated varieties dominated the global wheat seed market

- Globally, in 2022, open pollinated varieties and hybrid derivatives accounted for 9% of the wheat seed market, as it is largely used for cultivation across the globe due to OPV being self-pollinated and the lower cost of open-pollinated seed varieties. In 2022, North America was the largest region using open-pollinated varieties and hybrid derivatives for the cultivation of wheat, accounting for 25% of the global wheat seed market. This is associated with the affordability and high availability of OPVs in the world.
- Brazil and Spain are the fastest-growing countries in the global OPV wheat seed market. Both countries are projected to register a CAGR of 10.7% and 8.4% during the forecast period due to the demand from farmers and the increase in the demand for wheat from international markets.
- Globally, hybrids accounted for only 5% of the total wheat seed market in 2022, which is projected to increase by 58% by 2030 due to the increase in the demand for high-yielding and input-efficient seed varieties. Hybrid seeds can produce a 40% higher yield per hectare, which will help in the growth of the hybrid seed segment in Asia-Pacific. In 2022, among hybrids, non-transgenic wheat seeds accounted for about 95.4% of the global wheat seed market, whereas transgenic seeds accounted for 4.5% of the global hybrid wheat seed market. Recently, in 2022, Argentina and Brazil approved the cultivation of transgenic wheat (HB4) drought-tolerant varieties.
- Open pollinated varieties require fewer inputs, such as fertilizers and pesticides, and they are more affordable for low-income

farmers, which is projected to drive the OPV wheat seed market during the forecast period with a CAGR of 5.6%.

High consumption demand of wheat and lower investment are factors driving the market growth

- In 2022, wheat seed market accounted for 8.2% of the global seed market value. The wheat seed market value increased by 57.8% between 2017 and 2022. Europe was the largest wheat producer globally. It accounted for a 45.3% share of the global wheat seed market. France, Germany, the United Kingdom, Ukraine, and Russia held the largest share in the region, together accounted for 30.1% of the global wheat seed market in 2022.
- In 2022, the United States held a market share of 20.3% of the global wheat seed market due to higher seed storage and high ROI, as open-pollinated seed varieties are used more than hybrid seeds.
- The South American hybrid wheat seed market is anticipated to grow at a CAGR of 9.9% during the forecast period due to the increased cultivation area and the global demand for wheat. The wheat cultivation area in South America increased by more than 22% between 2017 and 2022 as more OPVs were used to produce wheat in large quantities to meet the global demand.
- South American growers are estimated to cultivate more wheat to compensate for the deficit in production and demand due to the Ukraine-Russia war. Argentina is the primary South American producer and exporter of wheat, accounting for about 7% of the global exports in 2022.
- The usage of OPVs in wheat is higher as they are more affordable than hybrids and can be saved for the next crop season. Thus, growers can have a higher ROI as less investment is required for seeds due to the lower price of OPVs than hybrid seeds.
- Thus, the high consumption of wheat and lower investment are likely to boost the wheat segment's growth during the forecast period at a CAGR of 5.6%.

Global Wheat Seed Market Trends

The demand from consumers as a staple food and processing industries to produce biofuel led to an increase in the area under cultivation

- Globally, wheat is cultivated mainly in temperate regions and subtropical regions as a staple food. Asia-Pacific has the largest area under wheat cultivation in the world, with about 96.0 million hectares in 2022. The major countries for wheat cultivation in Asia-Pacific are India and China, which accounted for 32.7% and 24.4% of the total acreage under wheat in Asia-Pacific in 2022. The European region has the second largest area under wheat cultivation, with about 70.3 million hectares in 2022 due to the favorable climatic conditions. The demand from consumers and processing industries is expected to increase in the market. In Russia, the area harvested was 28.1 million hectares in 2022, which increased by 2.3% since 2017. Thus, an increase in the acreage under wheat is fueling the growth of the market. The domestic demand and industrial wheat demand for flour milling (including starch and bio-ethanol) was 2.8% higher in 2022 compared to 2021. This demand is anticipated to drive wheat acreage in the region during the forecast period.
- North America is the third-largest producer of wheat in the world, which accounted for about 11.3% of the global wheat production in 2022. The United States is the major producer of wheat in the region with about 15.1 million hectares in 2022. The growing demand for wheat in the country is anticipated to drive the overall wheat acreage during the forecast period.
- The increase in the demand as it is the staple food of many countries, an increase in the availability of high-yielding varieties, and the increase in research on stress-tolerant and disease-resistant varieties by private companies are expected to increase the area under cultivation of wheat globally, thereby increasing the demand for wheat seeds during the forecast period.

Increasing demand for disease resistant and wider adaptability traits to boost the yield and drive the growth of market

- Wheat is the major grain crop cultivated mainly in temperate regions and subtropical regions as a staple food crop. The popular traits are disease resistance, wider adaptability, and others (including lodging tolerance and quality attributes).
- The common diseases that cause significant yield losses are rust, fusarium head blight, Septoria leaf blotch, stripe rust, spot blotch, tan spot, and powdery mildew. The demand for varieties with resistance to these diseases is expected to lead to higher adoption by growers.? Furthermore, wheat is one of the most important and cultivated food grains in India.?? The most popular traits of the crop in the country include disease resistance, lodging tolerance, wider adaptability, and quality attributes such as grain size, grain color, and others. There is significant demand for disease-resistant seed varieties to resist rust and blunt smut traits as the diseases cause yield losses of more than 50%. For instance, in 2021, BASF SE developed the Ideltis seed brand for hybrid wheat, which provides characteristics such as high yield and quality.
- In Europe, companies such as Syngenta, Groupe Limagrain, and KWS SAAT are offering disease and pest-resistant wheat varieties such as SY Insitor, Graham, LG Typhoon, and LG Prince to address yield losses caused by diseases such as Septoria, rusts, OWBM (Orange Wheat Blossom Midge). Additionally, in 2021, Bayer and RAGT Semences signed a partnership agreement to develop hybrid wheat seeds using the latest breeding methodologies, high-performing seed product systems, and advanced digital solutions.? The prevalence of sucking pests and diseases, as well as higher demand for higher yields in shorter periods, are increasing the demand for improved seed varieties during the forecast period.??

Wheat Seed Industry Overview

The Wheat Seed Market is fragmented, with the top five companies occupying 21.58%. The major players in this market are Advanta Seeds - UPL, BASF SE, Corteva Agriscience, Florimond Desprez and Groupe Limagrain (sorted alphabetically).

Additional Benefits:

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

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