

## **Seed Treatment Market Size and Share Outlook - Forecast Trends and Growth Analysis Report (2025-2034)**

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### **Report description:**

The global seed treatment market size reached approximately USD 10.20 Billion in 2024 and is expected to continue expanding at a compound annual growth rate (CAGR) of 9.70% during the forecast period from 2025 to 2034. By 2034, the market is projected to attain around USD 25.74 Billion. Seed treatment therapy is crucial in enhancing crop production by improving seed resistance against pests and insects, which can significantly impact agricultural products. The application of seed treatment solutions helps protect seeds from seed and soil-borne infections, ultimately promoting healthier crops and reducing the risks associated with pathogens. Additionally, seed treatment can shorten germination time, boosting overall productivity and ensuring higher yields. With increasing demand for efficient agricultural practices and a growing focus on sustainable farming, the global seed treatment market is positioned for robust growth. As farmers seek better methods to manage pests and diseases, the demand for advanced seed treatment solutions is anticipated to rise substantially over the next decade.

The market is expanding as seed treatments protect crops from seed-borne and soil-borne diseases. Organic treatments are gaining popularity over hazardous chemicals, enhancing agricultural yield while promoting safer and more sustainable farming practices. Seed treatments play a crucial role. ICAR-IOR developed a biopolymer-based seed treatment technology to protect microbial agents and soil nutrients. It signed MoUs with two private seed companies to commercialise this patented technology, aiming to improve crop yields by 25-30%, as announced in November 2024.

The seed treatment market is witnessing increased seed treatment usage, particularly in developing economies where the demand for improved agricultural practices is rising. This is especially evident in the cultivation of fruits and vegetables, where seed treatments help bridge the demand-supply gap. With growing concerns over pests, the usage of insecticides and other pesticide products is also on the rise. Seed treatments provide effective solutions for pest management, leading to higher crop yields and better-quality produce in these emerging markets.

The seed treatment market is driving the growth of high-yield crops through integrated pest-management strategies. By

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enhancing pest resistance, bio-based seed treatment supports sustainable crop protection. This aligns with the increasing adoption of organic farming practices, improving overall agricultural productivity and reducing reliance on harmful chemicals. In February 2024, Locus Agriculture launched six new biological treatments for its Rhizolizer Duo product line, targeting row crop farmers. The additions included in-furrow treatments for corn, cotton, and legumes, and seed treatments for wheat, soybeans, and cereals, enhancing yield and resource efficiency.

The seed treatment market is experiencing significant growth, particularly in emerging economies in the Asia Pacific region. As demand for high-quality agricultural products increases, seed treatments are vital in enhancing crop production and export potential. These treatments support higher yields and better disease resistance, contributing to the global industry's growth and strengthening agricultural economies worldwide.

The seed treatment market is increasingly focusing on bio-based seed treatment solutions to address challenges posed by climate change and global warming. These treatments help combat soil-borne and seed-borne diseases, promoting sustainable agricultural practices. In September 2024, India introduced 109 new climate-resilient crops to combat the effects of climate change, including cereals, oilseeds, and horticultural varieties. These crops are designed to withstand erratic rainfall, extreme temperatures, and soil degradation, ensuring food security and supporting sustainable agricultural practices amidst environmental challenges. Additionally, bio-based solutions support a clean environment and enhance pandemic resilience, ensuring more robust crops in changing conditions while reducing environmental impact.

The seed treatment market has seen substantial growth, driven by ongoing research and development (R&D) efforts. Industry trends focus on the development of more effective and sustainable solutions to enhance crop protection and yield. This growth reflects increasing demand for advanced seed treatment technologies, supporting agricultural productivity worldwide.

#### Key Trends and Developments

Advancements in seed treatment technology, popularity of hybrid and genetically modified seeds, and increased focus on crop protection are factors boosting the seed treatment market growth.

June 2024

The Novo Nordisk Foundation has awarded a grant of up to USD 21.1 million to CIMMYT for the CropSustain initiative, which aims to reduce the nitrogen footprint of wheat cultivation by developing new wheat varieties using biological nitrification inhibition (BNI).

June 2024

The Inverness Graham Green Light Fund has invested in My Yield, a company that specialises in seed treatment technology to boost agricultural productivity. The investment aims to accelerate the development innovative seed treatment solutions.

June 2024

The Tamil Nadu government has launched the "Mannuyir Kaathu Mannuyir Kaappom" scheme to preserve soil fertility and improve soil health. The INR 206 crore scheme will distribute green manure seeds to two lakh farmers, which can increase soil nutrients and protect microorganisms.

June 2024

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BASF SE has introduced Nemasphere, a nematode resistance trait stacked with Enlist E3 herbicide-tolerant technology to combat soybean cyst nematode (SCN), the number one yield-robbing pest in soybeans, which costs soybean growers an estimated USD 1.5 billion in yield loss annually.

#### Advancements in seed treatment technology

Advancements in seed treatment technology is a key trend shaping the seed treatment market outlook as new products and techniques are being developed to improve seed quality. For example, biological seed treatments that use beneficial microorganisms to control pests and diseases are gaining popularity.

#### Rising popularity of hybrid and genetically modified seeds

The seed treatment market development is influenced by the growing popularity of hybrid and genetically modified seeds. As the demand for these seeds increases, so does the demand for seed treatments that can effectively protect and enhance their quality.

#### Increased focus on crop protection and yield enhancement

Farmers are seeking solutions that can improve crop yields while reducing losses due to pests and diseases. Seed treatments that offer these benefits are gaining popularity, as they help farmers maintain profitability and meet the growing demand for food.

#### Crop Insights

Cereals, including wheat and rice, benefit from seed treatment by enhancing resistance to diseases, improving germination rates, and boosting yields. These treatments help protect against pests, soil-borne infections, and environmental stress, contributing to higher productivity in the global seed treatment market. According to USDA and Australian government data, wheat is the leading cereal crop in Australia, with production hitting a record 37 million metric tons in MY 2022/23. Barley production was also strong, reaching 13.5 million metric tons.

Oilseeds such as soybeans, sunflower, and canola are vital to the global seed treatment market due to their high demand for both food and industrial uses. Seed treatments for oilseeds improve disease resistance, protect against pests, and enhance germination. They also promote robust plant growth and higher oil content. These treatments are crucial for ensuring the health of oilseed crops, enabling increased yields and contributing to sustainable agriculture in various regions.

Seed treatments for fruits and vegetables improve crop quality and yield by protecting against pathogens and pests. These treatments ensure better germination and stronger plant health, which results in higher-quality produce. They play a significant role in enhancing agricultural efficiency globally. According to Statistics Canada, the farm-gate value of fruits and vegetables rose by 2.5% year-on-year to reach USD 3.0 billion in 2024. Canada's total fruit and vegetable production increased by 3.3% to 3.3 billion kilograms, driven by a 10.6% rise in fruit yields and a 3.7% increase in vegetable yields.

Corn benefits significantly from seed treatments, which protect against pests, diseases, and environmental stressors. Seed treatment enhances seedling emergence and root development, ensuring faster germination and stronger plants. This leads to improved yields and overall crop productivity. By mitigating risks associated with seed and soil-borne diseases, seed treatments for corn offer farmers a cost-effective solution to enhance both the quality and quantity of their harvests, supporting the growth of the global seed treatment market.

#### Type Insights

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Synthetic seed treatments are widely used in the global seed treatment market for their effectiveness in protecting crops from pests, diseases, and environmental stress. These treatments offer reliable and quick results, enhancing seedling growth, improving yield potential, and ensuring consistent crop protection across a range of agricultural environments. BioConsortia partnered with H&T to launch a nitrogen-fixing microbial seed treatment in New Zealand for the 2024/2025 season. The treatment improves yield, reduces fertilizer use, and extends shelf life up to two years. Successful trials since 2021 demonstrated its effectiveness across multiple countries, offering both economic and environmental benefits.

Biological seed treatments utilise natural organisms, such as beneficial microbes, to protect seeds from pests and diseases. These eco-friendly solutions promote soil health and improve plant growth, offering sustainable alternatives to chemical treatments. Biological treatments support the global seed treatment market by encouraging organic farming practices and enhancing long-term crop resilience. In June 2024, DPH Biologicals partnered with KitoZyme to develop the first fungal chitosan seed treatment for U.S. growers. ChitoNox FC provides broad seedling protection against nematodes and soil-borne diseases, offering a sustainable biocontrol and biostimulant solution. This biopesticide uses renewable, non-GMO fungal chitosan, enhancing plant resilience.

### Function Insights

Seed protection in the global seed treatment market ensures seeds are shielded from pests, diseases, and environmental stress. By preventing seed and soil-borne infections, it improves germination rates and seedling health, contributing to higher crop yields and overall productivity. In May 2022, Syngenta Seedcare launched VICTRATO, a seed treatment targeting nematodes and fungal diseases in crops like soybeans, corn, and rice. Featuring TYMIRIUM technology, it increases yield, protects roots, and supports no-tillage practices, while being safe for beneficial insects and soil health.

Seed enhancement in the global seed treatment market focuses on improving seed quality and performance. It boosts seed germination, enhances nutrient absorption, and strengthens resistance to diseases and environmental stress. Through seed coating technologies, seeds are fortified with vital nutrients and growth stimulants, promoting stronger root development and faster growth. This leads to improved crop establishment, better yields, and more efficient use of resources, benefiting both farmers and the agricultural industry at large.

### Treatment Method Insights

Seed coating in the global seed treatment market enhances seed protection against pests, diseases, and environmental stress. It improves seed handling, provides nutrients, and supports faster germination, ultimately boosting crop yield and ensuring healthier, more resilient plants. In December 2024, The Indian Institute of Oilseeds Research (IIOR) introduced biopolymer technology for seed coating, enhancing crop yields by 25-30%. Developed by KSVP Chandrika and RD Prasad, it provides nutrients, protects against pests, and improves resilience, offering a cost-effective solution for farmers.

Seed dressing is a process where seeds are coated with chemicals or biological agents to protect them from diseases, pests, and other environmental factors. It improves seed health, boosts germination rates, and enhances crop productivity. Seed dressing is essential for safeguarding crops against early-stage infections, ensuring better seedling establishment. It also promotes more efficient use of resources by reducing the need for excessive pesticide or fungicide applications, supporting sustainable farming practices.

Seed pelleting involves coating seeds with a layer of material that improves seed handling, uniformity, and planting precision. It enhances germination and protects from environmental stress and pests, contributing to more consistent crop establishment and increased yields. In September 2022, Corteva Agriscience introduced seed coating technology to protect paddy crops from pests like leaf folder and yellow stem borer. The technology, initially launched in Thailand, reduces pesticide use and boosts yields by

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5-6%, with a rollout planned for Indonesia.

### Stage of Seed Treatment Insights

On-farm seed treatment provides direct control to farmers over seed quality and protection, ensuring optimal germination and early growth. It reduces reliance on external suppliers, offers cost-effectiveness, and allows for the timely application of treatments suited to specific environmental conditions. In May 2024, Savannah Seeds and ADAMA India launched the FullPage Rice Cropping Solution for paddy farmers in Chhattisgarh. The solution promises increased yields by 25-40%, cost savings of Rs 6,000 per acre, and reduced greenhouse gas emissions by 25-30%, addressing wild rice issues and enhancing sustainability.

Off-farm seed treatment involves treating seeds at specialised facilities before they are delivered to farms. This approach ensures a higher level of consistency, quality, and expertise in applying advanced treatments. It allows farmers to focus on other aspects of production while benefiting from professionally treated seeds, leading to improved germination rates and crop protection. Off-farm treatment can also reduce the risk of contamination and ensure better disease and pest resistance for higher yields.

### Regional Insights

Asia Pacific has a rapidly growing agricultural market, benefiting from increasing demand for high-yield crops and innovative seed treatments. It offers significant opportunities due to the region's large agricultural base and diverse crop production. In August 2024, Citic Group invested up to USD167 million in Longping High-Tech, increasing its stake to 25.9%. The investment aimed to support China's seed industry revitalization plan by funding R&D, repaying loans, and enhancing industry integration for food safety and innovation.

Europe remains a key region in the global seed treatment market, driven by stringent environmental regulations and the growing demand for sustainable agricultural practices. The adoption of bio-based and organic seed treatments has increased in Europe, with significant investment in research and development. Europe's focus on innovation, crop protection, and sustainability positions it as a leading market for seed treatment solutions.

North America, particularly the United States and Canada, is a dominant force in the global seed treatment market. The region benefits from advanced agricultural practices, a strong focus on R&D, and early adoption of innovative seed treatment technologies. With the rising need for efficient pest control and higher crop yields, North America continues to lead in seed treatment applications and sustainable solutions.

Latin America's agricultural sector is growing rapidly, with significant demand for improved crop yields. Seed treatment technologies provide essential benefits, including pest management, disease control, and increased productivity in the region. In March 2025, Promotora Social Mexico and Impacta VC launched the USD 5M Impact Ventures PSM Fund to invest between USD 100K and USD 300K in 20 Latin American pre-seed and seed-stage startups addressing social and environmental challenges, particularly in education, health, and climate.

The Middle East and Africa face unique challenges, such as drought and soil degradation. Seed treatments are vital in enhancing crop resilience, improving yields, and reducing water usage. With a focus on sustainability and food security, this region is increasingly adopting advanced seed treatment solutions. This market is expected to grow as agricultural practices become more efficient and resilient to climate change.

### Key Seed Treatment Company Insights

Market players are focused on developing innovative seed treatment solutions that enhance crop yields and protect seeds from

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pests and diseases.

#### Bayer CropScience

Bayer CropScience is a leading global agriculture company that develops and sells crop protection products, seeds, and digital farming solutions. Headquartered in Monheim am Rhein, Germany, the company was founded in 2002 as a subsidiary of Bayer AG.

#### Indian Farmers Fertiliser Cooperative Limited (IFFCO)

Indian Farmers Fertiliser Cooperative Limited (IFFCO) is the world's largest fertiliser cooperative, manufacturing and marketing a wide range of fertilisers and other agricultural inputs for Indian farmers. Based in New Delhi, India, IFFCO was founded in 1967.

#### Valent BioSciences LLC

Valent BioSciences LLC is a leading global provider of biorational products and technologies for agriculture, public health, and forest health applications. Headquartered in Illinois, United States, the company was founded in 1975. Valent BioSciences help farmers manage pests and diseases.

#### BioWorks, Inc.

BioWorks, Inc. is a leading provider of biological pest control and plant health products for the professional horticulture and agriculture markets. Based in New York, United States, the company was founded in 1991. BioWorks's product also promote sustainable agriculture practices.

#### Key Seed Treatment Companies

- ? Bayer CropScience
- ? Syngenta AG
- ? BASF SE
- ? Corteva
- ? FMC Corporation
- ? Incotec
- ? Nufarm US
- ? UPL Ltd.
- ? Solvay S.A.
- ? Eastman Chemical Company
- ? Novozymes
- ? Verdesian Life Sciences
- ? ITALPOLLINA S.p.A.
- ? Croda International plc
- ? Germains Seed Technology
- ? Certis Europe
- ? Lanxess AG
- ? Sumitomo Chemical Co., Ltd.
- ? Precision Laboratories, LLC
- ? BioWorks, Inc.
- ? Pro Farm Group

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- ? Indian Farmers Fertiliser Cooperative Limited (IFFCO)
- ? Valent BioSciences LLC
- ? Albaugh LLC
- ? Rizobacter Argentina SA
- ? Monsanto
- ? Crop Science
- ? Chemtura
- ? DuPont
- ? Others

#### Recent Developments

- ? In March 2025, BioLumic launched its first commercial light-activated Trait Activation System at Gro Alliance. This breakthrough technology enhances crop performance using light to regulate genetic expression, offering a scalable, cost-effective, and non-GMO alternative for trait innovation.
- ? Syngenta launched its first biologicals service centre at the Seedcare Institute in Maintal, Germany, in October 2023. This centre strengthens Syngenta's focus on biological seed treatments, offering expertise and services to meet growing demand for sustainable crop protection across the EU.
- ? BASF launched Poncho Votivo Precise seed treatment in October 2023, providing soybean farmers with protection from nematodes and insects. The treatment combines biological and insecticide solutions, promoting early-season plant vigor and maximizing yield potential.
- ? In May 2022, Bayer Vietnam launched Routine Start 280FS, a seed treatment to combat rice blast in early-season rice crops. The product improves germination, protects plants from fungal infections, and enhances yield, offering a sustainable, cost-effective solution for rice farmers.
- ? In May 2022, Syngenta launched Victrato, a seed treatment using Tymirium technology. It offers nematode and disease control, benefiting crops like soybeans, corn, and cotton. Victrato improves crop yield, optimizes water and nutrient uptake, and supports soil health.

#### Global Seed Treatment Market Segmentation

The global seed treatment market is expected to experience significant revenue growth, driven by industry trends and innovations in seed treatment technologies. Market segmentation, based on type, crop, and region, highlights key opportunities across global, regional, and country levels. Revenue growth forecasts suggest a strong demand for advanced seed treatments, with increased focus on improving crop yield and disease resistance. These trends are shaping market dynamics, influencing investments, and driving future growth across various sectors.

#### Type Outlook (Revenue, Billion, 2025-2034)

- ? Synthetic
- ??? Fungicides
- ??? Insecticides
- ??? Others
  
- ? Biological ??
  
- ??? Bio Pesticides
- ??? Bio Fertiliser

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??? Bio Stimulants

Function Outlook (Revenue, Billion, 2025-2034)

? Seed Protection

? Seed Enhancement

Treatment Method Outlook (Revenue, Billion, 2025-2034)

? Seed Coating

? Seed Dressing

? Seed Pelleting

Stage of Seed Treatment Outlook (Revenue, Billion, 2025-2034)

? On-Farm

? Off-Farm

Crop Outlook (Revenue, Billion, 2025-2034)

? Cereals

? Oilseeds

? Fruits and Vegetables

? Corn

? Soybean

? Wheat

? Canola

? Others

Region Outlook (Revenue, Billion, 2025-2034)

? North America

??? United States of America

??? Canada

? Europe

??? United Kingdom

??? Germany

??? France

??? Italy

??? Others

? Asia Pacific

??? China

??? Japan

??? India

??? ASEAN

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??? Australia

??? Others

? Latin America

??? Brazil

??? Argentina

??? Mexico

??? Others

? Middle East and Africa

??? Saudi Arabia

??? United Arab Emirates

??? Nigeria

??? South Africa

??? Others

Seed Treatment Market?Report Snapshots

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