SCOTTS INTERNATIONAL

Vegetable Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

Vegetable Seed Market Analysis

The vegetable seed market size in 2026 is estimated at USD 9.58 billion, growing from 2025 value of USD 9.07 billion with 2031 projections showing USD 12.56 billion, growing at 5.57% CAGR over 2026-2031. Robust investment in hybrid breeding, rapid urbanization that lifts vegetable consumption, and the spread of controlled-environment agriculture are primary forces behind this trajectory. Hybrid seeds already account for 80.7% of global sales, propelled by the uniform yields and pest resistance commercial growers require. Protected cultivation, greenhouses, net-houses, and vertical farms remain the fastest-growing sub-segment as producers seek year-round output and water-use efficiency. Regionally, Asia-Pacific commands 32.0% of revenues, while Europe records the quickest regional growth due to consumer preference for sustainably grown, premium produce. Competition stays moderate because no single firm exceeds 20% share, and many regional players thrive on local germplasm and crop specialization.

Global Vegetable Seed Market Trends and Insights

Hybrid Adoption Accelerates In Emerging Economies

Government subsidy programs and robust extension services continue to push hybrid penetration in India, Brazil, and Vietnam. Demonstration plots show 20-40% yield gains versus farmer-saved seed, convincing smallholders to shift despite higher initial cost. Local seed production hubs shorten supply chains and tailor varieties to regional climates, further lifting adoption.

Multinational companies build breeding stations in Maharashtra and Sao Paulo to capture these gains. The resulting productivity lift narrows yield gaps and strengthens domestic food security in populous nations.

Shifting Consumer Demand For Year-Round Premium Produce

Retailers now treat freshness, uniformity, and nutritional value as core selling points, rewarding growers who deliver a consistent supply regardless of season. In the Netherlands and Germany, consumers pay 30% more for locally grown produce, igniting greenhouse construction and higher seed turnover. U.S. organic vegetable sales hit USD 6.2 billion in 2024, spurring breeding for organically certifiable disease resistance. Specialty varieties for flavor, color, and micronutrient content migrate from gourmet to mass markets, broadening hybrid portfolios.

High Royalty Costs For Patented Traits

Patent royalties for advanced traits increase seed costs by 25-40%, limiting adoption among price-sensitive smallholder farmers who comprise 70% of global vegetable producers. Licensing fees for herbicide-tolerant and disease-resistant traits range from USD 8-15 per kilogram for hybrid seeds, compared to USD 2-4 for conventional varieties. Indian farmers increasingly turn to informal seed markets to avoid royalty payments, with counterfeit seeds representing an estimated 15-20% of total seed sales in major vegetable-producing states. Regulatory compliance with the International Union for the Protection of New Varieties of Plants conventions requires substantial investment in variety testing and documentation, creating barriers for smaller breeding companies seeking to commercialize innovative varieties.

Other drivers and restraints analyzed in the detailed report include:

Rise Of Protected Cultivation In Arid RegionsGene-Edited Speed Breeding BreakthroughsRegulatory Delays For Gene-Edited Cultivars

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Hybrid cultivars delivered 80.12% of 2025 revenue and are projected to achieve a 5.72% CAGR to 2031. This dominance stems from consistent physiological uniformity that underpins modern mechanized production and precise input scheduling. Marker-assisted selection and doubled-haploid technology shorten development cycles and enhance heterosis expression. The remaining 19.88% comes from open-pollinated varieties and hybrid derivatives favored in low-input or organic systems that value seed saving.

Hybrid penetration will intensify where tractors and optical sorters require even plant spacing and synchronized ripening. Gene-edited parental lines entering trial plots in California and Shandong are forecast to add another layer of disease resistance and firmness, reinforcing the hybrids' performance edge. Royalty fatigue among smaller growers keeps a viable niche for public-sector open-pollinated lines.

The Vegetable Seed Market Report is Segmented by Breeding Technology (Hybrids and Open Pollinated Varieties and Hybrid Derivatives), Cultivation Mechanism (Open Field and Protected Cultivation), Crop Family (Brassicas, Cucurbits, Roots and Bulbs, and More), and Geography (North America, South America, Europe, Africa, and More). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

Geography Analysis

Asia-Pacific generated 31.62% of 2025 sales of the vegetable seed market size, and China's southward facility expansion and India's hybrid subsidy schemes deepen penetration. Vietnam, Thailand, and the Philippines add momentum by moving from paddy rice to higher-margin salad crops near urban centers. Europe is the fastest-growing bloc at 6.78% CAGR, driven by greenhouse vegetables in the Netherlands and Spain and by organic acreage upticks in Germany and France. Common Agricultural Policy eco-schemes reward low-pesticide cultivation, spurring demand for naturally resistant cultivars and, soon, gene-edited lines once the legal framework stabilizes.

Europe represents the fastest-growing regional market at a 6.78% compound annual growth rate through 2031, despite holding a smaller market share, reflecting the region's focus on premium varieties, organic production systems, and sustainable agriculture practices that command higher seed prices. The Netherlands leads European greenhouse vegetable production with advanced breeding programs focused on resource efficiency and integrated pest management compatibility. Germany and France drive demand for organic-certified varieties and climate-resilient cultivars adapted to changing precipitation patterns and temperature ranges.

North America maintains mature adoption rates but still posts steady gains as controlled-environment acreage climbs in Canada's temperate provinces and in repurposed urban warehouses in the United States. Mexico bolsters the regional pipeline by exporting Roma tomatoes and bell peppers conforming to U.S. retail standards. South America shows double-digit unit growth, albeit from a smaller base. Brazil's protected-cultivation footprint in Sao Paulo and Minas Gerais expands 12% yearly, while Argentina's mechanized Pampas vegetable farms adopt hybrids suited to pivot irrigation.

List of Companies Covered in this Report:

Bayer AG BASF SE Groupe Limagrain Syngenta Group Rijk Zwaan Zaadteelt en Zaadhandel BV Sakata Seeds Corporation Advanta Seeds (UPL Ltd.) East-West Seed Enza Zaden BV Bejo Zaden BV Takii and Co., Ltd. Yuan Longping High-Tech Agriculture Co. Kaveri Seed Company Ltd. Nongwoo Bio Co., Ltd. Corteva Agriscience

Additional Benefits:

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

Table of Contents:

SCOTTS INTERNATIONAL

Vegetable Seed - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 120 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-02-26
		Signature	