

India Seed Industry Outlook to FY'2018 - Rapid Hybridization in Vegetables, Corn and Rice to Impel Growth

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Abstracts

The report titled “India Seed Industry Outlook to FY’2018 - Rapid Hybridization in Vegetables, Corn and Rice to Impel Growth” provides a comprehensive analysis of the market size of the India seed industry by revenue and production, market segmentation of seed by varietal/non-hybrid and non-varietal seeds, by cross bred and genetically modified seeds and by breeder, foundation and certified/ quality seeds. The report also entails the market share of major seed companies in India by revenue along with the market share by categories of hybrid seeds. The report also provides major trends and developments of seed industry in India. Government regulations in Indian seed industry are also included. An analysis of the future of India seed industry is provided on the basis of revenue of the market over next five years.

The Indian seed industry, over the years, has evolved by adopting and innovating upon scientific advancements in variety development and quality seed production.

The industry has grown at a rapid pace of 18.8% over the period FY’2007-FY’2013 and reached INR ~ million in FY’2013 on account of rapid adoption of BT cotton hybrids, single cross corn hybrids and hybrid vegetables. Rising awareness among the farmers related to the benefits of using certified/ quality seeds has led to an increase in the demand for seeds over the past few years. This has resulted in an increasing willingness among the farmers to pay higher price for quality seeds.

The hybrid seed market has grown at a stupendous CAGR of 36.1% over the period FY’2007-FY’2013. The contribution of varietal seeds to the overall commercial seed market in Indian has witnessed a steep decline from ~% in FY’2007 to ~% in FY’2013. In FY’2013, GM seeds contributed nearly ~% in the non-varietal seed revenue whereas

the contribution of cross bred hybrids was recorded as ~% during the year. This has been primarily due to the increased usage of hybrid seeds across the country due to the pressure of the rising demand for agricultural food products together with the massive losses suffered by crop diseases and pest attacks throughout the country.

The Indian seed market is majorly contributed by non-vegetable seeds such as corn, cotton, paddy, wheat, sorghum, sunflower and millets. In FY'2013, the non-vegetable seeds accounted for ~% of the overall seed market in India and generated revenue worth INR ~ million. On the other hand, vegetables accounted for ~% of the market in FY'2013. Non-vegetable seed market in India is largely concentrated in cotton, contributing the largest share of ~% to the overall market in FY'2013, followed by paddy with a share of nearly ~% to the overall revenue of the market.

The hybrid seed industry in India has been dominated by BT cotton over the years due to the increased planting areas of *Bacillus thuringiensis* cotton. In FY'2012, BT cotton contributed nearly ~% of the hybrid seed market revenue by generating INR ~ million which further inclined to ~ million in FY'2013. Vegetables were the third largest contributor to the hybrid seed market in India with a share of ~% in the revenue in FY'2012 and ~% in FY'2013.

The industry is highly competitive with the presence of several players with advanced technological capabilities. The hybrid seed market in India is largely held by Nuziveedu Seeds, Mahyco seeds, Monsanto, Rasi Seeds, Bayer India, Pioneer Seeds and Syngenta which captured nearly ~% of the market in FY'2012.

The hybrid vegetable seed market in India is majorly concentrated among the top five companies contributing ~% of the market in FY'2012. Syngenta was the market leader with a share of nearly ~% in the hybrid vegetable seed market in India in FY'2012. Nunhems India Private Limited of Bayer group is the second largest player in hybrid vegetable seed market in India with a market share of ~% in FY'2012. On the other hand, hybrid pearl millet market in India is majorly held by Bayer Crop Science, with a share of ~% , followed by JK Agro Genetics and Sri Ram Bio seeds accounting for ~% and ~% respectively in FY'2012.

KEY TOPICS COVERED IN THE REPORT

The market size of the Indian Seed Industry, FY'2007-FY'2013

The market size of the Indian Hybrid Seed Industry, FY'2007-FY'2013

Market segmentation of seed market in India by revenue and by production, FY'2007-FY'2013

Market segmentation by varietal/ non-hybrid and non-varietal/ hybrid seeds, FY'2007-FY'2013

Market segmentation of non-varietal seeds by cross bred hybrids and genetically modified hybrids, FY'2013

Market segmentation by type of non-vegetable and vegetable seeds, FY'2013

Hybrid Seed Market by Crops, FY'2012

Hybrid seed market in India, FY'2012

Hybrid seed market in India by various crops, FY'2012

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FY'2014-FY'2018

FY'2014-FY'2018

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