

Climate-Adaptive Crop Breeding Market - A Global and Regional Analysis: Focus on End User, Crop Type, Traits, Breeding Technique, and Country-Level Analysis - Analysis and Forecast, 2025-2035

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Abstracts

The climate-adaptive crop breeding market is gaining momentum due to the growing need to develop resilient crop varieties capable of withstanding the increasing impacts of climate change. Rising temperatures, irregular rainfall, droughts, and flooding are threatening global food security, making traditional breeding methods insufficient to meet future demand. Advances in genomics, gene editing, phenotyping, and AI-driven predictive modeling are accelerating the development of crops with enhanced tolerance to environmental stress, improved yield stability, and superior nutritional quality. Integrating digital tools, remote sensing, and high-throughput screening allows breeders to identify and select desirable traits faster and more accurately. While adoption is increasing, challenges such as high R&D costs, regulatory complexities, and infrastructure limitations remain; nevertheless, innovation, government initiatives, and growing investment in sustainable agriculture continue to drive market growth.

Market Overview

The climate-adaptive crop breeding market revenue was \$6,751.4 million in 2024 and is expected to reach \$20,546.6 million by 2035, growing at a CAGR of 10.46% during the forecast period (2025-2035). The climate-adaptive crop breeding market is emerging as a vital solution to global agricultural challenges posed by changing climatic conditions, including drought, heat, flooding, and unpredictable seasonal patterns. By combining advanced genomics, phenotyping technologies, and AI-driven predictive models, climate adaptive breeding enables the development of crop varieties that maintain high yield, nutritional quality, and resilience under extreme environmental stress. These

innovations allow breeders to rapidly identify stress-tolerant traits, accelerate selection cycles, and optimize breeding strategies across diverse agro-climatic zones. The market growth has been further supported by digital data integration, remote sensing, and high-throughput screening, which collectively enhance precision, reduce time-to-market, and ensure sustainable productivity. By focusing on crops critical to global food security, this sector empowers farmers and agribusinesses to mitigate climate risks, stabilize supply chains, and strengthen long-term agricultural resilience.

Industrial Impact

The climate-adaptive crop breeding market is transforming agricultural production by shifting crop development from traditional, trial-and-error approaches to data-driven, precision breeding strategies. By leveraging genomics, phenomics, AI-based predictive modeling, and high-throughput screening, breeders can rapidly identify traits for drought, heat, salinity, and pest resilience, enabling the development of climate-resilient crop varieties.

A major industrial impact is on agricultural resilience and productivity. Climate-adaptive breeding allows large agribusinesses to secure stable yields across variable climates, optimize resource use, and reduce losses from extreme weather events. Smallholder farmers benefit from improved crop varieties that maintain nutritional value and yield under environmental stress, enhancing food security and livelihood stability. Furthermore, integration of digital breeding platforms and remote sensing accelerates decision-making, shortens breeding cycles, and supports scalable, sustainable farming practices. Collectively, these advancements are driving the modernization of crop development, increasing efficiency, and strengthening the overall resilience of global agricultural systems.

Market Segmentation:

Segmentation 1: By Application

Farmers and Growers

Agri-Businesses and Cooperatives

Research and Academia

Others

Farmers and Growers Segment Leads the Market (by Application)

Farmers and growers are at the forefront of the climate-adaptive crop breeding market, as they directly experience the financial and operational impacts of climate volatility, including yield losses, quality reductions, delayed planting or harvesting, and higher input risks. This gives them a strong incentive to adopt resilient crop varieties at the field level. Enhanced seed traits such as heat, drought, flood, and salinity tolerance, early maturity, and disease resistance represent a low-barrier, repeatable intervention that can be seamlessly integrated into existing farming practices without significant capital investment. The benefits are immediate, translating into more stable yields and predictable income. With climate shocks becoming increasingly frequent, growers are now viewing varietal selection as a key risk-management strategy, alongside irrigation management, agronomic practices, and crop insurance.

Segmentation 2: By Crop Type

Cereals

Fruits and Vegetables

Legumes

Others

Cereals Segment Dominates the Market (by Crop Type)

Cereals dominate the climate-adaptive crop breeding market because they form the backbone of global food security, being staple grains such as wheat, rice, and maize that feed billions worldwide. Their large-scale cultivation, high economic value, and direct vulnerability to climate extremes, such as heat, drought, flooding, salinity, and emerging pests, make climate-resilient improvements critical. Modern breeding technologies, including genomic selection, speed breeding, and advanced gene-editing techniques, are particularly effective in cereals because these crops have well-characterized genomes, extensive germplasm collections, and high breeding potential. These innovations accelerate breeding cycles, increase genetic gain, and enable targeted improvements in complex traits such as stress tolerance, yield stability, and

disease resistance. Additionally, major cereal-growing countries like China, India, the U.S., Brazil, and Russia have heavily invested in both public and private breeding programs, further consolidating cereals' dominance in the climate-adaptive crop breeding market. The combination of scientific feasibility, large-scale impact, and urgent climate-driven demand ensures that cereals remain the primary focus of breeding innovations.

Segmentation 3: By Traits

Drought Tolerance

Heat Tolerance

Flood Tolerance

Others

Drought Tolerance Segment Dominates the Market (by Traits)

Drought tolerance is the leading focus in climate-adaptive crop breeding because water stress represents the most frequent and widespread climatic challenge in agriculture, affecting both rainfed and irrigated systems through irregular rainfall, extended dry periods, and declining groundwater availability. Its economic impact is highly visible, reducing yields, lowering grain quality and size, and increasing the risk of crop failure, which drives farmers to prioritize varieties that maintain stable production under moisture-limited conditions. From a breeding perspective, drought-resilient traits are applicable across major cereals and pulses and provide benefits across diverse geographies, making them the most scalable and high-impact target for public breeding programs and commercial seed companies.

Segmentation 4: By Breeding Technique

Genome Editing

Conventional Breeding

Marker-Assisted Breeding

Mutation Breeding

Others

Conventional Breeding Segment Dominates the Market (by Breeding Technique)

Conventional breeding remains the primary approach in climate-adaptive crop development because it is widely accepted and faces minimal regulatory hurdles, enabling the large-scale release of new varieties across countries. It builds on well-established public institute and seed company pipelines, extensive field trial networks, and strong farmer trust, allowing faster commercialization compared with methods that require additional biosafety approvals or face trade restrictions. Moreover, it is cost-effective for combining key resilience traits such as drought, heat, and disease tolerance using proven selection techniques, particularly in crops and regions where advanced biotech infrastructure or regulatory approval timelines are still limiting factors.

Segmentation 5: By Region

North America

Europe

Asia-Pacific

Rest-of-the-World

Asia Pacific Region Leads the Market (by Region)

Asia-Pacific leads the climate-adaptive crop breeding market because climate stress is a pressing constraint and food security is a national priority, driving governments and public research institutions, often in collaboration with CGIAR centers and local seed companies, to rapidly develop and scale stress-tolerant varieties (heat, drought, flood, salinity) for staple crops. “Seed-only” resilience solutions are particularly impactful, as they improve productivity without requiring significant farm capital investment. Dense breeding networks, enhanced genomics and phenotyping capabilities, and efficient seed distribution and extension systems enable rapid deployment during climate shocks, while digital advisory tools increasingly help farmers match varieties to specific micro-

climates.

Recent Developments in the Climate-Adaptive Crop Breeding Market

In August 2025, BASF partnered with the Indian Council of Agricultural Research Central Rice Research Institute to run climate-smart rice trials in Odisha and Jharkhand, evaluating alternate wetting and drying and herbicide-tolerant rice to cut emissions and sustain yield.

In September 2024, Corteva, Inc. and Pairwise partnered to advance gene-editing solutions in agriculture, aiming to support farmers, enhance sustainability, and benefit consumers. This collaboration leverages precise DNA improvements to help growers tackle food production challenges, including climate-related pressures.

How can this report add value to an organization?

Product/Innovation Strategy: Players in the climate-adaptive crop breeding market are focusing on developing advanced breeding platforms that integrate genomics, phenomics, AI-driven predictive modeling, and high-throughput phenotyping. Key innovations include speed breeding, gene-editing techniques like CRISPR and base editing, and digital tools for genotype-to-phenotype prediction. Companies and research institutions are also investing in collaborations with public research centers, seed companies, and technology providers to enhance trait discovery, accelerate variety development, and ensure scalability. The strategy emphasizes precision, efficiency, and adaptability, delivering climate-resilient crops with measurable yield stability and stress tolerance.

Growth/Marketing Strategy: Market growth is driven by rising climate stress, government-supported breeding programs, and increasing demand for resilient staple crops. Stakeholders leverage demonstration trials, farmer outreach programs, and digital advisory platforms to raise awareness of climate-adaptive varieties. Expansion strategies include targeting high-risk geographies, integrating seed distribution with extension services, and focusing on high-value traits like drought, heat, and disease tolerance. Marketing emphasizes the economic and risk-management benefits of climate-resilient crops, highlighting stable yields, income protection, and alignment with sustainable farming practices.

Competitive Strategy: Leading firms differentiate through advanced genomics pipelines, proprietary breeding technologies, and strong public-private partnerships. Competitive benchmarking focuses on trait portfolio breadth, speed of variety release, regional coverage, and adoption by large-scale and smallholder farmers. Companies strengthen their position through collaborations with research institutions, licensing of gene-editing platforms, and integration with digital advisory and seed distribution networks. Success depends on combining scientific innovation with scalable deployment, farmer trust, and responsiveness to emerging climate risks.

Research Methodology

Data Sources

Primary Data Sources

The primary sources involve industry experts from the climate-adaptive crop breeding market and various stakeholders in the ecosystem. Respondents such as CEOs, vice presidents, marketing directors, and technology and innovation directors have been interviewed to obtain and verify both qualitative and quantitative aspects of this research study.

The key data points taken from primary sources include:

- validation and triangulation of all the numbers and graphs
- validation of report segmentation and key qualitative findings
- understanding the competitive landscape
- validation of the numbers of various markets for market type
- percentage split of individual markets for geographical analysis

Secondary Data Sources

This research study involves the usage of extensive secondary research, directories, company websites, and annual reports. It also makes use of databases, such as Hoovers, Bloomberg, Businessweek, and Factiva, to collect useful and effective

information for an extensive, technical, market-oriented, and commercial study of the global market. In addition to core data sources, the study referenced insights from reputable organizations and websites such as the International Alliance for Climate Smart Agriculture (GACSA), Climate Resilient Agriculture Virtual Club (CRAgVC), and Climate Resilient Food Systems Alliance (CRFS), among others, to understand trends in smart farming and sustainability impacting climate-adaptive crop breeding adoption.

Secondary research was done to obtain crucial information about the industry's value chain, revenue models, the market's monetary chain, the total pool of key players, and the current and potential use cases and applications.

The key data points taken from secondary research include:

- segmentations and percentage shares

- data for market value

- key industry trends of the top players in the market

- qualitative insights into various aspects of the market, key trends, and emerging areas of innovation

- quantitative data for mathematical and statistical calculations

Data Triangulation

This research study involves the usage of extensive secondary sources, such as certified publications, articles from recognized authors, white papers, annual reports of companies, directories, and major databases, to collect useful and effective information for an extensive, technical, market-oriented, and commercial study of the climate-adaptive crop breeding market. The process of market engineering involves the calculation of the market statistics, market size estimation, market forecast, market crackdown, and data triangulation (the methodology for such quantitative data processes has been explained in further sections). The primary research study has been undertaken to gather information and validate the market numbers for segmentation types and industry trends of the key players in the market.

Key Market Players and Competition Synopsis

The climate-adaptive crop breeding market is becoming increasingly competitive, driven by rising climate risks, demand for resilient crop varieties, and rapid adoption of modern breeding technologies. Key players have focused on integrating speed breeding, genomic selection, CRISPR-based gene editing, and high-throughput phenotyping to accelerate variety development and enhance trait precision. In 2024, Corteva expanded its Granular platform to include climate-resilient wheat and maize varieties, leveraging genomic prediction and digital advisory tools for farmer adoption. Similarly, Bayer's Climate FieldView integrated predictive breeding insights with regional agronomic data to guide the selection of drought- and heat-tolerant varieties. Meanwhile, Syngenta advanced its gene-editing programs and public-private collaborations to release flood- and salinity-tolerant rice varieties, strengthening its position in Asia's high-priority climate-sensitive markets.

Some prominent names established in this market are:

BASF SE

Bayer AG

Corteva Inc.

DLF

Inari Agriculture Inc.

Syngenta Group Co Ltd.

East-West Seed

JK Agri-Genetics Ltd

Enza Zaden

KWS SAAT SE & Co. KGaA

Nufarm Limited

Sakata Seed Corporation

Stine Seed

Limagrain

TROPIC

This report can be delivered within 1 working day.

Contents

Executive Summary
Scope and Definition

1 MARKET: INDUSTRY OUTLOOK

1.1 Trends, Drivers, Challenges, and Opportunities: Current and Future Impact Assessment

1.1.1 Rapid Adoption of Genomic Selection and Gene Editing to Shorten Breeding Cycles and Target Drought/Heat Tolerance

1.1.2 Increasing Use of High-Throughput Phenotyping and AI-Driven Data Analytics to Accelerate Trait Discovery

1.1.3 Growing Market for Trait Stacked Seed Products in Climate-Vulnerable Regions

1.2 Supply Chain Overview

1.2.1 Value Chain Analysis

1.2.2 Market Map

1.3 Research and Development Review

1.3.1 Patent Filing Trend by Country and by Company

1.4 Regulatory Landscape

1.5 Market Dynamics Overview

1.5.1 Market Drivers

1.5.1.1 Rising Frequency and Severity of Climate Extremes or Abiotic Stressors

1.5.1.2 Greater Public Investment Lowering Commercialization Risk

1.5.1.3 Crop Value-Chain Pressure Pushing Farmers and Buyers toward Climate-Resilient Crops

1.5.2 Market Restraints

1.5.2.1 Regulatory Uncertainty and Divergent Global Policies on Gene Editing and Biotech Slow Commercial Deployment

1.5.2.2 High Upfront R&D Costs, Long Validation Timelines, and Limited Breeding Capacity Constrain Scalability

1.5.3 Market Opportunities

1.5.3.1 Fast Growth Potential in Emerging Markets where Climate Impact and Seed Adoption Gaps Coincide

1.5.3.2 New Tech Platforms and Techniques for Climate-Adaptive Crop Breeding

2 APPLICATION

2.1 Application Summary

2.2 Climate-Adaptive Crop Breeding Market (by End User)

- 2.2.1 Farmers and Growers
- 2.2.2 Agribusinesses and Cooperatives
- 2.2.3 Research and Academia
- 2.2.4 Others

3 PRODUCTS

3.1 Product Summary

3.2 Climate-Adaptive Crop Breeding Market (by Crop Type)

- 3.2.1 Cereals
- 3.2.2 Fruits and Vegetables
- 3.2.3 Legumes
- 3.2.4 Others

3.3 Climate-Adaptive Crop Breeding Market (by Traits)

- 3.3.1 Drought Tolerance
- 3.3.2 Heat Tolerance
- 3.3.3 Flood Tolerance
- 3.3.4 Others

3.4 Climate-Adaptive Crop Breeding Market (by Breeding Technique)

- 3.4.1 Genome Editing
- 3.4.2 Conventional Breeding
- 3.4.3 Marker-Assisted Breeding
- 3.4.4 Mutation Breeding
- 3.4.5 Others

4 REGION

4.1 Regional Summary

4.2 North America

- 4.2.1 Regional Overview
- 4.2.2 Driving Factors for Market Growth
- 4.2.3 Factors Challenging the Market
- 4.2.4 Application
- 4.2.5 Product
- 4.2.6 North America Climate-Adaptive Crop Breeding Market (by Country)
 - 4.2.6.1 U.S.
 - 4.2.6.1.1 Application
 - 4.2.6.1.2 Product

- 4.2.6.2 Canada
 - 4.2.6.2.1 Application
 - 4.2.6.2.2 Product
- 4.2.6.3 Mexico
 - 4.2.6.3.1 Application
 - 4.2.6.3.2 Product
- 4.3 Europe
 - 4.3.1 Regional Overview
 - 4.3.2 Driving Factors for Market Growth
 - 4.3.3 Factors Challenging the Market
 - 4.3.4 Application
 - 4.3.5 Product
 - 4.3.6 Europe Climate-Adaptive Crop Breeding Market, by Country
 - 4.3.6.1 Germany
 - 4.3.6.1.1 Application
 - 4.3.6.1.2 Product
 - 4.3.6.2 France
 - 4.3.6.2.1 Application
 - 4.3.6.2.2 Product
 - 4.3.6.3 Italy
 - 4.3.6.3.1 Application
 - 4.3.6.3.2 Product
 - 4.3.6.4 U.K.
 - 4.3.6.4.1 Application
 - 4.3.6.4.2 Product
 - 4.3.6.5 Spain
 - 4.3.6.5.1 Application
 - 4.3.6.5.2 Product
 - 4.3.6.6 Rest-of-Europe
 - 4.3.6.6.1 Application
 - 4.3.6.6.2 Product
- 4.4 Asia-Pacific
 - 4.4.1 Regional Overview
 - 4.4.2 Driving Factors for Market Growth
 - 4.4.3 Factors Challenging the Market
 - 4.4.4 Application
 - 4.4.5 Product
 - 4.4.6 Asia-Pacific Climate-Adaptive Crop Breeding Market, by Country
 - 4.4.6.1 China

- 4.4.6.1.1 Application
- 4.4.6.1.2 Product
- 4.4.6.2 Japan
 - 4.4.6.2.1 Application
 - 4.4.6.2.2 Product
- 4.4.6.3 South Korea
 - 4.4.6.3.1 Application
 - 4.4.6.3.2 Product
- 4.4.6.4 India
 - 4.4.6.4.1 Application
 - 4.4.6.4.2 Product
- 4.4.6.5 Australia and New Zealand
 - 4.4.6.5.1 Application
 - 4.4.6.5.2 Product
- 4.4.6.6 Thailand
 - 4.4.6.6.1 Application
 - 4.4.6.6.2 Product
- 4.4.6.7 Rest-of-Asia-Pacific
 - 4.4.6.7.1 Application
 - 4.4.6.7.2 Product
- 4.5 Rest-of-the-World
 - 4.5.1 Regional Overview
 - 4.5.2 Driving Factors for Market Growth
 - 4.5.3 Factors Challenging the Market
 - 4.5.4 Application
 - 4.5.5 Product
 - 4.5.6 Rest-of-the-World Climate-Adaptive Crop Breeding Market, by Region
 - 4.5.6.1 South America
 - 4.5.6.1.1 Application
 - 4.5.6.1.2 Product
 - 4.5.6.2 Middle East and Africa
 - 4.5.6.2.1 Application
 - 4.5.6.2.2 Product

5 MARKETS - COMPETITIVE BENCHMARKING & COMPANY PROFILES

- 5.1 Company Profiles
 - 5.1.1 BASF SE
 - 5.1.1.1 Overview

- 5.1.1.2 Top Products/Product Portfolio
- 5.1.1.3 Top Competitors
- 5.1.1.4 Target Customers
- 5.1.1.5 Key Personal
- 5.1.1.6 Analyst View
- 5.1.1.7 Market Share, 2024
- 5.1.2 Bayer AG
 - 5.1.2.1 Overview
 - 5.1.2.2 Top Products/Product Portfolio
 - 5.1.2.3 Top Competitors
 - 5.1.2.4 Target Customers
 - 5.1.2.5 Key Personal
 - 5.1.2.6 Analyst View
 - 5.1.2.7 Market Share, 2024
- 5.1.3 Corteva Inc.
 - 5.1.3.1 Overview
 - 5.1.3.2 Top Products/Product Portfolio
 - 5.1.3.3 Top Competitors
 - 5.1.3.4 Target Customers
 - 5.1.3.5 Key Personal
 - 5.1.3.6 Analyst View
 - 5.1.3.7 Market Share, 2024
- 5.1.4 DLF
 - 5.1.4.1 Overview
 - 5.1.4.2 Top Products/Product Portfolio
 - 5.1.4.3 Top Competitors
 - 5.1.4.4 Target Customers
 - 5.1.4.5 Key Personal
 - 5.1.4.6 Analyst View
 - 5.1.4.7 Market Share, 2024
- 5.1.5 Inari Agriculture Inc.
 - 5.1.5.1 Overview
 - 5.1.5.2 Top Products/Product Portfolio
 - 5.1.5.3 Top Competitors
 - 5.1.5.4 Target Customers
 - 5.1.5.5 Key Personal
 - 5.1.5.6 Analyst View
 - 5.1.5.7 Market Share, 2024
- 5.1.6 Syngenta Group Co Ltd.

- 5.1.6.1 Overview
- 5.1.6.2 Top Products/Product Portfolio
- 5.1.6.3 Top Competitors
- 5.1.6.4 Target Customers
- 5.1.6.5 Key Personal
- 5.1.6.6 Analyst View
- 5.1.6.7 Market Share, 2024
- 5.1.7 East-West Seed
 - 5.1.7.1 Overview
 - 5.1.7.2 Top Products/Product Portfolio
 - 5.1.7.3 Top Competitors
 - 5.1.7.4 Target Customers
 - 5.1.7.5 Key Personal
 - 5.1.7.6 Analyst View
 - 5.1.7.7 Market Share, 2024
- 5.1.8 JK Agri Genetics Limited
 - 5.1.8.1 Overview
 - 5.1.8.2 Top Products/Product Portfolio
 - 5.1.8.3 Top Competitors
 - 5.1.8.4 Target Customers
 - 5.1.8.5 Key Personal
 - 5.1.8.6 Analyst View
 - 5.1.8.7 Market Share, 2024
- 5.1.9 Enza Zaden
 - 5.1.9.1 Overview
 - 5.1.9.2 Top Products/Product Portfolio
 - 5.1.9.3 Top Competitors
 - 5.1.9.4 Target Customers
 - 5.1.9.5 Key Personal
 - 5.1.9.6 Analyst View
 - 5.1.9.7 Market Share, 2024
- 5.1.10 KWS SAAT SE & Co. KGaA
 - 5.1.10.1 Overview
 - 5.1.10.2 Top Products/Product Portfolio
 - 5.1.10.3 Top Competitors
 - 5.1.10.4 Target Customers
 - 5.1.10.5 Key Personal
 - 5.1.10.6 Analyst View
 - 5.1.10.7 Market Share, 2024

- 5.1.11 NuFarm Limited
 - 5.1.11.1 Overview
 - 5.1.11.2 Top Products/Product Portfolio
 - 5.1.11.3 Top Competitors
 - 5.1.11.4 Target Customers
 - 5.1.11.5 Key Personal
 - 5.1.11.6 Analyst View
 - 5.1.11.7 Market Share, 2024
- 5.1.12 Sakata Seed Corporation
 - 5.1.12.1 Overview
 - 5.1.12.2 Top Products/Product Portfolio
 - 5.1.12.3 Top Competitors
 - 5.1.12.4 Target Customers
 - 5.1.12.5 Key Personal
 - 5.1.12.6 Analyst View
 - 5.1.12.7 Market Share, 2024
- 5.1.13 Stine Seed Company
 - 5.1.13.1 Overview
 - 5.1.13.2 Top Products/Product Portfolio
 - 5.1.13.3 Top Competitors
 - 5.1.13.4 Target Customers
 - 5.1.13.5 Key Personal
 - 5.1.13.6 Analyst View
 - 5.1.13.7 Market Share, 2024
- 5.1.14 Limagrain
 - 5.1.14.1 Overview
 - 5.1.14.2 Top Products/Product Portfolio
 - 5.1.14.3 Top Competitors
 - 5.1.14.4 Target Customers
 - 5.1.14.5 Key Personal
 - 5.1.14.6 Analyst View
 - 5.1.14.7 Market Share, 2024
- 5.1.15 TROPIC
 - 5.1.15.1 Overview
 - 5.1.15.2 Top Products/Product Portfolio
 - 5.1.15.3 Top Competitors
 - 5.1.15.4 Target Customers
 - 5.1.15.5 Key Personal
 - 5.1.15.6 Analyst View

5.1.15.7 Market Share, 2024

6 RESEARCH METHODOLOGY

6.1 Data Sources

6.1.1 Primary Data Sources

6.1.2 Secondary Data Sources

6.1.3 Data Triangulation

6.2 Market Estimation and Forecast

List Of Figures

LIST OF FIGURES

Figure 1: Climate-Adaptive Crop Breeding Market (by Scenario), Million, 2025, 2030, and 2035

Figure 2: Global Climate-Adaptive Crop Breeding Market, 2024-2035

Figure 3: Top Countries, Global Climate-Adaptive Crop Breeding Market, \$Million, 2024

Figure 4: Global Market Snapshot, 2024

Figure 5: Global Climate-Adaptive Crop Breeding Market, \$Million, 2024 and 2035

Figure 6: Climate-Adaptive Crop Breeding Market (by Application), \$Million, 2024, 2030, and 2035

Figure 7: Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024, 2030, and 2035

Figure 8: Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024, 2030, and 2035

Figure 9: Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024, 2030, and 2035

Figure 10: Climate-Adaptive Crop Breeding Market Segmentation

Figure 11: Adoption Rate of Trait-Stacked Upland Cotton (HT and BT) in the U.S., %, 2015-2024

Figure 12: Climate-Adaptive Crop Breeding Value Chain

Figure 13: Patent Filing Trend by Country

Figure 14: Patent Filing Trend by Company

Figure 15: Percentage of Moderate or Severe Food Insecurity, Algeria

Figure 16: Global Climate-Adaptive Crop Breeding Market (by Application), \$Million, 2024, 2030, and 2035

Figure 17: Global Climate-Adaptive Crop Breeding Market, Farmers and Growers Value, \$Million, 2024-2035

Figure 18: Global Climate-Adaptive Crop Breeding Market, Agribusinesses and Cooperatives Value, \$Million, 2024-2035

Figure 19: Global Climate-Adaptive Crop Breeding Market, Research and Academia Value, \$Million, 2024-2035

Figure 20: Global Climate-Adaptive Crop Breeding Market, Others, Value, \$Million, 2024-2035

Figure 21: Global Climate-Adaptive Crop Breeding Market, (by Crop Type) Value, \$Million, 2024, 2030, and 2035

Figure 22: Global Climate-Adaptive Crop Breeding Market, (by Traits) Value, \$Million, 2024, 2030, and 2035

Figure 23: Global Climate-Adaptive Crop Breeding Market, (by Breeding Technique) Value, \$Million, 2024, 2030, and 2035

Figure 24: Global Climate-Adaptive Crop Breeding Market, Cereals Value, \$Million, 2024-2035

Figure 25: Global Climate-Adaptive Crop Breeding Market, Fruits and Vegetables Value, \$Million, 2024-2035

Figure 26: Global Climate-Adaptive Crop Breeding Market, Legumes Value, \$Million, 2024-2035

Figure 27: Global Climate-Adaptive Crop Breeding Market, Others, Value, \$Million, 2024-2035

Figure 28: Global Climate-Adaptive Crop Breeding Market, Drought Tolerance Value, \$Million, 2024-2035

Figure 29: Global Climate-Adaptive Crop Breeding Market, Heat Tolerance Value, \$Million, 2024-2035

Figure 30: Global Climate-Adaptive Crop Breeding Market, Flood Tolerance Value, \$Million, 2024-2035

Figure 31: Global Climate-Adaptive Crop Breeding Market, Others, Value, \$Million, 2024-2035

Figure 32: Global Climate-Adaptive Crop Breeding Market, Genome Editing, Value, \$Million, 2024-2035

Figure 33: Global Climate-Adaptive Crop Breeding Market, Conventional Breeding, Value, \$Million, 2024-2035

Figure 34: Global Climate-Adaptive Crop Breeding Market, Marker-Assisted Breeding, Value, \$Million, 2024-2035

Figure 35: Global Climate-Adaptive Crop Breeding Market, Mutation Breeding, Value, \$Million, 2024-2035

Figure 36: Global Climate-Adaptive Crop Breeding Market, Others, Value, \$Million, 2024-2035

Figure 37: U.S. Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 38: Canada Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 39: Mexico Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 40: Germany Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 41: France Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 42: Italy Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 43: U.K. Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 44: Spain Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 45: Rest-of-Europe Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 46: China Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 47: Japan Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 48: South Korea Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 49: India Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 50: Australia and New Zealand Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 51: Thailand Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 52: Rest-of-Asia-Pacific Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 53: South America Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 54: Middle East and Africa Climate-Adaptive Crop Breeding Market, \$Million, 2024-2035

Figure 55: Data Triangulation

Figure 56: Top-Down and Bottom-Up Approach

Figure 57: Assumptions and Limitations

List Of Tables

LIST OF TABLES

Table 1: Market Snapshot

Table 2: Examples of High-Throughput Phenotyping Applied in Arabidopsis or Crops

Table 3: Latest Guidelines for Climate-Adaptive Crop Breeding Market

Table 4: Development of New Crop Varieties Resistant to Abiotic-Stressors

Table 5: Features of Prime Editor Variants

Table 6: Illustrious Examples of Climate-Adaptive Crop Breeding in Oilseeds:

Table 7: Climate-Adaptive Crop Breeding Market (by Region), \$Million, 2024-2035

Table 8: North America Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 9: North America Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 10: North America Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 11: North America Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 12: U.S. Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 13: U.S. Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 14: U.S. Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 15: U.S. Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 16: Canada Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 17: Canada Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 18: Canada Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 19: Canada Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 20: Mexico Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 21: Mexico Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 22: Mexico Climate-Adaptive Crop Breeding Market (by Traits), \$Million,

2024-2035

Table 23: Mexico Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 24: Europe Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 25: Europe Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 26: Europe Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 27: Europe Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 28: Germany Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 29: Germany Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 30: Germany Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 31: Germany Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 32: France Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 33: France Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 34: France Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 35: France Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 36: Italy Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 37: Italy Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 38: Italy Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 39: Italy Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 40: U.K. Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 41: U.K. Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 42: U.K. Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 43: U.K. Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 44: Spain Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 45: Spain Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 46: Spain Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 47: Spain Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 48: Rest-of-Europe Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 49: Rest-of-Europe Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 50: Rest-of-Europe Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 51: Rest-of-Europe Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 52: Asia-Pacific Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 53: Asia-Pacific Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 54: Asia-Pacific Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 55: Asia-Pacific Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 56: China Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 57: China Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 58: China Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 59: China Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 60: Japan Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 61: Japan Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 62: Japan Climate-Adaptive Crop Breeding Market (by Traits), \$Million,

2024-2035

Table 63: Japan Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 64: South Korea Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 65: South Korea Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 66: South Korea Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 67: South Korea Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 68: India Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 69: India Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 70: India Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 71: India Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 72: Australia and New Zealand Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 73: Australia and New Zealand Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 74: Australia and New Zealand Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 75: Australia and New Zealand Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 76: Thailand Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 77: Thailand Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 78: Thailand Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 79: Thailand Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 80: Rest-of-Asia-Pacific Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 81: Rest-of-Asia-Pacific Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 82: Rest-of-Asia-Pacific Climate-Adaptive Crop Breeding Market (by Traits),

\$Million, 2024-2035

Table 83: Rest-of-Asia-Pacific Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 84: Rest-of-the-World Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 85: Rest-of-the-World Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 86: Rest-of-the-World Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 87: Rest-of-the-World Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 88: South America Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 89: South America Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 90: South America Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 91: South America Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 92: Middle East and Africa Climate-Adaptive Crop Breeding Market (by End-User), \$Million, 2024-2035

Table 93: Middle East and Africa Climate-Adaptive Crop Breeding Market (by Crop Type), \$Million, 2024-2035

Table 94: Middle East and Africa Climate-Adaptive Crop Breeding Market (by Traits), \$Million, 2024-2035

Table 95: Middle East and Africa Climate-Adaptive Crop Breeding Market (by Breeding Technique), \$Million, 2024-2035

Table 96: Global Market Share, 2024

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