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Global Seeds Market Size Study and Forecast by Seed Type (Conventional Seeds, Genetically Modified Seeds, Hybrid Seeds), By Crop Type (Cereals: Corn, Wheat, Rice, Others; Oilseeds & Pulses: Soybean, Cotton, Canola, Others; Fruits & Vegetables: Solanaceae, Cucurbits, Leafy Vegetables, Citrus Fruits, Root & Bulb, Rosacea, Others; Others), By Cultivation Method, and Regional Forecasts 2026–2036

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Abstracts

The Global Seeds Market, valued at USD 63.47 Billion in 2025, is projected to reach USD 131.42 Billion by 2036, expanding at a CAGR of 7.0% during the forecast period. The market is composed of the production, breeding, processing, treatment and commercialization of high quality seeds that contribute to increase agricultural productivity, crop resilience, yield potential and food security. “Modern seed technologies are crucial to world agriculture, allowing improved crop performance, pest and disease resistance, climate adaptability and efficient resource use. By Seed Type, the market is segmented into Conventional Seeds, Genetically Modified (GM) Seeds and Hybrid Seeds. By Crop Type, the market is segmented into major categories such as Cereals, Oilseeds & Pulses, Fruits & Vegetables and Others. By Cultivation Type, the market caters to Protected and Open Field farming.

The market is witnessing a steady growth due to the rising global demand for food, increasing adoption of high yielding varieties of seeds, expansion in commercial agriculture and rising investments in agricultural biotechnology. Farmers are increasingly resorting to hybrid and genetically improved seeds to increase productivity,

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improve tolerance to biotic and abiotic stresses and maximize the return from cultivation. Major advances in technology including molecular breeding, marker-assisted selection, genome editing, seed treatment technologies, digital agriculture and precision farming technologies are improving seed performance and helping to accelerate the development of climate resilient crop varieties. Moreover, the growing investments in protected cultivation, regenerative farming, crop diversification, and sustainable agriculture are further contributing to the market growth. Moreover, the evolution of strategic alliances between seed companies, biotech companies, agricultural research organizations, and government organizations is anticipated to support the development of the global seeds market in the long run during the forecast period.

Global Seeds Market: Key Highlights

The global seeds market size was valued at US$ 63.47 Billion in 2025, according to the latest report by IMARC Group. The market is projected to reach US$ 89.87 Billion by 2030, growing at a CAGR of 6.0% during 2025-2030.

The market is projected to reach USD 131.42 Billion by 2036, growing at a CAGR of 7.0% during 2026-2036. Growth is fueled by increasing demand for climate-resilient crops, precision agriculture, hybrid seed adoption, biotech innovations, and government programs promoting sustainable agricultural productivity.

The Asia Pacific region is estimated to hold 38.9% share of the global market by 2025. China, India, Japan and Southeast Asia have wide production of agricultural products, large cultivation areas, increasing food consumption, growing adoption of hybrid seeds and growing agricultural biotechnology investments.

LAMEA is projected to witness the fastest growth with a CAGR of 7.8% during 2026-2036, owing to increasing commercial farming, rising demand for improved seed varieties, increasing agricultural modernization, and increasing investments in food security initiatives across Latin America, Middle East and Africa.

Hybrid Seeds are the leading segment in seed type and expected to account for a market share of 48.6% in 2025. The segment is expected to lead in terms of yield potential, enhanced disease resistance and uniformity, together with the rising preference of farmers towards high performing crop varieties.

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Genetically Modified (GM) Seeds are expected to register the highest CAGR of 7.9% over the forecast period, owing to the increasing adoption of herbicide tolerant and insect resistant crops, improving productivity and expansion of regulatory approvals in key agricultural markets.

Cereals hold the major share in the crop type segment and are projected to account for 46.8% in 2025, owing to their extensive cultivation area, significant role in global food security, and substantial demand for staple crops such as corn, wheat, and rice.

Fruits & Vegetables are expected to record the highest CAGR of 8.3% in the forecast period, 2026-2036. The growth is due to increasing consumption of fresh fruits and vegetables, increasing protected cultivation, increasing demand for premium horticultural crops, and continuous development of high-value hybrid varieties.

Open Field cultivation is dominating the cultivation method segment with an estimated 84.2% share in 2025 due to large-scale cultivation of cereals, oilseeds, pulses and commercial row crops across major agricultural regions.

Growing investments in hybrid breeding, molecular breeding, genome editing, seed treatment technologies, climate-resilient crop development, precision agriculture, and digital farming platforms are anticipated to offer substantial long-term opportunities for seed companies, biotechnology firms, agricultural research organizations, and commercial growers.

Research Scope & Methodology

This research offers an in-depth strategic analysis of the Global Seeds Market with the help of the forecast period of 2026-2036. The report evaluates market size, revenue projections, competitive scenario, technological innovations, breeding advancements and emerging investment opportunities impacting the global seed market. The assessment covers the entire seed value chain, from plant breeding and genetic improvement to seed production, processing, treatment, certification, distribution and commercial cultivation of major agricultural crops. The report segments the market into the following categories: By Seed Type Conventional Seeds Genetically Modified Seeds Hybrid Seeds By Crop Type Cereals Oilseeds & Pulses Fruits & Vegetables Others By

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Cultivation Method Protected Open Field By Region North America Europe Asia Pacific LAMEA In the regional analysis, the study covers agricultural production, adoption of improved seed varieties, advancements in biotechnology, regulatory framework, food security initiatives, and investments in sustainable farming affecting regional market growth. The report further analyzes the progress in hybrid breeding, molecular breeding, genome editing, marker-assisted selection, seed treatment technologies, digital agriculture, precision farming, and climate-resilient crop development that continue to transform the competitive landscape of the global seeds market.

The research methodology involves extensive primary and secondary research to provide reliable market intelligence and robust long term forecasting. The primary research includes interviews with seed companies, biotechnology companies, agricultural research institutions, commercial growers, distributors, agronomists, regulatory bodies and industry experts in key global markets. Secondary research involves the use of agricultural organization publications, governmental agency publications, annual reports, investor presentations, scientific journals, plant breeding research, seed industry reports and validated market intelligence sources. A combination of top-down and bottom-up approaches is used to derive market estimates and validate the market numbers to ensure the information is consistent across all segments and regional analyses. Forecast Models include historical crop cultivation trends, seed adoption rates, agricultural investment levels, biotechnology innovation, regulatory changes, climate adaptation strategies and macroeconomic indicators. Competitive benchmarking offers a holistic view of the changing competitive landscape of the Global Seeds Market by providing a competitive assessment of the key players in the market based on their breeding capabilities, product portfolio, geographical presence, investment in research and development, intellectual property, strategic collaborations, and innovation pipelines.

Key Market Segments

By Seed Type:

- Conventional Seeds
- Genetically Modified Seeds
- Hybrid Seeds

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By Crop Type:

- Cereals
  - Corn
  - Wheat
  - Rice
  - Others
- Oilseeds & Pulses
  - Soybean
  - Cotton
  - Canola
  - Others
- Fruits & Vegetables
  - Solanaceae
  - Cucurbits
  - Leafy Vegetables
  - Citrus Fruits
  - Root & Bulb
  - Rosacea
  - Others
- Others

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By Cultivation Method:

- Protected
- Open Field

Key Market Players

- Bayer AG
- Corteva Agriscience
- Syngenta AG
- BASF SE
- KWS SAAT SE & Co. KGaA
- Limagrain Group
- Sakata Seed Corporation
- Advanta Seeds
- DLF Seeds A/S
- Rijk Zwaan

Industry Trends

Hybrid breeding continues to be the main engine of innovation in the global seed industry as companies create high-yielding, disease-resistant and climate-resilient crop varieties that enhance productivity while improving tolerance to drought, heat, salinity and other environmental stresses.

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Precision breeding technologies such as marker-assisted selection, genomic selection, genome editing, and advanced phenotyping are accelerating seed development by improving breeding efficiency, shortening product development timelines, and enabling rapid commercialization of superior crop varieties.

Seed companies are increasingly investing in drought-tolerant, flood-resistant, heat-tolerant and stress-resilient seeds to help farmers adapt to fluctuating climatic conditions and improve food security. Climate-resilient agriculture has become a major industry priority.

The seed treatment technology is progressing with biological coatings, microbial inoculants, nutrient enhancement, biostimulants and precision seed protection solutions that promote germination, early crop establishment, nutrient uptake and resistance to pests and diseases.

Digital agriculture is increasingly intertwined with seed technologies via AI-driven crop modelling, precision planting, satellite surveillance, predictive analytics and farm management platforms that optimise seed choice, planting density and field productivity.

With the growth of greenhouse and controlled environment agriculture worldwide, there is increasing demand for high-performance vegetable, fruit and specialty crop seeds with improved uniformity, productivity and disease resistance.

Initiatives for sustainable agriculture are driving the uptake of improved seed varieties that boost efficiency in the use of resources, cut the need for fertilizers and pesticides, raise efficiency in the use of water, and underpin regenerative farming practices.

Seed development is still an active field of biotechnology with increasing investments in genetically modified (GM) crops, gene modification technologies, molecular breeding, and next-generation genetic improvement platforms to improve yield, nutritional quality, and crop resilience.

The constant innovation in plant breeding, seed genetics and climate-smart agriculture is being driven by these strategic alliances involving seed companies, biotech companies, agricultural research institutes, universities, digital agriculture providers and government organizations.

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Investments in hybrid breeding, genome editing, molecular breeding, biological seed treatments, digital agriculture, precision farming, climate-resilient crop development and sustainable seed technologies are expected to underpin long-term growth of the global seeds market through 2036.

Market Determinants

Growing Global Food Demand and Agricultural Productivity Requirements: Rising population growth, increasing food consumption, and shrinking arable land are major drivers of the global seeds market. Farmers are increasingly adopting high-yielding, hybrid, and genetically improved seed varieties to maximize crop productivity, improve resource efficiency, and strengthen global food security.

Advancements in Plant Breeding and Seed Biotechnology: Continuous innovation in hybrid breeding, molecular breeding, marker-assisted selection, genome editing, genetically modified (GM) crops, and seed treatment technologies is significantly improving crop yield, disease resistance, climate resilience, and nutritional quality. These technological advancements continue to accelerate adoption of advanced seed varieties worldwide.

Increasing Adoption of Climate-Resilient and Sustainable Farming Practices: Growing climate variability, water scarcity, soil degradation, and changing pest pressures are encouraging farmers to adopt drought-tolerant, heat-resistant, disease-resistant, and stress-tolerant seed varieties. Sustainable agriculture initiatives and precision farming practices are further supporting demand for improved seeds.

Expansion of Commercial Agriculture and Protected Cultivation: Increasing commercialization of agriculture, expanding greenhouse farming, rising horticultural production, and growing investments in high-value crops are driving demand for premium hybrid seeds and specialized crop varieties capable of delivering consistent yields and superior quality.

High Research, Development, and Seed Production Costs: Developing new seed varieties requires significant investment in breeding programs, biotechnology research, field trials, regulatory approvals, intellectual property

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protection, and large-scale seed multiplication. These high development costs can limit innovation among smaller seed companies and increase product commercialization timelines.

Regulatory Challenges and Climate-Related Production Risks: Diverse regulatory frameworks governing genetically modified crops, seed certification, biosafety approvals, and intellectual property rights create commercialization challenges across global markets. In addition, unpredictable weather conditions, disease outbreaks, and seed production risks can affect seed availability, quality, and supply chain stability.

Opportunity Mapping Based on Market Trends

Expansion of Climate-Resilient and Stress-Tolerant Seed Development: Growing climate variability, extreme weather events, and increasing pressure on agricultural productivity are creating significant opportunities for seed companies to develop drought-tolerant, heat-resistant, flood-tolerant, and disease-resistant crop varieties that improve farm resilience while supporting sustainable food production.

Growth of Precision Agriculture and Digital Farming: Increasing adoption of AI-powered farm management, precision planting, satellite monitoring, digital agronomy platforms, and variable-rate application technologies is creating substantial opportunities for advanced seed varieties optimized for precision agriculture, enabling higher productivity, improved resource efficiency, and data-driven crop management.

Rising Demand for High-Value Horticultural and Specialty Crops: Expanding protected cultivation, greenhouse farming, urban agriculture, and premium fruit and vegetable production are creating opportunities for seed manufacturers to commercialize high-performance hybrid seeds with superior yield, quality, disease resistance, and extended shelf life for high-value horticultural markets.

Expansion of Agricultural Biotechnology and Emerging Farming Markets: Increasing investments in molecular breeding, genome editing, biological seed treatments, regenerative agriculture, and sustainable crop production across Asia Pacific, Latin America, the Middle East, and Africa are creating substantial long-term opportunities. Companies investing in advanced breeding

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technologies, climate-smart crop development, precision agriculture integration, strategic research collaborations, and next-generation seed innovations will be well positioned to capitalize on the accelerating global demand for high-performance seeds through 2036.

Value-Creating Segments and Growth Pockets

Hybrid Seeds Dominate the Market While Genetically Modified Seeds Register the Fastest Growth

The Hybrid Seeds segment accounted for the largest market share of an estimated 48.6% in 2025, driven by higher yield potential, improved disease resistance, greater crop uniformity, enhanced stress tolerance, and increasing farmer adoption of high-performance seed varieties across major agricultural crops. Hybrid seeds offer superior productivity, better adaptability to varying climatic conditions, and improved resistance against pests and diseases, enabling farmers to maximize crop output and profitability. Growing demand for food security, rising investments in agricultural research, and continuous development of advanced hybrid seed technologies continue to strengthen the segment's leadership. Increasing adoption of precision agriculture and modern farming practices further supports sustained market growth.

The Genetically Modified (GM) Seeds segment is projected to register the highest CAGR of 7.9% during 2026–2036, supported by increasing adoption of herbicide-tolerant and insect-resistant crops, continuous biotechnology innovation, expanding regulatory approvals, and growing demand for advanced seed technologies that improve productivity, resilience, and resource efficiency.

Cereals Generate the Highest Demand While Fruits & Vegetables Experience the Fastest Expansion

The Cereals segment accounted for the largest market share of approximately 46.8% in 2025, driven by extensive cultivation of staple crops such as corn, wheat, rice, barley, and other cereals that form the foundation of global food production. Rising population growth, increasing food demand, and widespread adoption of high-yield hybrid and improved cereal seed varieties continue to reinforce the segment's leadership. Governments and agricultural organizations are increasingly promoting improved seed technologies to enhance food security, crop productivity, and climate resilience. Continuous investments in cereal breeding programs and seed innovation further

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support long-term market expansion.

The Fruits & Vegetables segment is projected to register the highest CAGR of 8.3% during 2026–2036, supported by expanding protected cultivation, increasing consumption of fresh produce, rising demand for premium horticultural crops, continuous innovation in hybrid fruit and vegetable seeds, and growing adoption of high-value specialty crop production.

Open Field Cultivation Leads the Market While Protected Cultivation Records the Fastest Growth

The Open Field segment represented the largest market share of approximately 84.2% in 2025, driven by extensive cultivation of cereals, oilseeds, pulses, cotton, and other large-acreage commercial crops across major agricultural regions worldwide. Open-field farming remains the dominant cultivation method due to its suitability for large-scale crop production, established farming practices, and widespread availability of agricultural land. Continuous improvements in seed quality, mechanization, irrigation systems, and precision farming technologies continue to strengthen the segment's leadership.

The Protected Cultivation segment is projected to register the highest CAGR of 8.6% during 2026–2036, supported by increasing greenhouse farming, controlled-environment agriculture, vertical farming, expanding production of high-value horticultural crops, and rising demand for premium-quality fruits and vegetables cultivated using specialized, high-performance seed varieties.

Regional Market Assessment

Asia Pacific

Asia Pacific is projected to dominate the global seeds market, accounting for an estimated 38.9% market share in 2025. The region's leadership is driven by extensive agricultural production, vast cultivation areas, rising food demand, increasing adoption of hybrid and improved seed varieties, and growing investments in agricultural biotechnology. Countries including China, India, Japan, and Southeast Asian nations continue promoting seed innovation through government-backed agricultural modernization programs, productivity enhancement initiatives, and food security policies. Rising adoption of precision agriculture, climate-resilient seed technologies, and advanced breeding techniques is further improving crop productivity across the

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region. Expanding commercial farming, increasing mechanization, and continuous investments in agricultural research and seed production infrastructure are expected to reinforce Asia Pacific's dominant position throughout the forecast period.

LAMEA

The LAMEA region is projected to register the highest CAGR of 7.8% during 2026–2036, driven by expanding commercial agriculture, increasing cultivation of export-oriented crops, rising adoption of certified and hybrid seeds, and growing investments in food security and agricultural modernization across Latin America, the Middle East, and Africa. Governments and private organizations are increasingly investing in improved seed distribution networks, modern farming practices, and agricultural biotechnology to enhance productivity and strengthen food supply chains. Rising demand for high-yield crop varieties, climate-resilient seeds, and sustainable farming solutions is creating significant market opportunities. Continued expansion of commercial farming operations and agricultural infrastructure is expected to support long-term regional market growth.

North America

North America represents a significant market for seeds, supported by advanced plant breeding technologies, widespread adoption of genetically modified and hybrid seeds, highly mechanized farming systems, and substantial investments in agricultural biotechnology. The United States and Canada continue leading innovation in precision agriculture, genome editing, climate-resilient crop development, and advanced seed breeding technologies that improve productivity, disease resistance, and environmental adaptability. Strong collaboration between research institutions, seed companies, and agricultural producers continues to accelerate the commercialization of high-performance seed varieties. Increasing emphasis on sustainable farming, digital agriculture, and next-generation breeding technologies is expected to strengthen North America's position in the global seeds market throughout the forecast period.

Europe

Europe represents a major market for seeds, driven by increasing demand for high-quality certified seeds, strong investments in sustainable agriculture, advanced breeding technologies, and stringent seed quality standards. Countries including Germany, France, the Netherlands, Italy, and Spain continue promoting innovation in hybrid breeding, vegetable seeds, climate-adaptive crop varieties, and sustainable agricultural practices. Growing focus on improving crop resilience, enhancing productivity, and

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reducing environmental impact is encouraging the adoption of advanced seed technologies. Investments in precision breeding, genomic research, and sustainable crop improvement programs continue to support market growth. Favorable regulatory frameworks, well-established agricultural research capabilities, and increasing demand for premium crop varieties are expected to sustain Europe's strong position in the global seeds market.

Recent Developments

May 2025: Bayer AG expanded its digital breeding and seed innovation programs by integrating advanced genomics and artificial intelligence to accelerate the development of climate-resilient crop varieties.

April 2025: Corteva Agriscience strengthened its seed portfolio through continued investments in hybrid breeding technologies and next-generation biotechnology platforms aimed at improving yield, disease resistance, and environmental adaptability.

October 2024: Syngenta AG introduced new high-performance hybrid seed varieties designed to enhance productivity, improve stress tolerance, and support sustainable agricultural practices across multiple crop categories.

August 2024: KWS SAAT SE & Co. KGaA expanded its research initiatives focused on advanced breeding technologies and climate-resilient seed development to address evolving global agricultural challenges.

Critical Business Questions Addressed

How will the Global Seeds Market evolve through 2036?

The report evaluates long-term market growth driven by increasing food demand, hybrid seed adoption, biotechnology innovation, climate-resilient breeding, and sustainable agricultural development.

Which seed type, crop type, and cultivation method segments will generate the greatest commercial opportunities?

The study identifies the dominant and fastest-growing market segments, enabling seed

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companies, biotechnology firms, agricultural research organizations, growers, and investors to prioritize strategic investments.

What are the primary factors driving market expansion?

The report analyzes the influence of hybrid breeding, molecular breeding, genome editing, precision agriculture, seed treatment technologies, climate adaptation, and commercial farming on future market development.

Which regional markets present the strongest long-term investment potential?

The assessment compares agricultural production, biotechnology adoption, seed replacement rates, regulatory environments, and food security initiatives across major regions to identify the most attractive growth opportunities.

How can seed companies strengthen their competitive position in the evolving industry?

The report examines strategic priorities including advanced breeding technologies, climate-smart crop development, digital agriculture integration, biological seed treatments, strategic partnerships, and research and development investments to support long-term competitive advantage.

Beyond the Forecast

> The seeds market will continue to evolve through advancements in hybrid breeding, genome editing, marker-assisted selection, molecular breeding, biological seed treatments, AI-enabled breeding platforms, and precision agriculture technologies, enabling higher crop productivity and improved climate resilience.
>
> Rising investments in climate-smart agriculture, protected cultivation, regenerative farming, digital agronomy, sustainable seed technologies, biotechnology innovation, and high-value horticultural crops will continue creating substantial opportunities for seed companies, biotechnology firms, agricultural research institutions, and commercial growers worldwide.
>
> As global agriculture increasingly prioritizes food security, climate adaptation, sustainable farming, improved crop productivity, and efficient resource utilization, companies investing in advanced breeding technologies, resilient

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seed genetics, precision agriculture integration, and next-generation biotechnology platforms will be well positioned to capitalize on long-term growth opportunities in the global seeds market through 2036.

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