

Global Seed Health Testing Services Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global Seed Health Testing Services market size is predicted to grow from US\$ 331 million in 2025 to US\$ 516 million in 2032; it is expected to grow at a CAGR of 6.5% from 2026 to 2032.

Seed health testing services refer to professional technical services in which specialized laboratories accept commissions from seed companies, breeding institutions, seed production organizations, traders, agricultural authorities, and research clients to detect pathogens transmitted through seed, determine test results, and issue reports for seed samples used in sowing, propagation, breeding, commercial sale, and international trade. The research scope mainly covers vegetable seeds, field crop seeds, legume seeds, oilseed crop seeds, forage and turfgrass seeds, flower seeds, forest seeds, and other seeds intended for propagation. The testing targets include fungi, bacteria, viruses, viroids, and plant parasitic nematodes carried on the seed surface, in the seed coat, endosperm, embryo, or associated impurities. The main service forms include single pathogen testing, multiple pathogen testing, commercial seed lot release testing, pre export phytosanitary support testing, confirmation of positive samples, urgent testing, and the development and validation of testing methods. The service process generally includes sample registration, confirmation of representative sampling, sample preparation, pathogen isolation or nucleic acid extraction, laboratory testing, quality control, result interpretation, and report issuance. Commonly used technologies include blotter incubation, agar plate culture, seed wash testing, microscopic identification, grow out testing, pathogenicity testing, enzyme linked immunosorbent assay, polymerase chain reaction, real time quantitative polymerase chain reaction, reverse transcription polymerase chain reaction, and high throughput sequencing. Key evaluation parameters include sample quantity, detection limit, sensitivity, specificity, repeatability, turnaround time, number of pathogens covered, and laboratory accreditation scope. These services

are mainly used for seed production quality control, commercial lot release, cross border trade compliance, phytosanitary support, breeding material screening, evaluation of seed treatment effectiveness, and disease risk tracing.

The upstream segment of the seed health testing services industry includes culture media, antibodies, nucleic acid extraction reagents, primers and probes, reference strains, quality control materials, amplification instruments, sequencing platforms, and laboratory information systems. The midstream segment consists of commercial laboratories, fee based public laboratories, and research service platforms that undertake sample receipt, testing, confirmation, and report delivery. The downstream segment connects seed companies, breeding institutions, seed production bases, traders, agricultural regulatory authorities, and research users. The value of the industry is shifting from the confirmation of individual pathogens toward seed lot risk management, export compliance, and quality control throughout the production and distribution process.

The global supply structure is characterized by relatively mature professional laboratories and public testing systems in Europe and North America, while testing capacity is becoming increasingly localized in Asian seed production regions. Europe has accumulated substantial expertise in horticultural and vegetable seed testing and method standardization. North America has developed a parallel structure involving commercial laboratories, university laboratories, and government accreditation systems. Australia and New Zealand have developed import and export testing capacity supported by strict biosecurity systems. Integrated testing groups are expanding their coverage through acquisitions and laboratory consolidation, while specialized institutions remain competitive by focusing on particular crops, specific pathogens, and rapid service delivery.

Demand is centered on vegetable and horticultural seeds, with field crops, legumes, forage crops, turfgrass, flowers, and forest seeds providing additional demand. High value hybrid seeds, parental seeds, and seeds traded across borders generally require stricter evidence of pathogen absence. Testing of a single seed lot is shifting from individual pathogen analysis toward combined testing for multiple pathogens. Technology is gradually moving from conventional culture methods, microscopic observation, and enzyme linked immunosorbent assays toward polymerase chain reaction, real time quantitative testing, and high throughput sequencing. Conventional methods remain necessary for confirming viable pathogens and conducting pathogenicity verification.

The policy environment will continue to reinforce long term industry demand. International seed movement requires testing methods, sampling rules, laboratory quality systems, and phytosanitary documentation to operate in a coordinated manner. Regulation is extending from final inspection of individual consignments toward production process control, laboratory accreditation, and systematic risk management. Future capital investment will increasingly target automated molecular testing, multiple pathogen detection, digital sample tracking, and regional laboratory expansion. Local service capabilities near seed production bases in Asia and Latin America are expected to strengthen. Service providers with standardized methods, international recognition, rapid response capabilities, and the ability to confirm complex positive results are likely to develop more stable customer relationships.

Report Scope

LPI (LP Information)' newest research report, the “Seed Health Testing Services Industry Forecast” looks at past sales and reviews total world Seed Health Testing Services sales in 2025, providing a comprehensive analysis by region and market sector of projected Seed Health Testing Services sales for 2026 through 2032. With Seed Health Testing Services sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US\$ millions of the world Seed Health Testing Services industry.

This Insight Report provides a comprehensive analysis of the global Seed Health Testing Services landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on Seed Health Testing Services portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms' unique position in an accelerating global Seed Health Testing Services market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for Seed Health Testing Services and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global Seed Health Testing Services.

This report presents a comprehensive overview, market shares, and growth

opportunities of Seed Health Testing Services market by product type, application, key players and key regions and countries.

Segmentation by Type:

Fungal Pathogen Testing

Bacterial Pathogen Testing

Viral Pathogen Testing

Viroid Testing

Nematode Testing

Others

Segmentation by Testing Method:

Culture and Microscopy Based Testing

Immunoassay Based Testing

Nucleic Acid Amplification Testing

Grow Out and Biological Assays

Sequencing Based Testing

Others

Segmentation by Application:

Vegetable Seeds

Cereal Seeds

Oilseed Crop Seeds

Pulse Seeds

Forage and Turfgrass Seeds

Flower and Ornamental Seeds

Others

This report also splits the market by region:

Americas

United States

Canada

Mexico

Brazil

APAC

China

Japan

Korea

Southeast Asia

India

Australia

Europe

Germany

France

UK

Italy

Russia

Middle East & Africa

Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

SGS SA

Eurofins Scientific SE

Naktuinbouw

California Seed and Plant Labs Inc.

GEVES

NIAB

AsureQuality Limited

Iowa State University Seed Science Center Seed Laboratory

Science and Advice for Scottish Agriculture

FASMAC Co., Ltd.

SoDak Labs Inc.

Oregon Department of Agriculture Plant Health Program

Indo American Hybrid Seeds India Pvt. Ltd.

Institute of Vegetables and Flowers Chinese Academy of Agricultural Sciences

Plant Health Diagnostic Service Elizabeth Macarthur Agricultural Institute

Crop Health Services Agriculture Victoria

North Dakota State Seed Department

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