

# **Seed Coating Market by Form, Additives (Polymers, Colorants, Minerals/Pumice, Active ingredients, Binders), Process (Film coating, Encrusting, Pelleting), Crops (Cereals & grains, Oilseed & pulses, Vegetables) and Region - Global Forecast to 2028**

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## **Abstracts**

The seed coating market is projected to grow from USD 2.0 Billion in 2023 to USD 3.1 Billion by 2028, at a CAGR of 8.5% during the forecast period. The quest for superior crop quality and yield is a primary motivator for advanced seed coating solutions. These coatings ensure improved seed performance, shielding against diseases and pests, thereby enhancing crop quality. According to the Food and Agriculture Organization of the United Nations (FAO), the growth of the seed coating market is being driven by the increasing demand for high-quality seeds, the growing awareness of the benefits of seed coating, the expanding range of seed coating products, and the growing investment in seed coating research and development. High-quality seeds are more likely to be coated because they are a valuable investment for farmers. Farmers are willing to pay more for high-quality seeds because they know that these seeds will produce higher yields and more valuable crops. Seed coatings are tailored to fortify seed quality and safeguard against pests, diseases, and adverse environmental conditions. These coatings are instrumental in promoting agricultural efficiency and boosting crop resilience. Seed coating companies are increasingly recognizing the importance of high-quality seeds. As a result, they are developing new products and services specifically for high-quality seeds. This is making seed coating more accessible and affordable for farmers who are using high-quality seeds.

During the projected period, the polymer gels category within the spectrum of polymer types is anticipated to exhibit the most rapid growth, boasting the highest Compound Annual Growth Rate (CAGR).

Within the domain of seed coating technology, a continuous evolution is evident, marked by the integration of pioneering advancements in polymer-based, biodegradable, and smart coatings. These innovations serve as instrumental enhancements, fortifying seeds, fostering improved germination rates, and ultimately elevating crop yields. Notably, polymer gels stand out as versatile and impactful tools that drive substantial improvements in seed coatings. Their utility lies in controlled release mechanisms for nutrients and active ingredients, bolstering seed adhesion, reducing water loss, and fortifying soil structure. Moreover, the integration of polymer gels brings about a reduction in pesticide utilization and a concurrent increase in crop yields. Recent insights highlighted in a 2021 publication in the journal ACS Nano shed light on revolutionary research conducted by the University of California, Davis. Their pioneering work led to the development of a novel breed of polymer gel seed coatings designed to precisely dispense nutrients and agrochemicals to seeds in a controlled manner. Comprising a biocompatible and biodegradable polymer, this coating encapsulates various compounds like fertilizers, pesticides, and herbicides. Upon seed planting, this coating gradually dissolves, releasing compounds into the soil over time. This controlled release mechanism significantly enhances seed germination and seedling growth while curbing the need for agrochemicals. Rigorous testing across diverse crops - including corn, soybeans, and tomatoes - showcased remarkable results, significantly boosting both seed germination and seedling growth while reducing agrochemical usage by up to 50%.

Biodegradable polymer gels emerge as a promising paradigm in seed coating materials, showcasing numerous advantages over traditional counterparts. Crafted from biodegradable polymers such as cellulose derivatives, alginate, and starch, these materials decompose through the action of soil microorganisms, leaving no harmful residues. This attribute resonates with sustainable agricultural practices, presenting a more environmentally conscious choice for seed coating applications, aligning with evolving business strategies and market demands for environmentally friendly solutions.

Colorants stand as the pivotal force, ranking second in dominance within the additive segment of the market.

Colorants, the key players in the additive segment, wield significant influence in seed coatings. These additives not only enhance seed appearance for consumer appeal but also serve to differentiate seed varieties or signify specific treatments like fungicides or insecticides. Leading companies such as BASF SE, Syngenta, DSM, and Clariant offer a diverse range of both organic and inorganic colorants. These companies are driving

innovation, developing more robust colorants resistant to fading and compatible with a wider array of seed coating formulations. The Asia Pacific market is poised for rapid growth in seed coating colorants, driven by increased adoption of precision agriculture practices and growing farmer demand for colored seeds. This regional trend reflects an emphasis on technological advancements and the pursuit of more efficient agricultural practices. The continuous evolution of durable, versatile, and visually appealing colorants in seed coatings mirrors the changing landscape and demands within the agriculture industry.

The break-up of the profile of primary participants in the seed coating market:

By Company Type: Tier 1 – 45%, Tier 2 – 35%, and Tier 3 – 55%

By Designation: C Level – 40%, Director Level – 30%, Others-30%

By Region: North America – 35%, Europe – 20%, Asia Pacific – 30%, and Rest of the World –15%

Prominent companies Solvay (Belgium), BASF SE (Germany), Corda International Plc (UK), DSM (Netherlands), Clariant (Switzerland), and Sensient Colors LLC (US) among others.

Research Coverage:

This research report categorizes the seed coating market by Additive (Polymers, Colorants, Minerals/Pumice, Active Ingredients, Binders, and Other additives), Process (Film Coating, Encrusting, Pelleting), Form (Powder and Liquid), and Crop Type (Cereals & grains, Oilseed & pulses, Vegetables, Flowers & ornamentals, and Other crop types), and Region (North America, Europe, Asia Pacific, RoW). The report covers information about the key factors, such as drivers, restraints, opportunities, and challenges impacting the growth of the seed coating market. It also provides a detailed analysis of the major players in the market including their business overview, products offered; key strategies; partnerships, new product launches, and acquisitions. Competitive benchmarking of upcoming startups in the seed coating market is covered in this report.

Reasons to buy this report:

The report will help the market leaders/new entrants in this market with information on the closest approximations of the revenue numbers for the overall seed coating market and the subsegments. This report will help stakeholders understand the competitive landscape and gain more insights to position their businesses better and plan suitable go-to-market strategies. The report also helps stakeholders understand the pulse of the market and provides them with information on key market drivers, restraints, challenges, and opportunities.

The report provides insights on the following pointers:

Analysis of key drivers (Enhancements and benefits derived from seed technologies to encourage adoption of seed coating, Seed coating would support agricultural productivity on marginal lands, and Increase in seed replacement rate to drive adoption of commercialized seeds), restraints (Uncertainty in climate conditions to impact seed coating market and Low yield of crops in under-irrigated areas to impact seed coating market), opportunity (Development of biodegradable seed coatings to reduce environmental pollution), and challenges (Unorganized new entrants with low profit-to-cost ratio) influencing the growth of the seed coating market.

**Product Development/Innovation:** Detailed insights on upcoming technologies, research & development activities, and new product & service launches in the seed coating market.

**Market Development:** Comprehensive information about lucrative markets – the report analyses the seed coating market across varied regions.

**Market Diversification:** Exhaustive information about new products & services, untapped geographies, recent developments, and investments in the seed coating market.

**Competitive Assessment:** In-depth assessment of market shares, growth strategies, and service offerings of leading players like Solvay (Belgium), BASF SE (Germany), Corda International Plc (UK), DSM (Netherlands), Clariant (Switzerland), Sensient Colors LLC (US), Precision Laboratories, LLC (US), Milliken (US), and BrettYoung (Canada) among others in the seed coating market strategies. The report also helps stakeholders understand the seed coating market and provides them with information on key market drivers, restraints, challenges, and opportunities.

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TABLE 236 ASIA PACIFIC: SEED COATING MARKET, BY CROP TYPE, 2018–2022  
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11.4.3.1 High economic growth and favorable seed policies to drive market

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TABLE 272 KAZAKHSTAN: SEED COATING MARKET, BY CROP TYPE, 2018–2022 (USD MILLION)

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TABLE 287 REST OF THE WORLD: SEED COATING MARKET, BY CROP TYPE, 2023–2028 (USD MILLION)

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11.5.4.1 Rising emphasis on adopting innovative and precise farming techniques to drive market

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TABLE 311 AFRICA: SEED COATING MARKET, BY ADDITIVE, 2023–2028 (USD MILLION)

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\*Details on Business overview, Products/Solutions/Services offered, Recent developments, MnM view, Right to win, Strategic choices made, and Weaknesses and Competitive threats might not be captured in case of unlisted companies.

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## About

According to a new market research report “Seed Coating Materials Market by Type (Polymers, Colorants, Binders, and Other Additives), by Crop Type (Cereals & Grains, Oilseeds, Fruits & Vegetables) & by Geography - Global Trends & Forecasts to 2019”, categorizes the global market for seed coating materials on the basis of type, crop type and geography.

The Seed Coating Materials Market is projected to grow from \$924.50 Million in 2013 to \$1,426.78 Million by 2019, with a CAGR of 7.5% from 2014 to 2019.

The Seed Coating Materials Market is segmented by type, by crop type, and by geography. The market size of each region such as North America, Europe, Asia-Pacific, Latin America, and Rest of the World (ROW) is projected in the report. The key countries such as U.S., Germany, China, and Brazil are covered and their market size is forecasted along with their growth rates.

### **Polymer: Largest Market Segment**

Polymer is the single-largest segment, holding healthy share of the global Seed Coating Materials Market in 2013 and is projected to grow with a maximum CAGR value from 2014 to 2019. North America is the largest market of polymer and Europe stood second in 2013.

### **Seed Coating Materials Market, by Crop Type**

The Seed Coating Materials Market consists of four crop types; they are cereals & grains, oilseeds, fruits & vegetables, and other crops. The demand for coating materials for cereal and grain seeds accounted for the largest share in 2013. North America was the largest consumer of cereals & grains in 2013, followed by the Asia-Pacific region.

Leading companies such as:

Bayer CropScience (Germany)

BASF SE (Germany)

Clariant International (Switzerland)

are focusing on the expansion of their seed coating material business through acquisitions and agreements to increase their production and distributional network.

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