

Asia Pacific Seed Treatment - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2024 - 2029)

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Abstracts

The Asia Pacific Seed Treatment Market size is estimated at 1.58 billion USD in 2024, and is expected to reach 1.95 billion USD by 2029, growing at a CAGR of 4.28% during the forecast period (2024-2029).

Insecticides dominated the Asia-Pacific seed treatment market as seeds are more susceptible to soil-borne insects

Seed treatment is an important practice in Asia-Pacific to protect seeds and enhance crop performance. These treatments help control seed-borne diseases, pests, and nematodes, ensuring healthy seedlings and improved crop establishment.

The market value of seed treatment experienced a growth of 10.5% during the historical period. This upward trend can be attributed to the increasing recognition of the advantages offered by seed treatment for protecting and enhancing the growth of seedlings and their productivity.

China and India are the leading agricultural nations that hold a significant share of seed treatments in the Asia-Pacific market. China constituted approximately 28.7% of the regional market value, while India held around 21.3% market share in 2022.

Insecticide seed treatment dominated the market, accounting for 68.0% of the Asia-Pacific seed treatment market in 2022. Insects can severely damage seeds and seedlings, which can result in poor stand establishment, limited germination, and yield

losses. Insecticide seed treatments prevent the damage posed by these pests, resulting in seedlings that are healthier and more vigorous.

Fungicides applied to seeds form a protective barrier that aids in the prevention and control of diseases such as damping off, seedling blight, and root rot. Fungicide seed treatment held a significant share of 29.8% in the Asia-Pacific fungicide market in 2022.

The market is expected to grow during the forecast period (2023-2029), registering a CAGR of 4.2%. This growth is primarily anticipated to be driven by the rising demand for food production to meet the needs of a growing population. In order to optimize crop yields and minimize losses due to diseases and insects, farmers are increasingly adopting seed treatments.

The need to protect seeds and seedlings from early-growth pests and diseases may increase the seed treatment adoption rate

The seed treatment market in Asia-Pacific is experiencing significant growth, driven by farmers' increasing awareness of the need to protect seeds and seedlings from early crop diseases and insect pests. Farmers of the region's major crops, including rice, wheat, mangoes, grapes, bananas, and cotton, are adopting seed treatment applications.

In 2022, China emerged as the leading market within Asia-Pacific, accounting for a substantial share of 53.3% of the market. This dominance can be attributed to a combination of factors that fueled the country's impressive growth. These factors include the increasing imperative for ensuring food security and the escalating adoption of seed treatment products in crops such as rice and wheat.

The grains & cereals segment dominates the Asia-Pacific seed treatment market. In 2022, the segment accounted for 55.3% of the market's total value. This dominance can be because they are staple crops in the region, and a significant portion of agricultural land is dedicated to their cultivation. Due to their economic importance and high susceptibility to various pests and diseases, seed treatment plays a vital role in protecting grains and cereals during the early stages of growth.

Crop intensity has been rising in Asia-Pacific as a result of increased food demand. Farmers often practice repeated cropping or intensify the number of crop cycles per

year on the same land. This intensification leads to a higher risk of various seed-borne diseases and insect outbreaks, resulting in an increase in seed treatment usage. The Asia-Pacific seed treatment market is projected to witness significant growth during the forecast period (2023-2029) and register a CAGR of 4.2%.

Asia Pacific Seed Treatment Market Trends

The growing awareness to protect seeds and seedlings is driving the consumption of seed treatment pesticides

The average consumption of seed treatment chemicals in Asia-Pacific was 261.08 grams per hectare in 2022. Seed treatment has become increasingly popular in recent years due to its effectiveness and efficiency in protecting and enhancing crop productivity.

As agricultural practices in these countries are intensifying and the need for higher productivity is growing, Asia-Pacific farmers are becoming more aware of the importance of crop protection as an effective means of protecting crops from diseases, pests, and other stresses, thereby reducing the risk of yield loss.

Seed treatment can prevent and offer protection to crops against several fungal diseases, including seed rot, seedling blight, damping off, root rot, and foliar diseases like powdery mildew, downy mildew, and early blight. The use of active ingredients helps as they are based on target diseases and seed treatment requirements. Metalaxyl, carbendazim, and captan are the most used active ingredients in seed treatment products in the Asia-Pacific market.

Seed treatments are also being used against insect pests and nematodes. For instance, the root-knot nematode is the most dangerous among the nematode species that affect fruit and vegetable crops and is known to cause a yield loss of 34% in carrots, 26% in potatoes, 23% in tomatoes, 22% in bottle gourds, and 21% in brinjal, which can effectively be mitigated by seed treatment practices.

The seed treatment industry in Asia-Pacific countries is witnessing technological advancements that enable more precise and efficient seed treatment applications. These advancements include improved seed treatment formulations and advanced seed treatment equipment, leading to higher usage of seed treatment chemicals by farmers in the region.

Increasing promotional activities by various government agencies across Asia-Pacific drives the demand and price

Seed treatment plays an important role in protecting seeds and seedlings from seed and soil-borne diseases and insect pests affecting crop emergence and growth. Cypermethrin, abamectin, azoxystrobin, malathion, and metalaxyl are the most commonly used seed treatment chemicals in Asia-Pacific.

Cypermethrin is a non-systemic soil-acting pyrethroid insecticide. It is used in seed treatment for the reduction of wheat bulb fly and wireworm damage to autumn/winter sown wheat and barley. It was valued at a price of USD 21.0 thousand per metric ton in 2022.

Abamectin belongs to the ivermectin chemical class and has high intrinsic activity against nematodes. It is used to protect young plants from root-attacking nematodes in corn, soybean, and cotton production. It was priced at USD 8.7 thousand per metric ton in 2022.

Azoxystrobin is a broad-spectrum preventative seed treatment fungicide with systemic properties recommended for the control of Deuteromycetes, Oomycetes, Ascomycetes, and Basidiomycetes fungi that cause yield losses in crops. In 2022, azoxystrobin was priced at USD 4.5 thousand per metric ton.

Various regulations by government agencies are encouraging the use of seed treatments to increase the marketability of seeds. The Government of India has decided to launch a countrywide campaign for ensuring 100% seed treatment in all important crops during the kharif season. Pesticide industry associations, ATMAs, CIPMCs, KVKs, farmers clubs, SAUs, NGOs, etc., can play an important role in the campaign promoting 100% seed treatment. Such initiatives may further affect the price of seed treatment chemicals in the region over the coming years.

Asia Pacific Seed Treatment Industry Overview

The Asia Pacific Seed Treatment Market is moderately consolidated, with the top five companies occupying 55.17%. The major players in this market are BASF SE, Bayer

AG, Corteva Agriscience, Syngenta Group and UPL Limited (sorted alphabetically).

Additional Benefits:

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