

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

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Abstracts

The Europe Seed Treatment Market size is estimated at 1.45 billion USD in 2024, and is expected to reach 1.79 billion USD by 2029, growing at a CAGR of 4.29% during the forecast period (2024-2029).

Fungicides dominated the European seed treatment market as seeds are more susceptible to soil-borne fungi

Seed treatment refers to the application of fungicide, insecticide, or a combination of both to seeds to disinfect them and protect them from seed-borne or soil-borne pathogenic organisms. Seed treatment can improve germination, seedling emergence, plant vigor, stand establishment, and total yield, helping ensure the crop is on its way to reaching its full genetic potential.

The first four to six weeks after sowing is a critical period in the life of a new plant as seedlings emerge and develop their physical makeup. Sowing treated seeds helps protect the germination and establishment stages when emerging seedlings are most vulnerable to attack from invasive insect pests and disease pathogens.

Fungicides dominated the European seed treatment market with a share of 49.0% in 2022. The most common disease-causing fungi found in Europe are *Fusarium* spp., *Septoria* spp., *Pyrenophora* spp., *Ustilago* spp., *Tilletia* spp., and *Botrytis* spp. Similarly, *Rhizoctonia solani*, *Phytophthora* spp., *Pythium* spp., *Verticillium* spp., and *Sclerotinia* spp. are the most common soil-borne fungi.

The European seed treatment market is dominated by cereal and grain crops, accounting for 61.8% of the market share in 2022. Cereal crops are susceptible to various seed-borne diseases caused by fungi, bacteria, and viruses. Seed treatment helps protect the seeds from these pathogens, preventing infection during germination and early growth stages. Common seed-borne diseases in cereals include Fusarium, smuts, bunts, and seedling blights.

Schemes like the European Seed Treatment Assurance Scheme (ESTA), a quality assurance system to ensure that seed treatment and the resulting treated seeds meet requirements defined by legislators and the industry, are boosting the market's growth.

Schemes like the European Seed Treatment Assurance Scheme drive the seed treatment market

In Europe, annual crops can be subdivided into winter crops and spring and summer crops. Winter crops are sown in autumn and harvested in the summer of the following year. Spring and summer crops are sown and harvested in the same year. In the European Union, wheat, rapeseed, rye, and triticale are typically winter crops, whereas maize, sunflowers, rice, soybeans, potatoes, and sugar beet are summer crops. Barley is common in both its winter and spring varieties.

Grains and cereals dominated the consumption of seed treatment chemicals in Europe, accounting for about 61.8% of the market value, which was valued at about USD 955.1 million in 2022. It is anticipated to reach USD 1.73 billion by the end of the forecast period. The area under grains and cereals is showing an increasing trend, which was 119.2 million hectares in 2022 to 133.5 million hectares by 2029.

Among the European countries, Spain dominated the market with a market share of 19.4% of the European seed treatment market in 2022. The area under cultivation is anticipated to grow from 12.7 million hectares in 2022 to 14.0 million hectares by 2029. This will further drive the country's seed treatment market and it is anticipated to register a CAGR of 9.0% during the forecast period.

Moreover, a few schemes like the European Seed Treatment Assurance Scheme (ESTA), a quality assurance system to ensure that seed treatment and the resulting treated seed meet requirements defined by legislators and industry are boosting the

market's growth. The ESTA has been designed to be compatible with the national quality assurance systems in France (PQP) and Germany (SeedGuard). This will further drive the market and is anticipated to grow at a value CAGR of 4.2% during the forecast period.

Europe Seed Treatment Market Trends

Growing adoption of farm-to-fork strategy and other alternatives for controlling seed and soil-borne diseases is reducing the per hectare consumption of seed treatments

Agriculture is a major contributor to the European economy, but it faces several challenges, such as weed infestation, insect pests, and fungal diseases, which cause significant losses in crop production every year. To address these issues, the European agricultural industry employed an average of 619.3 grams of seed treatment chemicals per hectare of farmland in 2022. These seed treatment chemicals are specifically designed to protect crops from early crop growth pests and diseases, allowing farmers to increase their yields and meet the growing demand for food in the region.

Over the years, there has been a significant decrease in the usage of seed treatments per hectare in the region. In 2022, the consumption of seed treatments per hectare was reduced by a substantial 33.0 grams compared to 2017. This decline can be mainly attributed to the increasing adoption of the farm-to-fork strategy in European countries. The primary goal of this strategy is to reduce the use of fertilizers and pesticides by half and increase organic farming by 25%. The widespread adoption of this strategy has led to a significant impact on the application of seed treatments to control soil-borne and seed-borne diseases. Farmers are now actively seeking alternative methods to control these diseases.

Maize is a crucial field crop cultivated in several European countries such as France, Romania, Germany, Hungary, and Italy. These countries have more than a million hectares of farmland dedicated to maize cultivation. The introduction of genetically modified varieties of maize has led to a significant decrease in the use of seed treatment chemicals, resulting in a lower need for their application. As a result, seed treatment is becoming less common in European maize cultivation.

Cypermethrin, metalaxyl, azoxystrobin, abamectin, and emamectin benzoate-based pesticide seed treatments play an important role in protecting crops from pests and

diseases

Cypermethrin, metalaxyl, azoxystrobin, abamectin, and emamectin benzoate-based pesticides play an essential role in protecting crops from pests and diseases. Farmers are becoming more aware of the advantages of using seed treatment pesticides. These chemicals provide targeted protection, requiring lower quantities compared to foliar or soil-applied pesticides, which can lead to cost savings.

In 2022, cypermethrin was priced at USD 21.1 thousand per metric ton. This synthetic pyrethroid is used as an insecticide by farmers for seed treatment before planting, providing protection against insect, pest, and bird attacks. Cypermethrin serves as a highly effective insecticide seed treatment to mitigate bulb flies and wireworms.

Metalaxyl, a significant acyl-alanine fungicide, holds crucial importance. Effective against oomycetes such as Pythium, Phytophthora, and various downy mildews, it is commonly applied in crops like corn, peas, sorghum, and sunflower. In 2022, its price amounted to USD 4.5 thousand per metric ton.

Azoxystrobin, which was priced at USD 4.6 thousand per metric ton in 2022, is used as a seed treatment fungicide. It is effective against numerous seed-borne and soil-borne pathogens, which cause seed decay, seedling blight, and damping-off. Azoxystrobin mainly targets diseases such as Pythium, Fusarium, white mold, brown spot, and Phomopsis.

In 2022, abamectin was priced at USD 8.8 thousand per metric ton. By employing abamectin seed treatment, plants receive protection right from the start, mitigating the risk of early pest damage during critical early growth stages. This widely used pesticide plays a significant role in agriculture and horticulture by effectively controlling various pests, including insects and mites.

Europe Seed Treatment Industry Overview

The Europe Seed Treatment Market is moderately consolidated, with the top five companies occupying 56.69%. The major players in this market are Bayer AG, Corteva Agriscience, Mitsui & Co. Ltd (Certis Belchim), Syngenta Group and UPL Limited (sorted alphabetically).

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