

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

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Abstracts

The North America Seed Treatment Market size is estimated at 1.81 billion USD in 2024, and is expected to reach 2.29 billion USD by 2029, growing at a CAGR of 4.81% during the forecast period (2024-2029).

The market is fueled by increasing awareness of the benefits of seed-applied technologies in protecting and establishing healthy seedlings

The seed treatment industry in North America is experiencing significant growth. The market value increased by 9.8% in 2022 compared to 2020. This growth is driven by growing awareness of the benefits of seed-applied technologies in protecting and establishing healthy seedlings and the need to improve overall productivity.

The United States and Canada are leading agricultural nations that extensively use seed treatment chemicals to safeguard their crops against various fungal diseases and pests. These two countries hold a significant market share for seed treatments in the region. The United States constitutes approximately 83.4% of the regional market value, while Canada contributes around 3.7% of the market share.

The availability of seed treatment products with advanced protection against pests, disease, and uncertain soil conditions during the critical early growth period results in improved effectiveness, which drives consumption, thereby contributing to the growth of the market.

The seed treatment market is expected to witness a growth of 27.2% during the forecast period of 2023-2029. This growth is primarily 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 pests, farmers are increasingly adopting seed treatment, which plays a crucial role in improving seedling vigor and overall crop productivity.

Therefore, growing awareness about the benefits of seed treatment, the availability of innovative products, and the rising adoption rate of seed treatment are expected to fuel the growth of the market during the forecast period.

Farmers are increasingly recognizing the value of seed treatments in improving crop health, which is leading to the expansion of the market

The North American seed treatment market is expanding rapidly due to the rising consumption of seed treatment as farmers increasingly recognize the value of seed treatments in improving crop health and productivity.

The seed treatment market includes a wide range of crops. Among all, grains and cereals accounted for 44.1% of market share in 2022. The rising incidence of pests and diseases is negatively affecting these crops, which is driving the adoption of seed treatments in grains and cereals.

The United States is the largest seed treatment market in North America, accounting for a share of 83.4% in 2022. The country has been witnessing substantial growth driven by factors such as increasing demand for food security and rising adoption of seed treatment products.

The market value increased in the region by 30.8% between 2017 and 2022. Government initiatives aimed at promoting sustainable agriculture and increasing food production boosted the seed treatment market in the region, mainly in the United States and Canada. For instance, the National Institute of Food and Agriculture (NIFA), through its funding initiatives, played a crucial role in advancing sustainable agriculture. One such program is the Sustainable Agriculture Research and Education (SARE) program, which has significantly supported farmers, growers, and rural communities.

Another factor contributing to the growth of the seed treatment market is the growing

sustainable agricultural practices. Seed treatments offer targeted protection against pests and diseases, reducing the reliance on broad-spectrum pesticides and minimizing the environmental impact.

Therefore, the market is expected to register a CAGR of 4.8% during the forecast period (2023-2029).

North America Seed Treatment Market Trends

Increased crop losses in major crops due to soilborne diseases and nematodes necessitate the use of seed treatments with higher dosages

North America experienced a noteworthy upsurge in seed treatment consumption per hectare, with a recorded increase of 53 grams in 2022 compared to the figures from 2017. This substantial growth in consumption can be attributed to several factors that have influenced agricultural practices in the region. One significant factor is the impact of climate changes, which have resulted in shifts in weather patterns and the emergence of new challenges for farmers. As a consequence of these changes, there has been a greater need for effective seed treatment products to mitigate the adverse effects of unpredictable weather on crop health and yield.

Additionally, the rise in fungal and nematode infestations has posed significant threats to crops, necessitating the use of seed treatments at higher application rates to safeguard plant health and ensure optimal yields.

The increase in seed treatment consumption is a response to the changing agricultural landscape in North America. Farmers are proactively adopting seed treatment solutions as a precautionary measure. The United States and Canada, as major agricultural countries in the region, are currently grappling with significant challenges posed by plant parasitic nematodes, soil-borne diseases, and various other insect pests.

Soybeans, maize, cotton, and corn are the prominent crops grown in the region, but they encounter significant challenges from various nematodes and soilborne diseases. These challenges include root-lesion nematodes, root rots, fusarium species, cereal cyst nematodes, soybean cyst nematodes, rhizoctonia, pythium species, phomosis, seedling blights, and others. The increasing damage by these diseases and nematodes necessitates the seed treatment application method with higher dosages.

The growing demand for Seed treatment is anticipated to fuel the prices of the active ingredients.

In North America, commonly utilized active ingredients for seed treatment chemicals include cypermethrin, metalaxyl, malathion, abamectin, and azoxystrobin. Seed treatment offers initial protection to seeds and young plants from pests and diseases by establishing a defensive layer upon seed sowing. This protective barrier shields the seed from potential harm as it begins its growth in the soil.

Cypermethrin, as an insecticide, remained primarily on the surface of treated seeds or plants, forming a protective barrier for quick knockdown action against a wide range of insect pests. Its price stood at USD 21.0 thousand per metric ton in 2022. The mode of action of Cypermethrin involves disrupting the nervous systems of insects, leading to paralysis and, ultimately, their death.

Malathion's systemic effect allowed for the successful management of a wide range of insect pests, such as aphids, leafhoppers, thrips, scales, and specific caterpillar types. It was priced at USD 124 thousand per metric ton in 2022. Malathion inhibits acetylcholinesterase, a vital enzyme for nerve function in insects, leading to their incapacitation.

Abamectin belongs to the Ivermectin chemical class and has high intrinsic activity against nematodes. It is used to protect young plants from the root-attacking nematodes in corn, soybeans, and cotton production. It was priced at USD 8.8 thousand per metric ton in 2022.

By applying metalaxyl as a seed treatment, farmers can proactively address disease issues right from the start of the plant's life cycle. This early intervention helps ensure healthier and more vigorous seedling establishment, which can lead to improved crop yields. Metalaxyl was priced at USD 4.4 thousand per metric ton in 2022.

North America Seed Treatment Industry Overview

The North America Seed Treatment Market is fairly consolidated, with the top five companies occupying 73.84%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, Nufarm Ltd and Syngenta Group (sorted alphabetically).

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