

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

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Abstracts

The Seed Treatment Market size is estimated at 9.06 billion USD in 2024, and is expected to reach 11.27 billion USD by 2029, growing at a CAGR of 4.47% during the forecast period (2024-2029).

Growing awareness among farmers is driving the demand for seed treatments

During 2017-2022, the global chemical fungicide seed treatment market witnessed a substantial growth of 18.3%. Fungal diseases like rice blast cause up to 30% global rice yield loss and severe economic damage. The aim to reduce these losses increased the need for higher fungicidal seed treatments. Metalaxyl, carbendazim, thiram, and captan are the most used active ingredients in fungicidal seed treatment products.

Insecticidal seed treatments have high target specificity in controlling a range of pests that attack seeds or seedlings, such as aphids, thrips, wireworms, and beetles at the initial stage of the crop's life cycle. Moreover, insecticidal seed treatments are cost-effective alternatives as they require low application rates and can help reduce the reliance on foliar sprays in the later stages of the crop by providing proper preventive measures at the very initial stages. These factors are expected to drive the market at a CAGR of 4.4% during the forecast period (2023-2029).

Active ingredients such as imidacloprid, clothianidin, thiamethoxam, fipronil, and chlorpyrifos are highly important in chemical insecticide seed treatment. Imidacloprid, clothianidin, and thiamethoxam are effective against a wide range of sucking insects, such as aphids, whiteflies, and leafhoppers, while fipronil and chlorpyrifos act against

soil-dwelling insect pests.

There is an increasing incidence of nematode infestations globally with severe crop losses. The growing knowledge among farmers about the various alternatives to overcome yield losses led to a significant growth of 4.6% during the historical period.

Seed treatment improves the plant abiotic stress tolerance towards droughts and heatwaves.

The growing awareness among farmers regarding the need to protect seeds and seedlings from early crop diseases and insect pests in the preharvest stage raises the utilization of seed treatment products, which will give more strength to the crop to grow further with uniform establishment and growth. The global seed treatment market accounted for USD 8.36 billion, with a consumption volume of 719.0 thousand metric tons in 2022.

In 2022, South America dominated the market with 44.7% of the global seed treatment, with a market value of USD 3.74 billion. The dominance of the South American region is majorly attributed to the changing climatic conditions. Recent droughts and heat waves have hampered crop production. Seed treatment increases the plant's tolerance to adverse conditions like drought and heatwaves, resulting in higher utilization. In 2022, Brazil held the dominant position as the largest market in South America, representing 91.4% of the region's market share. The country's remarkable expansion can be attributed to several factors, including the growing need for food security and the escalating utilization of seed treatment products in crops like soybeans.

The North America seed treatment market is the second largest, with 19.9% and a market value of USD 1.66 billion in 2022. The United States is the largest seed treatment market, accounting for a share of 83.4% in 2022. The country has been witnessing substantial growth driven by increasing demand for food security and rising adoption of seed treatment products in major grown crops like soybeans, as seed treatment can reduce the seeding rate and increase profitability.

Global Seed Treatment Market Trends

Growing fungal infestations in early crop cycle and effectiveness of fungicide treatment in addressing these issues may lead to a rise in the demand for fungicide seed

treatments

The global average consumption of seed treatment chemicals was recorded at 3.4 kg per hectare of agricultural land in 2022. The usage of seed treatment chemicals is growing with the rising awareness among farmers globally about the significance of seed treatment in crop protection.

The usage of fungicidal seed treatments is more popular among all pesticides due to the significant threat posed by fungal diseases such as rice blasts, leading to substantial yield losses globally. These diseases can result in up to a 30% loss in rice production, equivalent to feeding 60 million people, causing severe economic damage. Treating seeds with tricyclazole 75 WP at 3g/kg effectively prevents and controls this seed-borne disease even in later stages.

Imidacloprid, clothianidin, thiamethoxam, fipronil, and chlorpyrifos are crucial active ingredients in chemical insecticides for seed treatment. They exhibit high efficacy against a broad spectrum of pests, including wireworms, seed-corn maggots, grubs, soil-dwelling insects, caterpillars, and beetles.

South America is the highest per-hectare consumer of seed treatment chemicals, with 1,959 grams per hectare of agricultural land in 2022, followed by Europe and North America, with consumption of 619.0 and 583.0 grams per hectare of seed treatment chemicals, respectively, in the same year.

Research indicates that the application of insecticides on rice seeds effectively reduced the larval population of rice water weevil. These treatments displayed control efficiency surpassing 90% and resulted in significant yield improvements of up to 25% in South America. Such factors are leading to higher adoption of seed treatments in the region and globally.

Metalaxyl, when used as seed treatment, offers early protection to seeds and seedlings from soil-borne pathogens

Seed treatments are specialized chemicals applied directly to seeds, offering enhanced protection from pests and diseases, promoting better germination rates, and ensuring healthier plant establishment, contributing to increased crop productivity and sustainable farming practices.

As a non-systemic insecticide, cypermethrin remains primarily on the surface of treated seeds or plants. It forms a protective barrier that acts in contact with the target pests. Cypermethrin is known for its quick knockdown effect on a wide range of insect pests, making it valuable in seed treatment applications. In 2022, it was priced at USD 21.1 thousand per metric ton.

Malathion's systemic action enables it to provide protection against pests that feed on different parts of the plant. It is effective in controlling a variety of insect pests, such as aphids, leafhoppers, thrips, scales, and certain caterpillar species that may infest the treated crops. Malathion was priced at USD 12.5 thousand per metric ton in 2022.

Metalaxyl, when used, offers early protection to seeds and seedlings from soil-borne pathogens, preventing diseases like damping-off and seed rot. It is effective against pathogens such as pythium, phytophthora, and certain downy mildew. In 2022, it was priced at USD 4.4 thousand per metric ton.

Azoxystrobin's systemic activity allows it to be absorbed by treated plants and translocated within their vascular system, providing extended protection to different parts of the plant, including new growth and foliage. It was priced at USD 4.5 thousand per metric ton in 2022.

Governments worldwide are promoting seed treatment practices through extension services, subsidies, awareness campaigns, and collaborations within the industry to encourage the adoption of seed treatments.

Seed Treatment Industry Overview

The Seed Treatment Market is moderately consolidated, with the top five companies occupying 57.38%. The major players in this market are BASF SE, Bayer AG, Corteva Agriscience, FMC Corporation and Syngenta Group (sorted alphabetically).

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