

# **Biological Seed Enhancement Market Forecasts to 2032 – Global Analysis By Microbial Type (Bacteria and Fungi), Crop Type, Function, Formulation, Application, End User and By Geography**

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## **Abstracts**

According to Statistics MRC, the Global Biological Seed Enhancement Market is accounted for \$1.37 billion in 2025 and is expected to reach \$3.56 billion by 2032 growing at a CAGR of 14.6% during the forecast period. Biological Seed Enhancement refers to the application of beneficial microorganisms, such as bacteria, fungi, or actinomycetes, to seeds before planting to enhance germination, growth, and crop yield. These microorganisms colonize the rhizosphere or root surfaces, promoting nutrient uptake, improving soil health, and protecting plants from pathogens through natural mechanisms like competition, antibiosis, or induced systemic resistance. Biological Seed Enhancements are eco-friendly alternatives to chemical pesticides and fertilizers, reducing environmental impact while enhancing plant resilience to stress. This sustainable agricultural practice supports healthier crop development and improved productivity across diverse soil and climatic conditions.

### **Market Dynamics:**

Driver:

Rising demand for sustainable

Farmers are seeking biological inputs that reduce chemical dependency improve soil health and enhance crop resilience. Platforms support nitrogen fixation disease suppression and root development using beneficial bacteria fungi and microbial consortia. Integration with regenerative practices ESG goals and organic certification

enhances adoption and stakeholder alignment. Demand for residue-free climate-smart and productivity-enhancing solutions is rising across commercial farms cooperatives and agtech startups. These dynamics are propelling platform deployment across sustainability-focused seed treatment ecosystems.

#### Restraint:

##### Regulatory complexity and slow registration

Approval timelines vary across regions and often require extensive field validation toxicology and environmental impact data. Enterprises face challenges in navigating fragmented compliance frameworks and evolving biostimulant definitions. Lack of harmonized standards and microbial classification further complicates labeling marketing and export. Vendors must invest in regulatory intelligence multi-country dossiers and stakeholder engagement to accelerate approval. These constraints continue to hinder platform maturity across innovation-driven and regulation-sensitive agricultural markets.

#### Opportunity:

##### Proven agronomic benefits

Platforms deliver targeted microbes at the seed level to improve early vigor root architecture and crop establishment. Integration with precision planting seed coating and digital agronomy enhances performance and traceability. Demand for scalable cost-effective and field-validated solutions is rising across cereals pulses and horticulture crops. Enterprises are aligning microbial strategies with climate adaptation carbon farming and input optimization goals. These trends are fostering growth across agronomically proven and biologically active seed treatment platforms.

#### Threat:

##### Price sensitivity and supply

Biological inputs often face cost barriers compared to conventional treatments especially in low-margin and subsistence farming systems. Supply chain disruptions formulation variability and cold chain requirements degrade reliability and scalability. Enterprises face challenges in maintaining microbial viability shelf life and field efficacy under diverse conditions. Vendors must offer stable formulations localized production

and bundled services to improve value and trust. These limitations continue to restrict platform performance across cost-sensitive and infrastructure-limited agricultural zones.

### **Covid-19 Impact:**

The pandemic disrupted field trials supply chains and extension services across Biological Seed Enhancement development and deployment. Lockdowns delayed planting validation and farmer outreach while increasing interest in sustainable and low-input agriculture. Platforms adapted by offering remote agronomy digital training and bundled biological packages across affected regions. Investment in microbial R&D formulation stability and decentralized manufacturing surged across public and private sectors. Public awareness of soil health food safety and biological inputs increased across policy and consumer circles. These shifts are reinforcing long-term investment in resilient and biologically enabled seed treatment infrastructure.

The cereals & grains segment is expected to be the largest during the forecast period

The cereals & grains segment is expected to account for the largest market share during the forecast period due to their global acreage input intensity and responsiveness to microbial enhancement. Platforms support early root development nutrient solubilization and disease suppression across wheat maize rice and barley. Integration with seed coating precision planting and crop modeling enhances performance and ROI tracking. Demand for scalable field-proven and compliance-ready solutions is rising across commercial growers and cooperatives. Vendors offer crop-specific formulations multi-strain blends and agronomic support to drive adoption.

The encapsulated granules segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the encapsulated granules segment is predicted to witness the highest growth rate as platforms expand across stability delivery and multi-season performance. Granular formulations protect microbes from environmental stress and support controlled release during germination and early growth. Platforms support compatibility with mechanical planting cold chain independence and extended shelf life. Integration with seed drills crop models and digital monitoring enhances scalability and precision. Demand for durable easy-to-apply and multi-crop solutions is rising across large farms and input distributors. These dynamics are accelerating growth across encapsulated Biological Seed Enhancement platforms and services.

### **Region with largest share:**

During the forecast period, the Asia Pacific region is expected to hold the largest market share due to its agricultural intensity crop diversity and policy support across biological inputs. Countries like India China Indonesia and Vietnam scale microbial platforms across rice pulses and horticulture segments. Government-backed programs support biostimulant adoption farmer education and sustainable input subsidies. Local providers offer cost-effective regionally adapted and mobile-first solutions tailored to smallholder and cooperative needs. Demand for scalable inclusive and climate-resilient seed treatment infrastructure is rising across urban and rural agricultural zones. These factors are propelling Asia Pacific's leadership in Biological Seed Enhancement commercialization and deployment.

### **Region with highest CAGR:**

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR as regenerative agriculture ESG mandates and biological innovation converge across regional ecosystems. Enterprises deploy microbial platforms across corn soybean and specialty crops to improve soil health input efficiency and sustainability metrics. Investment in microbial R&D digital agronomy and carbon-linked farming supports scalability and stakeholder engagement. Presence of leading vendor's academic institutions and policy frameworks drives ecosystem depth and adoption. Firms align microbial strategies with USDA mandates carbon markets and retailer sustainability goals.

### **Key players in the market**

Some of the key players in Biological Seed Enhancement Market include BASF SE, Bayer AG, Syngenta AG, Corteva Inc., Novozymes A/S, Marrone Bio Innovations Inc., Certis Biologicals Inc., Valent BioSciences LLC, AgBiome Inc., Precision Laboratories LLC, Verdesian Life Sciences LLC, BioWorks Inc., Pivot Bio Inc., Chr. Hansen Holding A/S and Koppert Biological Systems B.V.

### **Key Developments:**

In May 2025, BASF signed an agreement to acquire the remaining 49% stake in Alsachimie, a joint venture with Domo Chemicals. The deal, finalized in June 2025, gave BASF full control over polyamide intermediates production at the Chalampe site in France, indirectly supporting its seed treatment formulation capabilities through

enhanced polymer access.

In March 2025, Bayer launched BioRise® 2 ST, a next-generation Biological Seed Enhancement for corn, combining beneficial fungi with chemical actives. The product improved nutrient uptake and root vigor, offering enhanced yield potential under variable field conditions. It marked Bayer's continued investment in biologicals integrated with conventional seed protection.

#### Microbial Types Covered:

Bacteria

Fungi

#### Crop Types Covered:

Cereals & Grains

Fruits & Vegetables

Fiber Crops (Cotton, Jute)

Plantation Crops (Tea, Coffee, Cocoa)

Other Crop Types

#### Functions Covered:

Biofertilizers

Biopesticides

Biostimulants

Growth Promoters

Other Functions

**Formulations Covered:**

Liquid Suspension

Dry Powder

Encapsulated Granules

Water-Dispersible Granules

Other Formulations

**Applications Covered:**

Seed Treatment

Soil Treatment

Foliar Spray

Post-Harvest Protection

Other Applications

**End Users Covered:**

Farmers

Agricultural Cooperatives

Commercial Farms

Agri-Biotech Companies

Other End Users

## Regions Covered:

### North America

US

Canada

Mexico

### Europe

Germany

UK

Italy

France

Spain

Rest of Europe

### Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

**What our report offers:**

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

**Free Customization Offerings:**

*Biological Seed Enhancement Market Forecasts to 2032 – Global Analysis By Microbial Type (Bacteria and Fungi),...*

All the customers of this report will be entitled to receive one of the following free customization options:

#### Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

#### Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

#### Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

## Contents

### **1 EXECUTIVE SUMMARY**

### **2 PREFACE**

- 2.1 Abstract
- 2.2 Stake Holders
- 2.3 Research Scope
- 2.4 Research Methodology
  - 2.4.1 Data Mining
  - 2.4.2 Data Analysis
  - 2.4.3 Data Validation
  - 2.4.4 Research Approach
- 2.5 Research Sources
  - 2.5.1 Primary Research Sources
  - 2.5.2 Secondary Research Sources
  - 2.5.3 Assumptions

### **3 MARKET TREND ANALYSIS**

- 3.1 Introduction
- 3.2 Drivers
- 3.3 Restraints
- 3.4 Opportunities
- 3.5 Threats
- 3.6 Application Analysis
- 3.7 End User Analysis
- 3.8 Emerging Markets
- 3.9 Impact of Covid-19

### **4 PORTERS FIVE FORCE ANALYSIS**

- 4.1 Bargaining power of suppliers
- 4.2 Bargaining power of buyers
- 4.3 Threat of substitutes
- 4.4 Threat of new entrants
- 4.5 Competitive rivalry

## **5 GLOBAL BIOLOGICAL SEED ENHANCEMENT MARKET, BY MICROBIAL TYPE**

- 5.1 Introduction
- 5.2 Bacteria
  - 5.2.1 Bacillus spp.
  - 5.2.2 Pseudomonas spp.
  - 5.2.3 Rhizobium spp.
  - 5.2.4 Azospirillum spp.
- 5.3 Fungi
  - 5.3.1 Trichoderma spp.
  - 5.3.2 Mycorrhizae
  - 5.3.3 Yeasts
  - 5.3.4 Actinomycetes

## **6 GLOBAL BIOLOGICAL SEED ENHANCEMENT MARKET, BY CROP TYPE**

- 6.1 Introduction
- 6.2 Cereals & Grains
- 6.3 Fruits & Vegetables
- 6.4 Fiber Crops (Cotton, Jute)
- 6.5 Plantation Crops (Tea, Coffee, Cocoa)
- 6.6 Other Crop Types

## **7 GLOBAL BIOLOGICAL SEED ENHANCEMENT MARKET, BY FUNCTION**

- 7.1 Introduction
- 7.2 Biofertilizers
- 7.3 Biopesticides
- 7.4 Biostimulants
- 7.5 Growth Promoters
- 7.6 Other Functions

## **8 GLOBAL BIOLOGICAL SEED ENHANCEMENT MARKET, BY FORMULATION**

- 8.1 Introduction
- 8.2 Liquid Suspension
- 8.3 Dry Powder
- 8.4 Encapsulated Granules
- 8.5 Water-Dispersible Granules

## 8.6 Other Formulations

# **9 GLOBAL BIOLOGICAL SEED ENHANCEMENT MARKET, BY APPLICATION**

## 9.1 Introduction

## 9.2 Seed Treatment

## 9.3 Soil Treatment

## 9.4 Foliar Spray

## 9.5 Post-Harvest Protection

## 9.6 Other Applications

# **10 GLOBAL BIOLOGICAL SEED ENHANCEMENT MARKET, BY END USER**

## 10.1 Introduction

## 10.2 Farmers

## 10.3 Agricultural Cooperatives

## 10.4 Commercial Farms

## 10.5 Agri-Biotech Companies

## 10.6 Other End Users

# **11 GLOBAL BIOLOGICAL SEED ENHANCEMENT MARKET, BY GEOGRAPHY**

## 11.1 Introduction

## 11.2 North America

### 11.2.1 US

### 11.2.2 Canada

### 11.2.3 Mexico

## 11.3 Europe

### 11.3.1 Germany

### 11.3.2 UK

### 11.3.3 Italy

### 11.3.4 France

### 11.3.5 Spain

### 11.3.6 Rest of Europe

## 11.4 Asia Pacific

### 11.4.1 Japan

### 11.4.2 China

### 11.4.3 India

### 11.4.4 Australia

- 11.4.5 New Zealand
- 11.4.6 South Korea
- 11.4.7 Rest of Asia Pacific
- 11.5 South America
  - 11.5.1 Argentina
  - 11.5.2 Brazil
  - 11.5.3 Chile
  - 11.5.4 Rest of South America
- 11.6 Middle East & Africa
  - 11.6.1 Saudi Arabia
  - 11.6.2 UAE
  - 11.6.3 Qatar
  - 11.6.4 South Africa
  - 11.6.5 Rest of Middle East & Africa

## **12 KEY DEVELOPMENTS**

- 12.1 Agreements, Partnerships, Collaborations and Joint Ventures
- 12.2 Acquisitions & Mergers
- 12.3 New Product Launch
- 12.4 Expansions
- 12.5 Other Key Strategies

## **13 COMPANY PROFILING**

- 13.1 BASF SE
- 13.2 Bayer AG
- 13.3 Syngenta AG
- 13.4 Corteva Inc.
- 13.5 Novozymes A/S
- 13.6 Marrone Bio Innovations Inc.
- 13.7 Certis Biologicals Inc.
- 13.8 Valent BioSciences LLC
- 13.9 AgBiome Inc.
- 13.10 Precision Laboratories LLC
- 13.11 Verdesian Life Sciences LLC
- 13.12 BioWorks Inc.
- 13.13 Pivot Bio Inc.
- 13.14 Chr. Hansen Holding A/S

## 13.15 Koppert Biological Systems B.V.

## List Of Tables

### LIST OF TABLES

Table 1 Global Biological Seed Enhancement Market Outlook, By Region (2024-2032) (\$MN)

Table 2 Global Biological Seed Enhancement Market Outlook, By Microbial Type (2024-2032) (\$MN)

Table 3 Global Biological Seed Enhancement Market Outlook, By Bacteria (2024-2032) (\$MN)

Table 4 Global Biological Seed Enhancement Market Outlook, By Bacillus spp. (2024-2032) (\$MN)

Table 5 Global Biological Seed Enhancement Market Outlook, By Pseudomonas spp. (2024-2032) (\$MN)

Table 6 Global Biological Seed Enhancement Market Outlook, By Rhizobium spp. (2024-2032) (\$MN)

Table 7 Global Biological Seed Enhancement Market Outlook, By Azospirillum spp. (2024-2032) (\$MN)

Table 8 Global Biological Seed Enhancement Market Outlook, By Fungi (2024-2032) (\$MN)

Table 9 Global Biological Seed Enhancement Market Outlook, By Trichoderma spp. (2024-2032) (\$MN)

Table 10 Global Biological Seed Enhancement Market Outlook, By Mycorrhizae (2024-2032) (\$MN)

Table 11 Global Biological Seed Enhancement Market Outlook, By Yeasts (2024-2032) (\$MN)

Table 12 Global Biological Seed Enhancement Market Outlook, By Actinomycetes (2024-2032) (\$MN)

Table 13 Global Biological Seed Enhancement Market Outlook, By Crop Type (2024-2032) (\$MN)

Table 14 Global Biological Seed Enhancement Market Outlook, By Cereals & Grains (2024-2032) (\$MN)

Table 15 Global Biological Seed Enhancement Market Outlook, By Fruits & Vegetables (2024-2032) (\$MN)

Table 16 Global Biological Seed Enhancement Market Outlook, By Fiber Crops (Cotton, Jute) (2024-2032) (\$MN)

Table 17 Global Biological Seed Enhancement Market Outlook, By Plantation Crops (Tea, Coffee, Cocoa) (2024-2032) (\$MN)

Table 18 Global Biological Seed Enhancement Market Outlook, By Other Crop Types

(2024-2032) (\$MN)

Table 19 Global Biological Seed Enhancement Market Outlook, By Function

(2024-2032) (\$MN)

Table 20 Global Biological Seed Enhancement Market Outlook, By Biofertilizers

(2024-2032) (\$MN)

Table 21 Global Biological Seed Enhancement Market Outlook, By Biopesticides

(2024-2032) (\$MN)

Table 22 Global Biological Seed Enhancement Market Outlook, By Biostimulants

(2024-2032) (\$MN)

Table 23 Global Biological Seed Enhancement Market Outlook, By Growth Promoters

(2024-2032) (\$MN)

Table 24 Global Biological Seed Enhancement Market Outlook, By Other Functions

(2024-2032) (\$MN)

Table 25 Global Biological Seed Enhancement Market Outlook, By Formulation

(2024-2032) (\$MN)

Table 26 Global Biological Seed Enhancement Market Outlook, By Liquid Suspension

(2024-2032) (\$MN)

Table 27 Global Biological Seed Enhancement Market Outlook, By Dry Powder

(2024-2032) (\$MN)

Table 28 Global Biological Seed Enhancement Market Outlook, By Encapsulated Granules (2024-2032) (\$MN)

Table 29 Global Biological Seed Enhancement Market Outlook, By Water-Dispersible Granules (2024-2032) (\$MN)

Table 30 Global Biological Seed Enhancement Market Outlook, By Other Formulations (2024-2032) (\$MN)

Table 31 Global Biological Seed Enhancement Market Outlook, By Application (2024-2032) (\$MN)

Table 32 Global Biological Seed Enhancement Market Outlook, By Seed Treatment (2024-2032) (\$MN)

Table 33 Global Biological Seed Enhancement Market Outlook, By Soil Treatment (2024-2032) (\$MN)

Table 34 Global Biological Seed Enhancement Market Outlook, By Foliar Spray (2024-2032) (\$MN)

Table 35 Global Biological Seed Enhancement Market Outlook, By Post-Harvest Protection (2024-2032) (\$MN)

Table 36 Global Biological Seed Enhancement Market Outlook, By Other Applications (2024-2032) (\$MN)

Table 37 Global Biological Seed Enhancement Market Outlook, By End User (2024-2032) (\$MN)

Table 38 Global Biological Seed Enhancement Market Outlook, By Farmers  
(2024-2032) (\$MN)

Table 39 Global Biological Seed Enhancement Market Outlook, By Agricultural  
Cooperatives (2024-2032) (\$MN)

Table 40 Global Biological Seed Enhancement Market Outlook, By Commercial Farms  
(2024-2032) (\$MN)

Table 41 Global Biological Seed Enhancement Market Outlook, By Agri-Biotech  
Companies (2024-2032) (\$MN)

Table 42 Global Biological Seed Enhancement Market Outlook, By Other End Users  
(2024-2032) (\$MN)

Note: Tables for North America, Europe, APAC, South America, and Middle East &  
Africa Regions are also represented in the same manner as above.

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