

# **Seed Coating Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2019-2029**

## **Segmented By Additive (Polymers, Colorants, Pellets, Minerals/Pumice, Others), By Process (Film Coating, Encrusting, Pelleting), By Active Ingredient (Phytoactive Promoters, Protectants, Adjuvants, Inoculants), By Crop Type (Cereals & Grains, Pulses & Oilseeds, Fruits & Vegetables, Flowers & Ornamentals, Others), By Region and Competition**

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### **Abstracts**

Global Seed Coating Market was valued at USD 2.04 Billion in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 7.51% through 2029. Seed coating, also known as seed treatment or seed dressing, is a process in which seeds are chemically coated with fertilizers, repulsive agents, and crop protection chemicals to enhance their speed and performance. This process not only improves the efficiency of seed germination but also protects the seeds from pathogens, ensuring healthier plant growth.

Moreover, seed coating technology enables rapid multiplication and the timely supply of crops at more affordable prices. With its high yield per hectare, low seeding rate, and multi-component product, seed coating materials have gained popularity worldwide. The benefits of seed coating extend beyond functionality, as it also enhances the aesthetic appeal and contributes to a more sustainable and eco-friendly approach in agriculture. Overall, seed coating plays a crucial role in ensuring the accelerated growth and timely availability of crops, while also offering various advantages to both farmers and the environment.

## Key Market Drivers

### Technological Advancements in Seed Coating Materials

Technological advancements in seed coating materials are projected to significantly bolster global demand. The inception of advanced technologies has led to the development of superior seed coating materials that improve seed performance, leading to higher yields and more efficient use of arable land. For instance, innovations such as microencapsulation technology allow for the controlled release of protective agents, ensuring seeds are safeguarded against pathogens throughout their crucial growth stages. Furthermore, nanotechnology has been introduced to the seed coating industry, providing the capacity to incorporate minute quantities of fertilizers or pesticides directly onto the seed surface, thereby reducing the environmental footprint of agriculture. Enhanced seed germination, plant growth, and crop yield resulting from these advancements are expected to fuel the global demand for seed coating materials. Additionally, the integration of bioinformatics and genomics in seed coating technology is paving the way for the development of customized seed coating solutions, tailoring the materials to specific crop and soil requirements and driving market growth. In essence, as technology continues to evolve and permeate the seed coating industry, it is anticipated to be the primary driver for the increased global demand for seed coating materials.

### Increased Demand for High-Quality & Disease-Free Seeds

Seed coating, a technology that involves the application of materials onto the surface of seeds, is predicted to witness a remarkable surge in demand globally, primarily driven by the escalating demand for high-quality and disease-free seeds. This shift is underpinned by the increasing realization among farmers of the substantial yield benefit, enhanced nutritional value, and improved resistance to pests and diseases offered by coated seeds. With the world's population projected to reach nearly 9.7 billion by 2050, the pressure on the agricultural sector to boost productivity is mounting. High-quality and disease-free seeds have thus become imperative to ensure food security on a global scale. Furthermore, seed coating technology mitigates the environmental impact of agriculture by reducing the necessity for broad-spectrum agrochemicals, aligning with the growing emphasis on sustainable farming practices worldwide. The technology also fosters the efficient utilization of resources, including water and soil nutrients. Given these compelling advantages, the demand for seed coating is poised to rise substantially in the foreseeable future, contributing significantly to global food production.

and agricultural sustainability.

### Expansion of the Organic Food Industry

The organic food industry is experiencing remarkable growth worldwide due to a notable shift in consumer preferences towards healthier and more sustainable products. This expansion is not only driven by the increasing demand for organic food but also by the recognition of its positive impact on human health and the environment. As a result, organic farming practices are being adopted on a larger scale, necessitating the use of advanced agricultural methods and technologies. One of the crucial techniques employed in organic farming is seed coating, a process that involves enveloping seeds in protective materials. This coating enhances the seeds' resistance to diseases, pests, and adverse environmental conditions, ultimately improving crop yields. By stimulating germination and ensuring the optimal development of plants, seed coating plays a vital role in the success of organic farming operations.

What makes seed coating particularly appealing to organic farmers is its compatibility with the principles of sustainable agriculture. Instead of relying on chemical treatments, seed coating utilizes organic materials such as microbial inoculants and bio-stimulants. These natural substances not only protect the seeds but also promote a healthy and balanced ecosystem within the soil. This environmentally friendly approach aligns perfectly with organic standards and contributes to the overall sustainability of the agricultural system. As the organic food industry continues to expand, the demand for seed coating is expected to rise significantly. This growth will not only benefit organic farmers but also stimulate advancements in the seed coating sector. Manufacturers and researchers will continue to innovate and develop new coating materials and techniques that further optimize the performance and effectiveness of seed coating in organic farming.

### Increasing R&D Investments in The Seed Industry

Increasing R&D investment in the seed industry is a crucial factor expected to fuel the global demand for seed coating. With a growing global population and the consequent increase in food demand, there is an exigent need to enhance agricultural productivity. Seed coating, which involves the application of biological additives or protectants to seeds, significantly improves seed performance, leading to higher crop yields. Research and development play a pivotal role in discovering innovative coating materials and techniques that augment seed health and germination rates and enhance resistance against pests and diseases. As the seed industry continues to invest in R&D, novel

seed coating technologies are anticipated to emerge, offering growers an expanded arsenal of tools to increase crop production. Additionally, R&D investments help in the development of customized seed coating solutions tailored to specific crop types and regional climates, further fuelling demand in various parts of the world. Ultimately, the continuous influx of R&D investment in the seed industry stands as a powerful driver for the global demand for seed coating.

## Key Market Challenges

### High Costs of Advanced Coating Technologies

The high costs associated with advanced seed coating technologies are anticipated to pose a significant challenge to the global seed coating demand. These technologically advanced coatings often integrate crucial elements such as micronutrients, biostimulants, and pest deterrents to enhance seed performance. However, the capital-intensive nature of these technologies can inflate production expenses, which are in turn passed on to the consumers causing a surge in prices. In several low and middle-income economies, where agriculture forms a substantial portion of the GDP, such high costs can deter farmers from adopting these advanced seed coating technologies. These farmers, who are often operating on tight margins, find it challenging to justify the additional expenditure, especially given the unpredictability of agricultural yields and market prices. Furthermore, in regions with less access to credit facilities, the high upfront investment required for advanced seed coatings can be prohibitive. The steep costs, thus, reduce the affordability and accessibility of these advanced seed coating solutions, potentially leading to a decline in global demand. Consequently, while advanced seed coatings promise improved crop yields and resilience, their high costs may limit their widespread adoption, thereby suppressing global demand.

### Regulatory Constraints

Regulatory constraints are anticipated to impact the global demand for seed coating significantly. Governments worldwide are imposing stringent regulations on agrochemical use to protect the environment and human health. These policies limit harmful chemical ingredients in seed coating materials, resulting in a reduced demand. For instance, the European Union's Regulation EC No 1107/2009 restricts the usage of certain active substances in seed treatments, directly affecting the seed coating industry. Likewise, in the U.S., the Environmental Protection Agency (EPA) closely monitors the seed treatment industry, posing challenges to seed coating manufacturers. Furthermore, a growing preference for organically grown food is leading to a decrease

in demand for chemically treated seeds, further exacerbating the situation. This trend towards organic farming is reinforced by regulations promoting sustainable agriculture. Consequently, seed coating companies are now compelled to invest in research and development to formulate eco-friendly and compliant products, increasing operational costs and creating supply chain challenges. Therefore, while seed coating plays a crucial role in improving seed performance, the tightening regulatory landscape is expected to suppress its global demand.

## Key Market Trends

### Adoption of Precision Farming Techniques

The global demand for seed coating is predicted to surge significantly in the coming years, driven by the increasing adoption of precision farming techniques. Precision farming, which leverages advanced technology and data analytics, has revolutionized the agricultural industry by optimizing crop yield and resource efficiency. As a key driver for innovative agricultural practices, precision farming has paved the way for the widespread use of seed coating. Seed coating, a process that involves applying protective and nutritional substances to seeds before planting, offers a multitude of benefits for crop production. By enhancing seed performance, seed coating improves germination rates, provides disease resistance, and enables precise seed placement. These factors are all crucial components of precision farming, as they contribute to maximizing crop yields and minimizing resource wastage.

Moreover, the growth of precision farming is not limited to developed nations alone. Emerging economies are increasingly recognizing the potential of this approach in addressing food security challenges. As a result, these countries are expected to contribute significantly to the global demand for seed coating, further fueling its market expansion. As precision farming methods continue to gain traction worldwide, the market for seed coating is poised for substantial growth. Its role in optimizing crop production and resource efficiency makes seed coating an indispensable tool in modern agriculture, driving innovation and sustainability in the field.

### High Demand for Genetically Modified (GM) Crops

The increasing demand for Genetically Modified (GM) crops is projected to significantly boost the global seed coating industry. GM crops, bred for their high-yield and disease-resistant properties, are becoming increasingly essential in meeting the food demands of burgeoning global populations. However, these crops require meticulous care, and

this is where seed coating plays a pivotal role. Seed coating, essentially the process of applying protective and nutrient-rich coatings to seeds before planting, ensures that seeds germinate optimally, thereby increasing crop yield. Moreover, coated seeds are more resilient to adverse environmental conditions, pests, and diseases, further enhancing their productivity. Consequently, as the demand for GM crops escalates, so does the necessity for seed coating, driving its global market forward. Additionally, the escalating need for food security and sustainability worldwide is also likely to intensify the demand for seed coated GM crops. These trends underline the potential of the seed coating industry to grow in tandem with the global surge in GM crop cultivation. This symbiotic relationship between GM crops and seed coatings is expected to significantly influence the agricultural sector's future landscape.

## Segmental Insights

### Additive Insights

Based on the Additive, in the Global Seed Coating Market, polymers play a dominant role due to their exceptional properties and benefits. These versatile compounds, with their unique molecular structure, enhance the adhesion of both active and inactive ingredients to seeds, ensuring a strong and uniform coating that promotes optimal germination and early growth. By forming a protective barrier around the seeds, polymers effectively shield them from harsh environmental conditions such as extreme temperatures, moisture fluctuations, and pest attacks. Moreover, the controlled release properties of polymer-based coatings enable a gradual and sustained delivery of essential nutrients and bioactive substances to the developing seedlings, fostering healthy growth and increased crop yields. With their ability to minimize dust off during the seed coating process, polymers also contribute to a cleaner and safer working environment for agricultural workers. These advancements in seed coating technology, driven by the use of polymers, have revolutionized the industry by ensuring higher seed quality, improved crop performance, and sustainable agriculture practices.

### Process Insights

Based on the Process, the global seed coating market is primarily dominated by the film coating technique, a widely preferred method due to its exceptional efficiency, consistency, and cost-effectiveness. This technique enables the uniform application of protective substances and essential nutrients directly onto the seed surface, promoting optimal growth and development. By forming a thin and protective layer around the seed, film coating provides enhanced resistance against environmental stressors and



pathogens, ensuring higher germination rates and healthier seedlings. Moreover, the controlled release properties of film-coated seeds allow for the gradual release of nutrients, providing sustained nourishment throughout the early growth stages. Furthermore, the visually appealing appearance of film-coated seeds, with their vibrant colors and smooth texture, not only captivates the attention of growers but also attracts consumers, contributing to their overall market demand. With its numerous benefits and proven track record, film coating continues to solidify its leading position in the seed coating industry, driving innovation and meeting the evolving needs of farmers worldwide.

## Regional Insights

The North America region holds a dominant position in the Global Seed Coating Market. This is primarily attributed to the advanced agriculture technologies and high adoption rate of coated seeds among farmers in countries like the United States and Canada. The region's robust infrastructure for agricultural research and development further fuels this dominance. Additionally, the favorable climate conditions and availability of skilled workforce contribute to the region's success in seed coating. Furthermore, the presence of major seed coating companies and collaborations with research institutions in North America create a conducive environment for innovation and continuous improvement in seed coating techniques. As a result, the North America region continues to lead the way in the global seed coating industry, setting new standards for quality and efficiency.

## Key Market Players

BASF SE

Bayer AG

Clariant AG

Bayer Crop Science

Chemtura Corporation

Croda International Plc

Incotec Group

Sensient Technologies

Brett Young Seeds Ltd

Precision Laboratories, LLC

### Report Scope:

In this report, the Global Seed Coating Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Seed Coating Market, By Additive:

Polymers

Colorants

Pellets

Minerals/Pumice

Others

#### Seed Coating Market, By Process:

Film Coating

Encrusting

Pelleting

#### Seed Coating Market, By Active Ingredient:

Phytoactive Promoters



Protectants

Adjuvants

Inoculants

Seed Coating Market, By Crop Type:

Cereals & Grains

Pulses & Oilseeds

Fruits & Vegetables

Flowers & Ornamentals

Others

Seed Coating Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

**Company Profiles:** Detailed analysis of the major companies present in the Global Seed Coating Market.

## Available Customizations:

Global Seed Coating market report with the given market data, Tech Sci Research offers customizations according to a company's specific needs. The following

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customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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