

Seed Treatment Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> ****Industry:**** Seeds, Seed Treatment & Produce (Agriculture & Agribusiness)
> ****Source:**** https://www.mordorintelligence.com/industry-reports/seed-treatment-market(https://www.mordorintelligence.com/industry-reports/seed-treatment-market)
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Executive Market Summary

Market Metric	Details
Base Market Size	USD 9.90 billion
Projected Forecast (2031)	USD 9.90 billion
Growth Rate (CAGR)	4.23 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

- ! [Major players in Seed Treatment industry](images/chart_2.png)
- ! [Seed Treatment Market Size](images/chart_3.png)
- ! [Seed Treatment Market Share by Function, 2025](images/chart_4.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market OverviewStudy Period | 2018 - 2031 |
Market Size (2026) | USD 9.90 Billion |
Market Size (2031) | USD 12.18 Billion |
Growth Rate (2026 - 2031) | 4.23 % |
Fastest Growing Market | North America |
Largest Market | South America |
Market Concentration | Medium |
Major Players*Disclaimer: Major Players sorted in no particular order

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Market Overview

Seed Treatment Market Analysis by Mordor Intelligence

Seed treatment market size in 2026 is estimated at USD 9.9 billion, growing from 2025 value of USD 9.5 billion with 2031 projections showing USD 12.18 billion, growing at 4.23% CAGR over 2026-2031. Market expansion is propelled by precision-agriculture platforms that enable micro-dosing, a surge in biological formulations that comply with stricter residue rules, and escalating adoption of high-value hybrid and genetically modified seeds. Sustained investments in polymer encapsulation have reduced dust-off emissions to meet European and North American safety thresholds, while regulatory incentives reward low-residue coatings and expedite the approval of biological products. Competitive dynamics remain in flux as strategic alliances between agrochemical majors and biotech start-ups shorten product-development cycles and diversify seed-applied nematicide options. Moderate concentration leaves headroom for specialized players that can combine proprietary microorganisms with advanced coating chemistries and offer bundled agronomic services.

Key Report Takeaways* By function, insecticides led the seed treatment market with a 71.35% market share in 2025 and are projected to record the fastest growth of 4.61% CAGR through 2031.

* By crop type, grains and cereals accounted for 41.75% of the seed treatment market size in 2025, whereas pulses and oilseeds are anticipated to advance at a 4.48% CAGR to 2031.

* By geography, South America captured 44.10% of the seed treatment market share in 2025, while North America is forecast to expand at a 4.66% CAGR between 2026 and 2031.

* The seed treatment market is moderately concentrated, with the top five suppliers accounting for less than 50% of global revenue.

Key Market Trends

Market Trends and Insights

Drivers	Impact Analysis of Seed Treatment Market*	Driver I (~) % Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Surge in biological seed-treatment R&D partnerships	+0.8%	Global with Asia Pacific leadership	Medium term (2-4 years)	
Precision-agriculture driven micro-dosing demand	+0.7%	North America and Europe	Short term (≤ 2 years)	
Shift to polymer encapsulation for reduced dust-off	+0.6%	Europe and North America	Medium term (2-4 years)	
Regulatory incentives favoring low-residue coatings	+0.5%	Europe, North America, emerging Asia Pacific	Long term (≥ 4 years)	
Growth in GMO and high-value hybrid seed adoption	+0.9%	Global, strongest in Americas	Short term (≤ 2 years)	
Expansion of seed-applied nematicides for soy and corn	+0.7%	South America, United States corn belt	Medium term (2-4 years)	

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Market concentration remains moderate, with the top five suppliers accounting for less than 50% of global revenue. Notably, Syngenta leads, followed by Bayer and BASF. Scale affords these firms unmatched distribution, R&D, and regulatory resources. Yet, the seed treatment market leaves ample room for specialists to leverage patented microbial strains, RNAi technology, and biodegradable polymers that satisfy emerging sustainability metrics.

Companies are investing in bio-based treatments and environmentally friendly formulations to meet growing demand for sustainable agriculture practices. Building strong relationships with seed companies and agricultural service providers has become crucial for maintaining market share. Expanding presence in emerging markets through localized solutions and technical support remains a key growth strategy. Patent-filing volumes, with 340 biological versus 89 synthetic applications, signal where competitive intensity is migrating.

Regulatory mastery differentiates leaders. Microbial facilities must comply with dual Environmental Protection Agency (EPA) and Food and Drug Administration (FDA) standards, a barrier many start-ups bypass by partnering with incumbents. In emerging markets, domestic firms exploit faster local approvals and cost advantages, prompting global companies to localize production or acquire regional competitors. Vertical integration into polymer manufacturing hedges supply risk and captures additional margin as advanced coatings gain traction across the seed treatment market.

Seed Treatment Industry Leaders* BASF SE

- * Bayer AG
- * Corteva Agriscience
- * FMC Corporation
- * Syngenta Group

* *Disclaimer: Major Players sorted in no particular order
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Component Component 3 Scope Of The Report Bottom

Global Seed Treatment Market Report ScopeFungicide, Insecticide, Nematicide are covered as segments by Function. Commercial Crops, Fruits & Vegetables, Grains & Cereals, Pulses & Oilseeds, Turf & Ornamental are covered as segments by Crop Type. Africa, Asia-Pacific, Europe, North America, South America are covered as segments by Region.FunctionFungicide |
Insecticide |
Nematicide |

Segmentation Accordion Item

RegionAfrica | By Country | South Africa |
| | Rest of Africa |
Asia-Pacific | By Country | Australia |
	China
	India
	Indonesia
	Japan
	Myanmar
	Pakistan
	Philippines
	Thailand
	Vietnam
	Rest of Asia-Pacific
Europe	By Country
	Germany
	Italy
	Netherlands
	Russia
	Spain

		Ukraine	
		United Kingdom	
		Rest of Europe	
North America		By Country	
		Mexico	
		United States	
		Rest of North America	
South America		By Country	
		Brazil	
		Chile	
		Rest of South America	

Frequently Asked Questions

What is the global value of the seed treatment market in 2026?

It is USD 9.9 billion and is projected to climb to USD 12.18 billion by 2031.

Which region represents the largest revenue share for Seed Treatment products?

South America accounts for 44.10% of 2025 sales, driven by intensive soybean and corn acreage.

Which functional segment of Seed Treatment products grows the fastest?

Insecticide treatments post the highest CAGR of 4.61% as soybean cyst and root-knot pressures rise.

Which companies lead global Seed Treatment sales?

Syngenta Group, Bayer AG, and BASF SE together hold about one-third of global revenue, with Syngenta on top.