

Global Seed Treatment: Market Analysis of Both Chemical and Pesticide Seed Treatments

Base Year: 2023 The study is a comprehensive analysis with two volumes of data, one including chemical treatments and the other covering pesticide seed treatments. It is designed to provide suppliers with the latest information on the size, structure, and outlook for seed treatments in each of the 4 regions and 12 featured countries.

To be Published: Q2 2024

Regional Coverage:

North America	South America	Europe	Asia-Pacific
<ul style="list-style-type: none">• Canada• United States	<ul style="list-style-type: none">• Argentina• Brazil	<ul style="list-style-type: none">• France• Germany• Italy• Spain• United Kingdom	<ul style="list-style-type: none">• Australia• China• India



SCOPE

- › The report offers a double volume analysis of the global market for seed treatment:
 - › Volume I focuses on chemical additives to seeds, including adjuvants and other additives.
 - › Volume II focuses on seed treatment pesticide products, including applications for seed and seedling protection, such as fungicides, insecticides, nematicides, and biopesticides.

**FEATURES INTERACTIVE
DATABASE**

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Volume I: Seed Treatments Chemicals/Adjuvants

Product scope:

- Adjuvants
 - Surfactants
 - Buffering agents
 - Compatibility agents
 - pH adjusters
- Stabilizers
- Binders
- Coloring agents
- Fillers/Carriers

Regional Analysis

Each regional chapter will cover the following:

Introduction

Background seed treatment market information

Regulatory landscape

Adjuvant/Additives consumption:

- Volume/Value
- Market dynamics
- Consumption trends

Value chain analysis

Competitive landscape including market shares of leading suppliers at chemistry level

TABLE 1: PRODUCT EXAMPLES, 2023

Category		Examples of chemistries covered
Adjuvants	Surfactants	Alkyl aryl sulfonates, alkyl polyglucosides
	Buffering agents	Citric acid, potassium phosphate
	Compatibility agents	PEG, glycerol, Propylene glycol, PVP
	pH adjusters	
Stabilizers		Antioxidants (BHT, tocopherols), EDTA
Binders		PVA, CMC
Coloring agents		Pigments, dyes
Fillers/Carriers		Attapulgate clay, kaolin clay, vermiculite

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Volume II: Agrochemical Pesticide Seed Treatments

Technical Overview

- Description of diseases, insects, nematodes, and other reasons that seeds are treated
- Control mechanisms, current active ingredients, and select products under development
- Product formulations, rates and application issues, and opportunities
- Seed treatment methods
- Interface between seed treatment and biotechnology

TABLE 1: CROP COVERAGE, 2023*

Corn/Maize	Cotton
Soybeans	Sunflowers
Wheat	Canola/Rape
Potatoes	Sorghum
Rice	Other
Sugar beets	

* Coverage dependent on country



Country Analysis

Each country section contains the following topics for crops relevant to the country:

- Crop background
- Plant nutrients used in seed treatment by country and crop, where applicable
- Planted acres and seeding rate for estimates of seed consumption
- Crop end use by acres or volume
- Production and crop protection method
- Role of seed treatment as a crop protection method
- Key diseases, insects, nematodes, and other reasons for seed treatments
- Target disease or pest for each active ingredient
- Non-chemical alternatives
- Sanitation
- Biocontrols
- Biotechnology
- Brand sales and market share for seed treatment products
- Sales by agrochemical supplier for seed treatment products
- Overview of companies selling treated seeds
- Five-year outlook and assumptions by crop (2023–2028)

REPORT BENEFITS

This report serves as an excellent resource for crop protection manufacturers for developing and executing marketing plans, providing:

A highly reliable and independent assessment of the competitive positions of the major seed treatment suppliers, by product sales and market shares

An assessment of strengths and weaknesses for current products to help marketers increase their presence in the industry

An overview of the cultural practices used by growers and the role of seed treatments to help product developers increase market penetration

METHODOLOGY

Kline's approach places principal emphasis on primary research techniques to ensure that the foundation of business intelligence and insight is accurate, current, and reliable. Building on our 60-plus years in the business and leveraging our worldwide network of offices, our teams of seasoned professionals draw upon pragmatic industrial and commercial experience to understand and interpret global impacts and local perspectives. Our industry expertise is elevated by technology and systematic data collection processes to deliver more predictive and actionable data and insights.

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