

## Report Information

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# Biological Seed Treatment Market Research Report – Global Forecast till 2030

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## Description:

### Global Biological Seed Treatment Market Overview

Biological Seed Treatment Market Size was valued at USD 5.7 billion in 2022. The Biological Seed Treatment market industry is projected to grow from USD 6.2 Billion in 2023 to USD 10.4 billion by 2030, exhibiting a compound annual growth rate (CAGR) of 9.1% during the forecast period (2023 - 2030). The market for biological seed treatment has drastically changed in recent years. Natural seed treatment techniques are viewed as an environmentally friendly alternative. Growing consumer desire for better-quality and healthier agricultural goods is the leading market drivers for the biological seed treatment market worldwide

[Biological Seed Treatment Market Overview](#)

**Source: Secondary Research, Primary Research, MRFR Database and Analyst Review**

### Biological Seed Treatment Market Trends

- **Environmental Concerns Associated with Chemical Seed Treatments to boost market growth**

Biological seed treatment functions as a biostimulant on plants, causing them to develop more vigorously and better. Because they reduce biotic stress and strengthen the immune system to combat plant diseases, they also increase crop yields. Using biological seed treatment increases plant nutrient availability and uptake in the roots of the plants. Moreover, it aids with colonizing roots by microorganisms, protecting the plants' habitat.

Using biological seed treatment reduces the dependency on agrochemicals, thus reducing the exposure to chemicals and the impact on the environment. All these factors are significant drivers boosting the growth of biological seed treatment globally. The use of chemical seed treatment negatively impacts the environment as it seriously affects pollinators and is toxic to honeybees. As active organisms such as microbes are used for seed treatment, they are safe and don't negatively affect the growth of the biological seed treatment globally. Over the projection period, the sector is anticipated to rise because of the surge in demand for crops grown without chemicals. A change in consumer tendencies towards enhancing individual health and consuming nutritious meals will probably fuel the demand for the product. Furthermore, the growing older population is projected to stimulate the demand further. These factors are enhancing the growth of the Biological Seed Treatment market CAGR globally in recent years.

Because it aids in preventing infections and diseases that are seed- and soil-borne, the product's use in agricultural techniques has increased significantly. As the desire for sustainable agriculture increased, and the risk of exceeding residue limitations decreased, the product began to take precedence over chemical treatment. Furthermore, it is anticipated that the expanding trend of organic farming will directly impact the market penetration of the Biological Seed Treatment market revenue.

### Biological Seed Treatment Market Segment Insights

#### Biological Seed Treatment Type Insights

Based on Type, the Biological Seed Treatment Market segmentation includes Microbials and Botanicals. The microbial biological seed treatment segment held the majority share in 2022, contributing to around ~75-77% of the Biological Seed Treatment Market revenue. To get rid of the pathogens and enhance seed health, microbial therapy uses bacteria, including Rhizobia, Bacillus, Pseudomonas, Streptomyces, and fungi like mycorrhizae, Penicillium bilaii, and Trichoderma harzianum. They successfully shield crops from pests, insects, plant diseases, and dehydration.

**April 2022:** Koppert Biological Systems purchased Geocom, a company that uses geoprocessing

technology to apply biological agents to crops. This acquisition aids Koppert Biological Systems in enhancing the effectiveness of its products and boosting crop protection.

**July 2022:** For maize and canola crops, Corteva Agriscience has introduced two new seed treatment packages containing various new products to aid growers in broad-spectrum pest and disease control.

**May 2022:** To protect early-season rice seeds from the rice blast fungus and improve crop output and resource efficiency for rice producers, Bayer introduced Routine Start.

### Biological Seed Treatment Crop Type Insights

The Biological Seed Treatment Market segmentation, based on crop type, includes oilseeds & pulses, cereals & grains, and fruits & vegetables. The segment of fruits and vegetable crops, which made for the maximum occupancy of all crop kinds' revenue in 2021, is expected to rise to the maximum CAGR. The market is anticipated to increase throughout the projected period due to rising consumer interest in leading healthy lifestyles, increasing use of biopesticides for treating vegetable seeds, and rising demand for food products free of chemicals. Hence, rising applications of biological seed treatment for fruits and vegetables positively impact market growth.

### Figure 1: Biological Seed Treatment Market, by Crop Type, 2022 & 2030 (USD billion)

#### Biological Seed Treatment Market, by Crop Type, 2022 & 2030

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

### Biological Seed Treatment Function Insights

Based on Function, the global Biological Seed Treatment industry has been segmented into seed protection and seed enhancement. Regarding revenue, the seed protection category accounted for the maximum share in 2021. In the coming years, industry growth is anticipated to be driven by increased crop loss caused by elements such as contaminated seeds and biotic and abiotic stress. Furthermore, it is projected that the popularity of natural protectants will increase due to customers' increased preference for organic food.

### Biological Seed Treatment Regional Insights

By Region, the study provides market insights into North America, Europe, Asia-Pacific, and the Rest of the World. North America Biological Seed Treatment market accounted for USD 2.6 billion in 2022 and is expected to exhibit a significant CAGR growth during the study period. The rising adoption of organic farming in countries such as the U.S., Mexico, and Canada is anticipated to drive the industry. Canada and Mexico are the major exporters of grains all over the world.

Further, the major countries studied in the market report are: The U.S, Canada, Germany, France, UK, Italy, Spain, China, Japan, India, Australia, South Korea, and Brazil.

### Figure 2: BIOLOGICAL SEED TREATMENT MARKET SHARE BY REGION 2022 (%)

#### BIOLOGICAL SEED TREATMENT MARKET SHARE BY REGION 2022

Source: Secondary Research, Primary Research, MRFR Database and Analyst Review

Europe Biological Seed Treatment market accounts for the second-largest market share due to the rising number of farmers employing biological seed treatment to safeguard the seeds and crops from infections, pests, and nematodes to produce a sizeable crop. Further, the Germany Biological Seed Treatment market held the largest market share, and the UK Biological Seed Treatment market was the fastest-growing market in the European region

The Asia-Pacific Biological Seed Treatment Market is expected to grow at the fastest CAGR from 2022 to 2030. Future product demand is anticipated to be driven by the robust agricultural sector expansion in nations including Sri Lanka, Bangladesh, China, India, and the former Soviet Union. Moreover, China Biological Seed Treatment market held the largest market share, and the India Biological Seed Treatment market was the fastest-growing market in the Asia-Pacific region

For instance, India Biological Seed Treatment market is the favored destination for the biological seed treatment market growth. Furthermore, it is anticipated that the demand for food and agricultural products will continue to be driven by the growing population and rising income. The main drivers of market expansion are the need for higher-quality seeds and the rising popularity of agriculture in the area. Seed treatments are necessary for essential crops like cereals (corn and barley) and fodder plants (alfalfa, clover, and rapeseed) to prevent anthrax diseases such as decay and bare smut. Moreover, seed treatments can help the crop's early development. As a result, the manganese and zinc-based seed treatments, which boost the plant's root system, are becoming increasingly common in the area.

### Biological Seed Treatment Key Market Players & Competitive Insights

Major market players are increasing their spending on their R&D departments to widen their presence further. To further increase their footprint, the global market leaders utilize key market developments such as new product launches, contractual agreements, mergers and acquisitions, increased investments, and collaboration with other organizations. Additionally, the global Biological Seed Treatment industry offers its products at a moderate price to attract an increasing consumer base.

The market leaders in the global Biological Seed Treatment industry are looking at expanding their supply chains to increase their profit margins. During the forecast period, the Biological Seed Treatment industry market leaders will provide players with the most innovative products. The Biological Seed Treatment market major player such as BASF SE (Germany), Bayer AG (Germany), Syngenta AG (Switzerland), The Monsanto Company (US), Valent BioSciences LLC (US), and others are working on expanding the market demand by investing in research and development activities.

With its management headquarters in Basel, Switzerland, Syngenta AG provides agricultural research and technology, focusing mainly on seeds and insecticides. ChemChina, a state-owned company in China, owns it. The agrichemical divisions of Novartis and AstraZeneca were combined to become Syngenta, which was later purchased by China National Chemical Company (ChemChina) in 2017. Its business divisions are Syngenta Crop Protection, Syngenta Seeds, Adama, and Syngenta Group China. The Syngenta Group, which unites Syngenta, Adama, and Sinochem's agriculture division under one organization, was established in 2020.

The most significant chemical producer in the world is BASF SE, a global chemical corporation based in Europe with German pronunciation. More than 190 nations have placed orders with BASF, serving various sectors. Almost 54,000 of the company's 117,628 employees were based in Germany as of the end of 2019. BASF reported €59.3 billion in revenue and €4.5 billion in operating income before exceptional items in 2019. The business invested €5.6 billion in Asia between 1990 and 2005, particularly in locations close to Nanjing and Shanghai in China and Mangalore in India

#### **Key Companies in the Biological Seed Treatment market include**

- BASF SE (Germany)
- Bayer AG (Germany)
- Syngenta AG (Switzerland)
- The Monsanto Company (US)
- Valent BioSciences LLC (US)
- Verdesian Life Sciences LLC (US)
- Plant Health Care Inc. (US)
- Precision Laboratories LLC (US)
- Koppert B.V. (Netherlands)
- Italpollina spa (Italy), among others

#### **Biological Seed Treatment Industry Developments**

**May 2022:** FytoSave, a fungicide co-developed by Biobest Group and FytoFend, was launched in Finland and other Scandinavian countries. This has triggered the crops' natural defenses against powdery and downy mildew. The launch of FytoSave in Finland and other Scandinavian countries is helping Biobest expand their products offering towards these regions.

**May 2022:** UPL Group announced they were acquiring OptiCHOS, a naturally derived fungicide from BioCHOS, a spin-off of the Norwegian University of Life Science. BioCHOS was formulated as a biodegradable broad-spectrum disease control solution with low environmental and human impact. The product acquisition would help UPL expand its NPP portfolio and target markets suitable to the product to address farmers' needs.

#### **Biological Seed Treatment Market Segmentation**

##### **Biological Seed Treatment Crop Type Outlook**

- Oilseeds & Pulses
- Cereals & Grains
- Fruits & Vegetables

##### **Biological Seed Treatment Type Outlook**

- Microbials
- Botanicals

##### **Biological Seed Treatment Product Type Outlook**

- Seed Protection
- Seed Enhancement

## Biological Seed Treatment Regional Outlook

- North America
  - US
  - Canada
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Spain
  - Rest of Europe
- Asia-Pacific
  - China
  - Japan
  - India
  - Australia
  - South Korea
  - Australia
  - Rest of Asia-Pacific
- Rest of the World

### Table of Content:

Contents	
TABLE OF CONTENTS	
1 Executive Summary	
2 Scope of the Report	
2.1 Market Definition	
2.2 Scope of the Study	
2.2.1 Research Objectives	
2.2.2 Assumptions & Limitations	
2.3 Markets Structure	
3 Market Research Methodology	
3.1 Research Function	
3.2 Secondary Research	
3.3 Primary Research	
3.4 Forecast Model	
4 Market Landscape	
4.1 Supply Chain Analysis	
4.1.1 Raw Material Suppliers	
4.1.2 Manufacturers/Producers	
4.1.3 Distributors/Retailers/Wholesalers/E-Commerce	
4.1.4 End Users	
4.2 Porter's Five Forces Analysis	
4.2.1 Threat of New Entrants	
4.2.2 Bargaining Power of Buyers	
4.2.3 Bargaining Power of Suppliers	

- 4.2.4 Threat of Substitutes
- 4.2.5 Internal Rivalry
- 5 Market Dynamics of Global Biological Seed Treatment Market
- 5.1 Introduction
- 5.2 Drivers
- 5.3 Restraints
- 5.4 Opportunities
- 5.5 Challenges
- 6. Global Biological Seed Treatment Market, by Type
- 6.1 Introduction
- 6.2 Microbials
- 6.2.1 Market Estimates & Forecast, 2023-2030
- 6.2.2 Market Estimates & Forecast, by Region, 2023-2030
- 6.3 Botanicals
- 6.3.1 Market Estimates & Forecast, 2023-2030
- 6.3.2 Market Estimates & Forecast, by Region, 2023-2030
- 7. Global Biological Seed Treatment Market, by Crop Type
- 7.1 Introduction
- 7.2 Oilseeds and Pulses
- 7.2.1 Market Estimates & Forecast, 2023-2030
- 7.2.2 Market Estimates & Forecast, by Region, 2023-2030
- 7.3 Cereals and Grains
- 7.3.1 Market Estimates & Forecast, 2023-2030
- 7.3.2 Market Estimates & Forecast, by Region, 2023-2030
- 7.4 Fruits and Vegetables
- 7.4.1 Market Estimates & Forecast, 2023-2030
- 7.4.2 Market Estimates & Forecast, by Region, 2023-2030
- 7.5 Others
- 7.5.1 Market Estimates & Forecast, 2023-2030
- 7.5.2 Market Estimates & Forecast, by Region, 2023-2030
- 8. Global Biological Seed Treatment Market, by Function
- 8.1 Introduction
- 8.2 Seed Protection
- 8.2.1 Market Estimates & Forecast, 2023-2030
- 8.2.2 Market Estimates & Forecast, by Region, 2023-2030
- 8.3 Seed Enhancement
- 8.3.1 Market Estimates & Forecast, 2023-2030
- 8.3.2 Market Estimates & Forecast, by Region, 2023-2030
- 9. Global Biological Seed Treatment Market, by Region
- 9.1 Introduction
- 9.2 North America
- 9.2.1 Market Estimates & Forecast, 2023-2030
- 9.2.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.2.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.2.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.2.5 US
- 9.2.5.1 Market Estimates & Forecast, 2023-2030
- 9.2.5.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.2.5.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.2.5.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.2.6 Canada
- 9.2.6.1 Market Estimates & Forecast, 2023-2030
- 9.2.6.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.2.6.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.2.6.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.2.7 Mexico
- 9.2.7.1 Market Estimates & Forecast, 2023-2030
- 9.2.7.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.2.7.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.2.7.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.3 Europe
- 9.3.1 Market Estimates & Forecast, 2023-2030
- 9.3.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.3.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.3.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.3.5 Germany
- 9.3.5.1 Market Estimates & Forecast, 2023-2030
- 9.3.5.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.3.5.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.3.5.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.3.6 France
- 9.3.6.1 Market Estimates & Forecast, 2023-2030
- 9.3.6.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.3.6.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.3.6.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.3.7 Italy
- 9.3.7.1 Market Estimates & Forecast, 2023-2030
- 9.3.7.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.3.7.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.3.7.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.3.8 Spain
- 9.3.8.1 Market Estimates & Forecast, 2023-2030
- 9.3.8.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.3.8.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.3.8.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.3.9 UK
- 9.3.9.1 Market Estimates & Forecast, 2023-2030
- 9.3.9.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.3.9.3 Market Estimates & Forecast, by Crop Type, 2023-2030
- 9.3.9.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.3.10 Rest of Europe
- 9.3.10.1 Market Estimates & Forecast, 2023-2030
- 9.3.10.2 Market Estimates & Forecast, by Type, 2023-2030
- 9.3.10.3 Market Estimates & Forecast, by Crop Type, 2023-2030

- 9.3.10.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.4 Asia-Pacific
  - 9.4.1 Market Estimates & Forecast, 2023-2030
  - 9.4.2 Market Estimates & Forecast, by Type, 2023-2030
  - 9.4.3 Market Estimates & Forecast, by Crop Type, 2023-2030
  - 9.4.4 Market Estimates & Forecast, by Function, 2023-2030
  - 9.4.5 China
    - 9.4.5.1 Market Estimates & Forecast, 2023-2030
    - 9.4.5.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.4.5.3 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.4.5.4 Market Estimates & Forecast, by Function, 2023-2030
  - 9.4.6 India
    - 9.4.6.1 Market Estimates & Forecast, 2023-2030
    - 9.4.6.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.4.6.3 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.4.6.4 Market Estimates & Forecast, by Function, 2023-2030
  - 9.4.7 Japan
    - 9.4.7.1 Market Estimates & Forecast, 2023-2030
    - 9.4.7.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.4.7.3 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.4.7.3 Market Estimates & Forecast, by Function, 2023-2030
  - 9.4.8 Australia & New Zealand
    - 9.4.8.1 Market Estimates & Forecast, 2023-2030
    - 9.4.8.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.4.8.4 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.4.8.3 Market Estimates & Forecast, by Function, 2023-2030
  - 9.4.9 Rest of Asia-Pacific
    - 9.4.9.1 Market Estimates & Forecast, 2023-2030
    - 9.4.9.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.4.9.3 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.4.9.4 Market Estimates & Forecast, by Function, 2023-2030
- 9.5 Rest of the World (RoW)
  - 9.5.1 Market Estimates & Forecast, 2023-2030
  - 9.5.2 Market Estimates & Forecast, by Type, 2023-2030
  - 9.5.3 Market Estimates & Forecast, by Crop Type, 2023-2030
  - 9.5.4 Market Estimates & Forecast, by Function, 2023-2030
  - 9.5.5 South America
    - 9.5.5.1 Market Estimates & Forecast, 2023-2030
    - 9.5.5.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.5.5.3 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.5.5.4 Market Estimates & Forecast, by Function, 2023-2030
  - 9.5.6 Middle East
    - 9.5.6.1 Market Estimates & Forecast, 2023-2030
    - 9.5.6.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.5.6.3 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.5.6.4 Market Estimates & Forecast, by Function, 2023-2030
  - 9.5.7 Africa
    - 9.5.7.1 Market Estimates & Forecast, 2023-2030
    - 9.5.7.2 Market Estimates & Forecast, by Type, 2023-2030
    - 9.5.7.3 Market Estimates & Forecast, by Crop Type, 2023-2030
    - 9.5.7.4 Market Estimates & Forecast, by Function, 2023-2030
- 10. Company Landscape
  - 10.1 Introduction
  - 10.2 Market Strategy
  - 10.3 Key Development Analysis  
(Expansions/ Mergers and Acquisitions/ Joint Ventures/ New Product Developments/ Agreements/ Investments)
- 11. Company Profiles
  - 11.1 BASF SE (Germany)
    - 11.1.1 Company Overview
    - 11.1.2 Financial Updates
    - 11.1.3 Product/Business Segment Overview
    - 11.1.4 Strategy
    - 11.1.5 Key Developments
    - 11.1.6 SWOT Analysis
  - 11.2 Bayer AG (Germany)
    - 11.2.1 Company Overview
    - 11.2.2 Financial Updates
    - 11.2.3 Product/Business Segment Overview
    - 11.2.4 Strategy
    - 11.2.5 Key Developments
    - 11.2.6 SWOT Analysis
  - 11.3 Syngenta Crop Protection AG (Switzerland)
    - 11.3.1 Company Overview
    - 11.3.2 Financial Updates
    - 11.3.3 Product/Business Segment Overview
    - 11.3.4 Strategy
    - 11.3.5 Key Developments
    - 11.3.6 SWOT Analysis
  - 11.4 The Monsanto Company (US)
    - 11.4.1 Company Overview
    - 11.4.2 Financial Updates
    - 11.4.3 Product/Business Segment Overview
    - 11.4.4 Strategy
    - 11.4.5 Key Developments
    - 11.4.6 SWOT Analysis
  - 11.5 Valent BioSciences LLC (US)
    - 11.5.1 Company Overview
    - 11.5.2 Financial Updates
    - 11.5.3 Product/Business Segment Overview
    - 11.5.4 Strategy
    - 11.5.5 Key Developments
    - 11.5.6 SWOT Analysis
  - 11.6 Verdesian Life Sciences, LLC (US)

11.6.1	Company Overview
11.6.2	Financial Updates
11.6.3	Product/Business Segment Overview
11.6.4	Strategy
11.6.5	Key Developments
11.6.6	SWOT Analysis
11.7	Plant Health Care, Inc. (US)
11.7.1	Company Overview
11.7.2	Financial Updates
11.7.3	Product/Business Segment Overview
11.7.4	Strategy
11.7.5	Key Developments
11.7.6	SWOT Analysis
11.8	Precision Laboratories, LLC (US)
11.8.1	Company Overview
11.8.2	Financial Updates
11.8.3	Product/Business Segment Overview
11.8.4	Strategy
11.8.5	Key Developments
11.8.6	SWOT Analysis
11.9	Koppert B.V. (Netherlands)
11.9.1	Company Overview
11.9.2	Financial Updates
11.9.3	Product/Business Segment Overview
11.9.4	Strategy
11.9.5	Key Developments
11.9.6	SWOT Analysis
11.10	Italpollina spa (Italy)
11.10.1	Company Overview
11.10.2	Financial Updates
11.10.3	Product/Business Segment Overview
11.10.4	Strategy
11.10.5	Key Developments
11.10.6	SWOT Analysis
12.	Conclusion

#### LIST OF TABLES

Table 1	Global Biological Seed Treatment Market, by Region, 2023-2030 (USD Million)
Table 2	Global Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 3	Global Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 4	Global Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 5	North America: Biological Seed Treatment Market, by Country, 2023-2030 (USD Million)
Table 6	North America: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 7	North America: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 8	North America: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 9	US: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 10	US: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 11	US: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 12	Canada: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 13	Canada: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 14	Canada: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 15	Mexico: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 16	Mexico: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 17	Mexico: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 18	Europe: Biological Seed Treatment Market, by Country, 2023-2030 (USD Million)
Table 19	Europe: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 20	Europe: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 21	Europe: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 22	Germany: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 23	Germany: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 24	Germany: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 25	France: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 26	France: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 27	France: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 28	Italy: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 29	Italy: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 30	Italy: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 31	Spain: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 32	Spain: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 33	Spain: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 34	UK: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 35	UK: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 36	UK: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 37	Rest of Europe: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 38	Rest of Europe: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 39	Rest of Europe: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 40	Asia-Pacific: Biological Seed Treatment Market, by Country, 2023-2030 (USD Million)
Table 41	Asia-Pacific: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 42	Asia-Pacific: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 43	Asia-Pacific: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 44	China: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 45	China: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 46	China: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 47	India: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 48	India: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 49	India: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 50	Japan: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 51	Japan: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 52	Japan: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 53	Australia & New Zealand: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)
Table 54	Australia & New Zealand: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)
Table 55	Australia & New Zealand: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)
Table 56	Rest of Asia-Pacific: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)

Table 57 Rest of Asia-Pacific: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)  
 Table 58 Rest of Asia-Pacific: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)  
 Table 59 Rest of the World (RoW): Biological Seed Treatment Market, by Country, 2023-2030 (USD Million)  
 Table 60 Rest of the World (RoW): Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)  
 Table 61 Rest of the World (RoW): Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)  
 Table 62 Rest of the World (RoW): Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)  
 Table 63 South America: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)  
 Table 64 South America: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)  
 Table 65 South America: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)  
 Table 66 Middle East: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)  
 Table 67 Middle East: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)  
 Table 68 Middle East: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)  
 Table 69 Africa: Biological Seed Treatment Market, by Type, 2023-2030 (USD Million)  
 Table 70 Africa: Biological Seed Treatment Market, by Crop Type, 2023-2030 (USD Million)  
 Table 71 Africa: Biological Seed Treatment Market, by Function, 2023-2030 (USD Million)

#### LIST OF FIGURES

FIGURE 1 Global Biological Seed Treatment Market Segmentation  
 FIGURE 2 Forecast Research Methodology  
 FIGURE 3 Five Forces Analysis of Global Biological Seed Treatment Market  
 FIGURE 4 Value Chain of Global Biological Seed Treatment Market  
 FIGURE 5 Share of Global Biological Seed Treatment Market in 2023, by Country (%)  
 FIGURE 6 Global Biological Seed Treatment Market, 2023-2030  
 FIGURE 7 Global Biological Seed Treatment Market Size by Type, 2023  
 FIGURE 8 Share of Global Biological Seed Treatment Market, by Type, 2023-2030  
 FIGURE 9 Global Biological Seed Treatment Market Size by Crop Type, 2023  
 FIGURE 10 Share of Global Biological Seed Treatment Market, by Crop Type, 2023-2030  
 FIGURE 11 Global Biological Seed Treatment Market Size, by Function, 2023  
 FIGURE 12 Share of Global Biological Seed Treatment Market, by Function, 2023-2030