

A Special Report From **CropLife**



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SEED
CARE
REPORT

Although many categories have had an uneven year in 2024, seed treatments remain a key part of the agricultural business. An examination of what the present and future hold for this sector.

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The seed treatment market continues to deliver return on investment.

Growing Expectations

BY DAN JACOBS
SENIOR EDITOR

BEFORE SEEDS GO INTO THE GROUND, growers ensure their crops receive the treatments they need.

“In 2024, the seed treatment industry is evolving,” says Paul Johnson, Seed Treatment Market Manager at Wilbur-Ellis. “We are continuing to experience growth, but we are also observing a trend where some markets are trading down the value ladder, prioritizing more cost-effective solutions over premium products.”

According to Blake Murnane, Manager of Product Development, CHS “The seed treatment industry in 2024 was strong for downstream treating in the upper Midwest. Total soybean acres in 2024 were estimated to be 87.1

million acres, which was a 4% increase over the previous year. Soybeans really have two treatment options — pathogen protection with synthetic chemistries and nitrogen-fixation with inoculant treatments. The increased acreage in soybean production drove an increase in both those seed treatment categories last year.”

The market is complex and continues to evolve.

“The seed treatment business continues to be a dynamic area,” says Brad Van Kooten, Seed Applied Technology Leader, Corteva Agriscience.

In addition, seed treatments continue to grow “in spite of substantial channel destocking in 2024, as farmers adopt technology innovations to address critical challenges including Sudden Death Syndrome (SDS) for soybean and the control of plant-parasitic

nematodes,” says Quinn Showalter, Head of Seedcare and Biologicals, North America, Syngenta. “We see robust growth and significant opportunities in the U.S.”

Like pesticides that are manufactured to target specific pests, so too have seed treatments.

“With newer chemistries entering the market that are laser-focused on certain pathogens, we’re seeing a trend to utilize these chemistries along with well-tested proven chemistries to develop a well-balanced seed treatment approach to protecting seed from a wide range of pathogens and pests,” says CHS’ Murnane. “It is an exciting time in the seed treatment industry to see these different chemistries work in synchronization with each other.”

Drivers

“Yield is the driving factor for seed treatments,” says Murnane. “Without it, a grower may struggle when commodity prices are low and miss out on opportunities to grow when commodity prices are high.”

Two of the industry’s wide-spread challenges have been Soybean Cyst Nematode (SCN) and SDS.

“In the U.S., the persistent increase in the incidence of SDS in soybeans over the past decade has been a significant driver,” says Syngenta’s Showalter. “We’ve also noticed diseases such as red crown rot become much more prevalent; we heard a lot of concern among farmers in the Midwest as red crown rot is potentially even more devastating than SDS.

“This level of customization of seed treatment solutions, especially in certain crops such as corn and cereals,



Photo: Corteva Agrisciences



Above: STI Customized treated seed preparing for planting. (Left) CHS blender working on the STI Customized seed treatment operation. Photos: CHS

allows farmers to address seed treatment technology gaps in the seeds they choose, and to better protect their seed investments,” Showalter continues.

Seed treatments do far more than simply solve pest problems.

“One of the biggest trends over the past few years is to value-added products designed to enhance or even replace traditional fungicide and insecticide treatments,” says Wilbur-Ellis’ Johnson. “Growers are increasingly interested in integrated solutions that offer multiple benefits, such as stress mitigation, enhanced nutrient uptake, and improved root development.”

2025 and Beyond

“I see the seed treatment segment continuing to grow — meaning, not just by finding more untreated acres to treat, but also utilizing new and improved products within a seed treatment for acres currently using seed treatments,” CHS’ Murnane says.

Syngenta’s Showalter agrees the seed treatment market looks bright.

“At Syngenta, we have a robust pipeline of new and highly effective technologies as well as an expanding portfolio of biologicals, and we expect our business to grow on the back of new product launches and greater awareness of the threat from plant-parasitic nematodes,” he says. Much of that optimism comes from the new products that are or will soon be available.

“The use of biologicals is certainly an emerging trend, and we continue to see them being added to seed treatments and used in corn overtreatment,” Showalter says. “We also notice start-up companies create application equipment that increasingly enable on-farm treatment of seeds.”

In the next few years, retailers will have a number of products to offer their grower-customers.

“We screen hundreds of products each year,” Corteva’s Van Kooten says. “The bar is very high to make it into the LumiGEN seed treatment portfolio. Many early-stage experimental products don’t make it but this year, we saw several new products that look promising for future evaluation and testing.

“Traditional chemistries continue to bring tremendous value to our

customers,” Van Kooten says. “And we continue to find new chemistries that provide value to our seed treatment portfolio.”

Manufacturers expect to see continued market growth next year.

“Looking ahead to 2025 and beyond, we expect the seed treatment segment to continue to evolve,” says Wilbur-Ellis’ Johnson. “We will continue to focus on providing the best agronomic solutions that produce the best ROI for the customer. We will maintain our commitment to innovation by collaborating with our crop nutrition and biological teams to develop integrated seed treatment offerings that provide enhanced protection, nutrient availability and improved crop resilience.

Challenges

“Innovation costs and proper outreach all the way down to the grower to show, educate, and indeed, prove the value of innovations in the seed treatment sector,” says CHS’ Murnane.

Syngenta’s Showalter offers another speedbump.

“The largest challenge impacting the seed treatment industry is the urgent need for effective regulatory frameworks around the world that support the efficient introduction of innovative crop protection technologies and seed treatments,” he says. “We also are committed to continuing to raise grower awareness of pests that are not as visible — such as plant-parasitic nematodes in soil — or evolving pest and disease threats such as *Fusarium* stalk rot in corn and *Fusarium* crown rot in wheat.”

“In the U.S., the length of time required to register new crop protection active ingredients has substantially increased following new policies under the Endangered Species Act — in some cases this has doubled,” Syngenta’s Showalter says. “

This is already impacting the ability of U.S. growers to access cutting-edge technologies and innovations and



Photo: Winfield United

is frustrating particularly for U.S. growers who now see farmers in other markets able to use new technologies — including biologicals — more quickly,” he continues. “We also see still quite a lot of ambiguity in terms of what manufacturers can expect and plan for in terms of the speed of the regulatory approval process. All of this is starting to add significant time and obviously the impact of that is putting a huge drag on getting technology to U.S. growers.”

Opportunities


“The biggest opportunities for seed treatments are the biggest threats to a healthy crop,” says CHS’ Murnane. “For example, soybean cyst nematode is the No. 1 pathogen in soybean production. As an industry we have not done a lot to combat this threat both from an education and input standpoint. Our biggest challenge is to get everybody on board on the value of seed treatments through education.”

While the same pests seem to be similar year after year, the solutions designed to tackle that change.

“The biggest opportunity for seed treatment is the ability to bring to market new technologies,” says Syngenta’s Showalter. “Our TYMIRIUM technology and PLINAZOLIN technology are set to be game changers in protecting seeds from nematode, disease and insect pressure, and boosting crops’ production potential. Biological products such as nutrient use efficiency products and biostimulants are just starting to be recognized as contributors to crop yield, and so we are confident to bring more awareness on the science behind these products to the market and a good investment for the growers.”

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Ag retailers see seed care as an integral part of their businesses, today and into the future.

Seed Treatment Continues to Shine

BY ERIC SFILIGOJ
EDITOR

BY ITS NATURE, THE AGRICULTURAL MARKETPLACE regularly experiences ups and downs across its spectrum of products/services offerings. However, the seed treatment sector has remained a source of consistency throughout the past several growing seasons.

According to Jacob “Jake” Larson, Seed Treatment Lead at Asmus Farm Supply (AFS), Rake, IA, this shouldn’t surprise those market observers who have paid attention to industry trends during this timeframe.

“This segment has been a growth vehicle in past years, but now more than ever,” says Larson. “In our area, farmers are turning the corner and beginning to intensely manage soybeans. Growers are now equipped to plant soybeans at the same time as corn or even before. Because of early planting, seed treatment is the first step in the process to reach their high yield goals.”

Kyle McClelland, Seed & Technical Agronomy Manager at BRANDT, Springfield, IL, agrees that soybeans popularity has helped drive seed treatment sales in recent years.

“For BRANDT, seed treatment is a foundation of a high yield strategy for

soybeans,” says McClelland. “Yes, it has grown from fungicide to fungicide and insecticide to now [where] most of our soybeans get a fungicide, insecticide, and nematicide. But it unlocks the yield potential that our team can continue to manage with foliar nutrition and other high management strategies. None of that is possible without planting soybeans early, which treatment enables.”

Outside of the Midwest, in the Mid-South region, the motivation behind seed care’s continued growth is similar.

“Soybeans, cotton, and rice are crops that we have been able to down-stream treat seeds customized to local markets and needs,” says Joey Caldwell, Senior Vice President, Retail at GreenPoint Ag, Decatur, AL. “The demand to plant earlier when conditions are marginal has increased the likelihood of seed treatments to give a positive response. Continued innovation with products that perform at the lower use rates by application directly to the seed is also a contributing factor.”



Joey Caldwell

The numbers from across the ag retail world support Larson’s, McClelland’s, and Caldwell’s views on the continuing importance of seed treatments. According to the 2023 *CropLife 100* survey of the nation’s top ag retailers, 93% of respondents said that their annual sales in seed treat-

ment had grown or remained steady for the 2023 growing season, with only 7% of retailers reporting a decline in sales for this sector. In the recently completed 2024 *CropLife 100* survey, these percentages for seed treatments growth/decline were identical.

A Part of the Production Plan

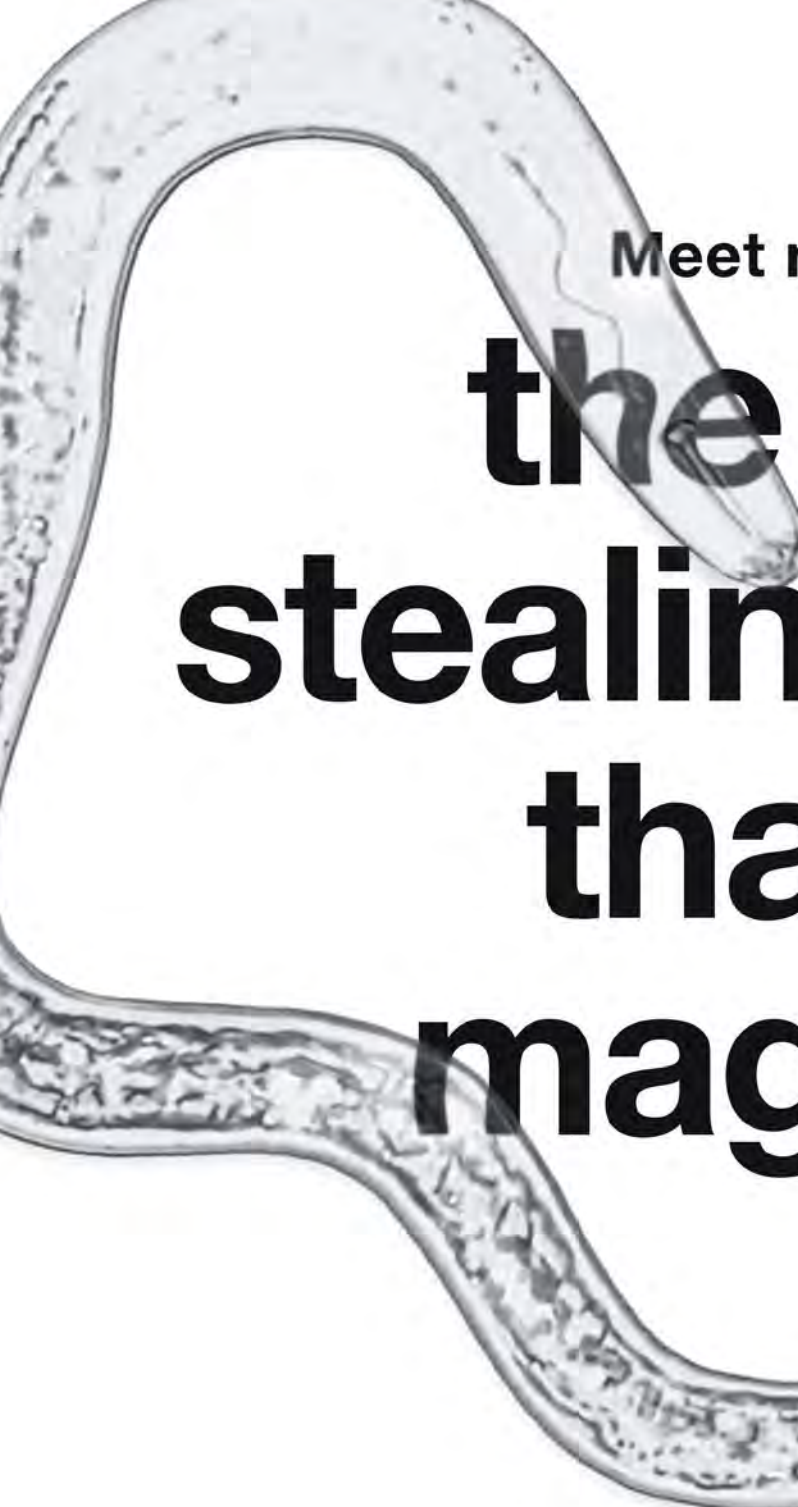
According to Harlan Asmus, Co-Owner of AFS, seed care is just part of the company’s overall strategy to help grower-customers maintain their crop yields regardless of environmental circumstances.

“We think that seed treatment is a part of a production plan,” says Asmus. “It is one part in building a plan to enable the plants to produce grain in a number of negative scenarios. Since our sales staff approaches the practice as a part of a whole plan and we are confident that it pays return-on-investment, most customers listen to the offer and accept our recommendation.”

AFS’ Larson adds to this assessment, pointing out that educating the growers about the benefits of seed treatments is also part of the mix. “I think it’s two parts,” he says. “We have been focusing on the value of seed treatment for years with our growers. The continued efforts show



Harlan Asmus



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them the value and need for seed treatment no matter the planting date or commodity price. Recently we have been dealt a good hand with early planting dates and growers want all the protection they can get.”

BRANDT'S McClelland agrees. “We consistently prove the value to our customers,” he says. “We have colleagues that are trained professionals in the seed treatment space and take pride in their work. We ensure every seed treated in our facilities is handled carefully and given the best opportunity to grow with vigor when it goes in the soil.”

Another ag retailer that sees education as a key part of the equation for seed treatments is Heartland Cooperative, West Des Moines, IA. “The biggest challenge is educating the grower on the differences in products available in the marketplace,” says Chris Behrens, Executive Vice President of Sales and Marketing. “There are many cheap treatments options currently available that don't offer a lot of protection. Are you just getting colored seeds, or are you getting a treatment product that's going to be beneficial in getting your crop off to a solid start? Training our sales team on the benefits of seed treatment comes first. They are the direct link to the grower.”

Partly in response to offer better seed treatment options to grower-customers, Heartland Coop built and launched its own proprietary seed treatment blend and product line in 2024, complete with marketing materials for our sellers.

“This allowed us to tell our own story about a premium product tailored to specific pest issues in our trade area,” says Behrens. “Our proprietary product launch provided a unique opportunity for sales and profit potential in 2024. We saw an increase in percent of units treated, and in most cases, an increase to premium treatment packages.”

In addition to education, another key challenge for ag retailers today touting the advantages of seed treatment is timing, says AFS'

Larson. “Growers now own multiple planters or have upgraded in size or speed,” he says. “We must efficiently treat the same number of units in less time. Treatment scheduling is managed in much more detail. It is no longer waiting for the farmer to show up. We have developed systems to manage the workload.”

A Bright Future

Looking down the road, Larson foresees many more growth years ahead for seed care. “I anticipate seed treatment being a major growth area in the years to come,” he says. “It has become common practice for growers, and they are looking for innovation in this department.”

In his mind, says AFS' Asmus, one of these new innovations could involve a broadening of the in-furrow market involving seed care products. “There will always be value in getting something in the furrow to help young growing plants get established stronger,” he says. “What may be considered seed treatment today may be an in-furrow treatment in the future allowing for newer things to be seed applied.”

BRANDT'S McClelland also predicts a bright future for seed treatments within the marketplace. “Seed treatment will continue to be a building block for growers that want to achieve higher yields than their neighbors,” he says. “As volatile weather continues to plague our early planting aspirations, we will continue to rely on seed treatments of today and the future. The seed lubricant/talc and graphite space continues to evolve. It could potentially be a more efficient and strategic spot to place biologicals, micronutrients, and potentially seed treatment, for higher yields.”

Still, there are a few factors that could potentially challenge the growth of seed treatments for ag retailers over the next few years. According to Heartland Coop's Behrens, one of these could be grower-driven. “As farmers get bigger and look for opportunities to cut costs, we've seen a movement

toward growers purchasing their own seed treaters,” he says. “The change will continue to put pressure on our custom treatment business. However, this transition will allow us the opportunity to sell our custom blend directly into this market segment.”

Another potential hinderance to seed care growth could come from the legislative/legal arena. In June 2023, a lawsuit was filed by the Center for Food Safety and the Pesticide Action Network North America in the federal U.S. District Court of Northern California in San Francisco challenging seed treatments. The groups in the lawsuit alleged that since the neonicotinoid insecticides are commonly used on some treated seed, they can “cause widespread harm to birds, pollinators such as bees, beneficial insects, and endangered species.”

Later that same month, the New York State Legislature passed a bill prohibiting the sale or use of corn, soybeans, or wheat seed coated with five different neonicotinoids unless the state environmental and conservation commissioner determined there was not adequate alternatives. This legislation would go into effect in 2027.

“Increased pressure on neonicotinoid insecticides and the potential trickledown effect to other products could hurt this view,” says AFS' Larson of seed care's future growth.

Perhaps a bigger legislative wild card for seed treatments, says GreenPoint Ag's Caldwell, could come from the recent changes to pesticide regulations tied to the Endangered Species Act (ESA). This legislation is expected to lead to many new regulatory hoops for suppliers, ag retailers, and their grower-customers to jump through over the next few years.

“What about ESA and the impact on labeling for seed treatments?” he says. “Do we continue to have partners in the industry to innovate and advocate for retailer downstream treatment? When I mention innovation, does the kind of soil insight from testing create opportunities for growers to demand greater customization for downstream treatment that greatly increases the return-on-investment?”



Chris Behrens

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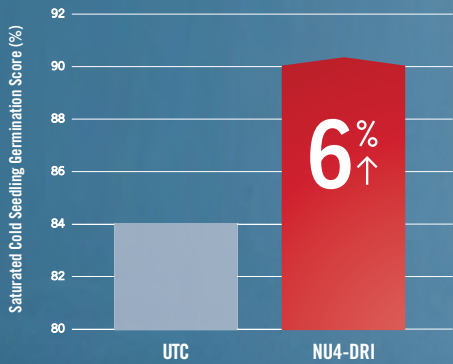
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