

Asia-Pacific Agricultural Biologicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Asia-Pacific Agricultural Biologicals Market size is estimated at USD 8.94 billion in 2024, and is expected to reach USD 13.67 billion by 2029, growing at a CAGR of 8.86% during the forecast period (2024-2029).

Key Highlights

- Macrobials is the Largest Form : Predators dominated the macrobials segment with a market share of 87.1% in 2022. The dominance of the predators' segment is mainly due to their ability to attack pests.
- Organic Fertilizer is the Largest Type : Organic fertilizers are the most consumed fertilizers in Asia pacific region under agricultural biologicals. Manure as organic fertilizer is dominant in the region.
- Row Crops is the Largest Crop Type : The dominance of row crops is mostly attributable to their extensive organic cultivation area, which in 2022 accounted for 67.5% of all organic crop land in the region.
- China is the Largest Country : China is the major market for agricultural biologicals market in the region, and crop nutrition products are holding major market share in the country with 86.4% in 2022.

Asia-Pacific Agricultural Biologicals Market Trends

Crop Nutrition is the largest Function

- In the Asia-Pacific region, agricultural biologicals play a key role in sustainable agriculture. These products reduce the use of chemical fertilizers and pesticides by providing required nutrients and controlling pests and insects in crops. The agricultural

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biologicals market in the region is growing Y-o-Y. From 2017 to 2022, the market value increased by 9.4%.

- The demand for biological solutions in Asia-Pacific is being driven primarily by export markets such as the European Union, which is tightening regulations on the use of some conventional pesticides and local consumer and customer demand for more sustainably grown food. Thus, more growers are showing a growing interest in alternative solutions. The most promising segments are high-value fruits and vegetables (e.g., berries and grapes) eaten fresh and crops grown in greenhouses.

- PAN Asia Pacific (PANAP), one of five regional centers of the Pesticide Action Network, is creating an awareness campaign regarding the harmful effects of pesticides on humans and the environment and promoting biodiversity-based ecological agriculture.

- Countries such as China, India, Australia, and Indonesia are adopting organic farming strategies. China and India are the major countries holding shares of 51.3% and 31.6%, respectively, of the agricultural biologicals market in the region. These countries are implementing different initiatives to encourage organic farming and agricultural biologicals usage widely. For instance, China is planning to reduce 10% and 5% pesticide usage in horticultural crops and row crops, respectively. India, through many initiatives like PKVY and MOVCNDR, provides financial support to farmers to buy agricultural biologicals for organic farming.

China is the largest Country

- The Asia-Pacific region is one of the world's major organic producers. Rice, sugarcane, and fresh fruits and vegetables are among the major organic crops cultivated in the region. China and India are the region's main organic crop producers and have the highest organic product consumption markets.

- The area of the region that was organically farmed increased significantly over the historical period (2017-2022), rising from 3.1 million hectares in 2017 to 3.8 million hectares in 2022. The region's biologicals market increased by 10.1% during the historical period and is expected to increase by about 65.1% over the forecast period, reaching USD 13.6 billion by the end of the forecast period.

- As an individual country, China dominated the Asia-Pacific agricultural biologicals market in 2022 by 75.6% of the market value and 80.7% of the market volume. India occupied second place with 16.9%, the Rest of Asia-Pacific held 3.3%, and Indonesia held 1.5% of the total Asia-Pacific biologicals market values the same year.

- In 2022, row crops in the Asia-Pacific region consumed more biological fertilizers, accounting for 80.3% of the total market value. This is due to the region's huge area under cultivation of field crops, as they are the staple food in many countries in the region. This is followed by cash crops and horticultural crops, which had 11.0% and 8.6% shares, respectively, in the same year.

- The rising trend in organic crop areas and the rising demand for organic products and organic fertilizers reduce overall chemical fertilizer use. The overall cost of crop production and government attempts to encourage organic farming are expected to drive the Asia-Pacific biologicals market during the forecast period.

Asia-Pacific Agricultural Biologicals Industry Overview

The Asia-Pacific Agricultural Biologicals Market is fragmented, with the top five companies occupying 6.30%. The major players in this market are Biolchim SpA, Coromandel International Ltd, Gujarat State Fertilizers & Chemicals Ltd, Indian Farmers Fertiliser Cooperative Limited and Koppert Biological Systems Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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