

Biological Control - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Biological Control Market size is estimated at USD 3.73 billion in 2024, and is expected to reach USD 5.25 billion by 2029, growing at a CAGR of 7.08% during the forecast period (2024-2029).

Key Highlights

- Biological Control methods are environmentally friendly, have no harmful effects on humans compared to synthetic agrochemicals, and are effective throughout the season, therefore making them ideal for pest control. Rising public concern about synthetic pesticide hazards to the human body coupled with growing regulations on synthetic chemicals in farming and subsequent bans on such chemicals across the world drives the biological control market during the coming year.
- Due to their lower cost than pesticides, biological controls are becoming more popular, which is fostering the expansion of the market. The need for it is growing daily because it can replace chemical agents by reducing emissions into the environment, which in turn leads to less soil and water pollution. Further, the increasing area under organic cultivation, less stringent regulations, and increasing need for food security are the major market drivers that are boosting the sales of biologicals. However, the less self-life of the product and low awareness among the farmers are likely to restrain the market growth.
- The developed country like United States is adopting biological control, mainly in case of soil treatment, to strengthen the crop productivity and vigor at an early stage. The rising cost of pesticides, which has, in turn, led to high usage of biological control products.
- The market is still in its initial stages. Increased R&D collaborations, partnerships, and other activities are underway to develop and expand the biological control market, which is expected to grow as consumer preferences shift toward organic food products. For instance, in march 2021, Bayer AG introduced Vynyty citrus, a crop protection product based on biological and pheromones to control pests on citrus farms. The product is currently being used in Spain and is available to growers of citrus and other crops in other Mediterranean countries.

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Biological Control Market Trends

Increasing Organic Farming

Organic farming represents a unique, fast-growing segment of the food industry. The area under organic farming is rapidly growing across the world. According to FiBL statistics, the area under organic cultivation across the world was 72.0 million hectares in 2019, which increased by 4.1% and reached 74.9 million hectares in 2020.

Furthermore, Organic Farming incorporates the use of biological controls as a method to deal with pests rather than using Synthetic Crop Protection Chemicals, therefore Biological Control growth in the market is directly proportional to the increasing organic farming.

Additionally, governments around the world are making efforts for the growth of organic farming and this has led them to make legislative changes that shall boost organic farming in coming years. For instance, in 2021, the EU passed new legislation for an effective legal framework for the organic farming industry. This legislation coupled with increased consumer interest in organic products will drive the growth of the biological controls market during the forecast period. Similarly, innovations in the area of biological control products, coupled with a growing consumer awareness about the negative impact of synthetic pesticides, are expected to boost the adoption rate of biological controls shortly.

North America Dominates the Biological Control Market

North America dominates the biological control market. In North America, the United States holds the largest market, with around half of the North American market, owing to the plenty of available arable lands. Rising concerns over organic labeled products and awareness of microbial pesticides efficiency have driven the market in the region. The United States, with its highly evolved agricultural sector, has been adapting to the natural and organic way of farming lately. Therefore, biological control product consumption is a growing trend there. The increasing cost of chemical inputs, their adverse effect on soil mass and the environment, and the increasing awareness regarding balanced plant nutrition are the major factors driving the market demand in the country.

One of the main factors influencing the North American market adoption of biological control is the loss of conventional products due to registration or product performance concerns. Research is a major area of concentration for many important companies, including FMC Corporation, Corteva Agriscience, and Marrone Bio Innovations. For instance, in 2021, Botanical Solution Inc. (BSI), US, and Syngenta reached an agreement to commercialize BSI's first product, BotriStop, in Peru and Mexico. BotriStop was formulated as a biofungicides to effectively control Botrytis cinerea in blueberries, vines, and vegetables. The companies would target the fresh food production demand in Peruvian and Mexican markets.

Furthermore, the demand for biological control products in Canada is largely driven by conventional agriculture, recent changes to municipal and provincial laws governing the cosmetic use of pesticides, and legislation and ensuing promotion for lower-risk pest control products. The rise in the cost of pesticides also has, in turn, led to the high usage of biological control products.

Biological Control Industry Overview

The biological control market is a fragmented market with the presence of various small and regional players operating in the market. Some of the notable players in the market include Certis, BASF SE, Marrone Bio Innovations Inc., Bayer CropScience AG, and Valent Biosciences. The major players in the market are mainly focusing on adopting different strategies, such as

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partnerships, expanding operations into new areas, and mergers and acquisitions in order to obtain a stronghold in the market and to bring more revenue share to the overall market.

Additional Benefits:

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

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