

Europe Biocontrol Agents - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2017 - 2029

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Report description:

The Europe Biocontrol Agents Market size is estimated at USD 541.33 million in 2024, and is expected to reach USD 810.85 million by 2029, growing at a CAGR of 8.42% during the forecast period (2024-2029).

Key Highlights

- Macrobiology is the Largest Form : Macrobiology biocontrol agents include mites, insect predators, parasitoids and entomopathogenic nematodes (EPNs). They have the ability to control various pests effectively.
- Macrobiology is the Fastest-growing Form : The European government's goal to reduce the chemical pesticide use by 50% by 2030 driving the demand for the Macrobiology biocontrol agents, which can effectively act on pests.
- Row Crops is the Largest Crop Type : The dominance of the row crops is mainly due to its large cultivation area in the region, which accounts for about 82.3% of the total organic crop area in the region in 2022.
- Russia is the Largest Country : The main consumers of biocontrol agents in the Russian Federation have protected soil enterprises and forestry enterprises, personal part-time farms and open-pit enterprises.

Europe Biocontrol Agents Market Trends

Macrobiology is the largest Form

- Macrobiology biocontrol agents dominate the market, with a value of about USD 458.8 million in 2022. Their dominance is mainly due to their ability to effectively control a wide range of pests without causing harm to the environment.

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- Among macrobial biocontrol agents, predators dominate the market and are valued at USD 399.9 million. The predators' segment's dominance in the overall biocontrol agents market is due to their ability to attack different life stages of pests and even different pest species. They are voracious feeders compared to other biocontrol agents.
- Row crops dominate the macrobial biocontrol agents market, mainly due to their large cultivation area in the region. The consumption value of macrobial biocontrol agents in field crops is anticipated to reach USD 695.2 million by the end of the forecast period.
- The market share of microbial biocontrol agents is limited compared to macrobial biocontrol agents due to various factors such as limited availability, less awareness about the utilization mechanism among farmers, and complex registration and commercialization processes.
- Bacterial biocontrol agents dominated the microbial market and accounted for about 89.0% of its value in 2022. Bacterial biocontrol agents are mainly dominant due to their ability to control various diseases and pests.
- However, integrated pest management programs promote the use of macrobial biocontrol agents such as predators and parasitoids. The European Commission promotes integrated pest management tools that can assist farmers and advisors, which may drive the macrobial biocontrol agents market value during the forecast period.

Russia is the largest Country

- Microorganisms have become an increasingly popular alternative to chemical plant protection products, providing farmers with effective tools to control pests and diseases in their crops while reducing the environmental impact. The European biocontrol agents market witnessed steady growth in 2022 as four legal acts were endorsed by the Member States of the European Commission that simplify the approval and authorization process of microorganism-containing biological plant protection products. The objective is to provide farmers with effective tools to substitute chemical plant protection products and deliver on the objectives of the Farm-to-Fork Strategy.
- Russia currently occupies the largest share in the European biocontrol agents market, with a value share of 55.5% and a volume share of 21.2% in 2022. The increasing cultivation of horticultural crops and the discovery of new pests attacking crops are expected to drive further growth in the Russian market, with a projected CAGR of 8.3%.
- Organic farming is a key industry of the EU agricultural sector, with nearly 330,000 organic farmers in the European Union in 2019, representing up to 20% of the farming area in the Member States. One of the targets of the Farm-to-Fork Strategy is to increase the total farmland under organic farming in the European Union, with plans for at least 25% of the EU's agricultural land to be under organic farming by 2030.
- Biological plant protection products can be used in organic agriculture. The new regulations are expected to make it easier for EU organic farmers to access microorganisms used in biological plant protection products. This will provide them with new sustainable alternatives for controlling plant pests, contributing to a more environmentally friendly and sustainable approach to farming.

Europe Biocontrol Agents Industry Overview

The Europe Biocontrol Agents Market is fragmented, with the top five companies occupying 27.60%. The major players in this market are Biobest Group NV, Bioline AgroSciences Ltd, Bioplanet France, E-NEMA GmbH and Koppert Biological Systems Inc. (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format

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