

**Agricultural Biologicals Market Assessment, By Type [Biofertilizers, Biostimulants, Biopesticides], By Mode of Application [Seed Treatment, Foliar Application, Soil Treatment, Others], By Form [Solid, Liquid], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Region, Opportunities and Forecast, 2017-2031F**

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**Report description:**

Global agricultural biologicals market is projected to witness a CAGR of 14.51% during the forecast period 2024-2031, growing from USD 15.41 billion in 2023 to USD 45.56 billion in 2031. There has been a remarkable expansion in the market as more farmers and agriculture-based industries are opting for greener options for crop protection and enhancement. Agricultural biologicals offer environmentally friendly farming practices that enhance the yield of crops, soil quality, and pest defense with a reduced impact on the environment. Due to their origin from natural raw materials such as plants, microorganisms, and insects, these products are commonly used in organic and residue-free agriculture. Increasing concerns about the side effects of chemical pesticides and fertilizers, along with regulatory pressures, are expected to further curtail the use of synthetic materials, profoundly driving the globalization of bioproducts.

The increasing viability of biological products in the market is supported by technological developments in biological product formulations, such as improved shelf life, increased effectiveness, and integration with usual agricultural practices. In addition, the growing consumer preference for organic products is compelling farmers to adopt biological agricultural practices that are harmless to the environment and people. The market is further expanding due to growing investments in research, which has led to the development of innovative and efficient bioproducts.

Certain challenges, such as the product not performing consistently in different environmental conditions, inadequate awareness among farmers in emerging regions, and high cost compared to chemical alternatives, may limit growth to a certain degree. However, it is apparent that the global agricultural biologicals market is huge, especially considering the encouraging trends that

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include the current transition towards sustainable farming practices, support of biological products by the government, and increasing realization of product benefits in the long term. Hence, the market is expected to grow at a constant rate in the forecast years.

In July 2023, Bionema Group Ltd launched its product line of biostimulants products in the United Kingdom. The new series encompasses seven products that range from seaweed extracts applied to plants and their roots and humic and fulvic acids and other growth enhancers that cater to all stages of plant development.

#### Growing Consumer Preference for Organic and Residue-Free Products Catalyzes Market Expansion

The global agricultural biologicals market is considerably propelled by the increasing inclination of the masses towards the consumption of organic foods. Health and safety concerns and environmental friendliness are key determinants in the purchasing patterns of many consumers. Organic practice, which forbids the use of synthetic chemicals, necessarily depends on biological solutions to achieve healthy and productive crops. The awareness of the health perils posed by the residues of pesticide usage on conventionally cultivated crops, coupled with concerns over the effects of chemical use on soil health and biodiversity in the future, has driven this trend.

In response to this shift, farmers are cultivating organic food and adopting sustainable farming techniques to acknowledge the fact that biological solutions are compatible with organic certification. These solutions help improve crop production and quality. For instance, in November 2023, Yara International ASA launched a biostimulant brand, YaraAmplix. It is a sustainable agriculture solution touching on issues of biodiversity, resource use, prosperity, soil health, and climate. YaraAmplix is an improvement of Yara fertilizers and offers a balanced alternative in crop nutrition.

#### Increased Awareness of Soil Health to Fuel Market Growth

One of the major factors contributing to the growth of the agricultural biologicals market is the growing concern regarding the health status of soils, as agricultural productivity cannot be sustainable without maintaining healthy soils. Using chemical fertilizers and pesticides incessantly has degraded the soil and biodiversity while causing nutrient imbalance, which has necessitated a move towards better farming practices. Biologicals for agriculture provide natural alternatives to the enhancement of soil structure and availability of nutrients, in addition to supporting the growth of beneficial microorganisms vital for plant growth. This increases the productivity of crops and aids in the replenishment of soils over time.

With the increasing focus on regenerative agriculture and sustainable farming methods, there is a growing appreciation for biological inputs, as they promote soil health and decrease chemical reliance. In addition, educational campaigns and government programs emphasize the importance of conserving soil, hence promoting the use of biological products among farmers. As consciousness grows, the need for agricultural biologicals is anticipated to increase, thereby promoting healthier and more productive farming systems.

In July 2024, Rovensa Next launched Wiibio, a biofertilizer enriched with rhizobacteria, in an attempt to enrich the soils and enhance plant growth. Soil health and its ability to support the natural cycle of plant growth are effectively enhanced by this product, which makes it easier for producers to keep the plant growth cycle stimulated.

#### Fruits and Vegetables Hold the Dominant Market Share Among all Crops

The agricultural biologicals market revolves primarily around the growth of crops, especially fruits and vegetables, due to their high worth and susceptibility to disease, pests, and lack of nutrients. Fruits and vegetable cultivators are increasingly inclined to use bioproducts as they seek to protect their crops from plant pests and diseases while producing non-pesticide residue food for consumers. These crops are usually grown together in high volume and density, highly susceptible to pest invasion and soil nutrient depletion, thereby aggravating the need for safe and effective management practices.

Fruits and vegetables are grown in shorter periods and tend to deteriorate faster, thereby necessitating the utilization of bioproducts to sustain yield and quality. The high prices of these crops enable the cultivators to use more advanced biological systems aimed at creating more products in a sustainable way. As people become more health conscious and prefer food grown naturally, the demand for biologicals in this field is expected to remain high.

In December 2023, FytoSol was introduced by Biobest Group NV, which mitigates Cladosporium in Moroccan tomatoes. FytoSol is an oligosaccharide complex made up of two components, chitosan oligosaccharides, and oligogalacturonic acid, and it serves as a double emergency signal to tomato plant receptors.

North America to Dominate the Global Market Share

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North America is expected to remain at the forefront of the global agricultural biologicals market share. It can be attributed to the advanced agricultural system in the region, strong regulatory adherence, and high knowledge of sustainable farming practices. The United States and Canada, as major contributors, have faced a growing reliance on environmentally conscious alternatives due to threats of degradation of the ecosystem and harmful effects of artificial agricultural chemicals. The region's vast agricultural practices and developed organic food market have led to high consumption of biological products. Moreover, there have been technological improvements, active research and development, and a number of leading producers of biological products in the region, further cementing the position of North America in the market. Farmers use biological solutions to grow more crops, improve soil quality, and satisfy consumers who demand organic and clean produce without any residues. Capitalizing on the trend, in February 2024, SureSource Agronomy, located in Ontario, Canada, presented a new series of bio-based fertilizer products for agricultural uses based on cricket excrement, exoskeletons, and leftover feed. In contrast with carbon sources containing soil enhancers and fertilizers, this product enables users to accomplish the same goals with remarkably lower treatment dosages.

Future Market Scenario (2024 - 2031F)

□□The market for agricultural biologicals is expected to see a constant expansion as there is a growing trend amongst farmers to adopt biological solutions in place of harsh chemicals.

□□The advancement in formulation technologies will improve the effectiveness and shelf stability of biological products, hence making them more competitive than chemical products.

□□It is expected that governments globally will implement many friendly policies and incentives, enhancing the usage of agricultural biologicals.

Key Players Landscape and Outlook

The global agricultural biologicals market is characterized by a diverse landscape of key players focusing on innovation and sustainability. Many companies are investing in R&D to enhance product efficacy and broaden their portfolio. Partnerships and acquisitions with agrochemical companies are common, allowing for expanded distribution networks and technological advancements. In March 2024, Certis USA L.L.C. acquired the fungicides Howler and Theia from AgBiome, Inc., besides other multiple assets. The acquisition was aimed at enhancing the portfolio and bringing innovative solutions to agriculture.

The outlook is positive, with projections indicating robust growth due to rising awareness about the benefits of biological products, ongoing technological innovations, and demand for residue-free crops. However, challenges such as inconsistent product performance and high production costs need to be addressed. Overall, the agricultural biologicals market is poised for continued expansion, supported by regulatory incentives, increasing consumer demand for organic products, and ongoing advancements in formulation and application technologies.

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