Biofungicides - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 280 pages | Mordor Intelligence

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Report description:

The Biofungicides Market size is estimated at 3.18 billion USD in 2025, and is expected to reach 5.34 billion USD by 2030, growing at a CAGR of 10.89% during the forecast period (2025-2030).

- The global biofungicides market in 2022 was primarily driven by the production of row crops, with the main crops being barley, corn, wheat, rapeseed, rye, sunflower, soybean, and rice. These crops accounted for approximately 84.1% of the global biofungicides market in terms of value. North America dominates this segment of the market, with the United States being the leading country, accounting for 71.4% of the total market value. The consumption of biofungicides in row crops is expected to continue to grow due to the considerable extent of area under the cultivation of these crops in the United States.
- Horticultural crops, including fruits and vegetables such as bananas, apples, grapes, tomatoes, onions, cucumbers, and cabbages, accounted for 12.3% of the global biofungicides market in 2022. The European region dominates this sub-segment of the market, accounting for a share of 68.4%. Italy, France, and Spain are the leading countries in this region, with Italy accounting for a share of 39.7%.
- Cash crops, including coffee, tea, cocoa, cotton, tobacco, rubber, and sugarcane, accounted for 4.0% of the total global consumption of biofungicides in 2022. The European region dominates this sub-segment of the market, accounting for a share of 42.1%. France, Germany, and Italy are the leading countries in this region, with France accounting for a share of 34.2%.
- The increased demand for organically produced fruits and vegetables, driven by health concerns, is expected to further boost the consumption of biofungicides in the crop segment of the market between 2023 and 2029.

- In agriculture, Bacillus, Trichoderma, Streptomyces, and Pseudomonas are the most commonly utilized microorganisms as bio fungicides. They have proven effective against pathogens such as Pythium, Rhizoctonia, Fusarium, Sclerotinia, Thielaviopsis, Botrytis, and powdery mildew.
- Europe is the largest market for biofungicides, accounting for a share of 41.1% in terms of value in 2022. France is the European Union's leading agricultural producer. Wheat, rye, barley, corn, sugar beet, and oats are among the major crops grown in the country. France accounted for a share of 27.5% of the European biofungicides market in terms of value in 2022. The high share percentage was primarily due to the country's extensive area under organic cultivation, accounting for 17.4% of the total organic area in the region in 2022.
- North America is the second-largest consumer of biofungicides; it accounted for a share of 37.7% in 2022, valued at USD 826.8 million, which is expected to reach USD 1.76 billion by 2029. Government initiatives in North American countries like the United States, such as the Organic Certificate cost-share program, providing financial assistance to establish a cost-share buffer zone, and low-interest loans for organic farmers, help accelerate the use of biofungicides. The biofungicides market is anticipated to register a CAGR of 11.5% between 2023 and 2029.
- The multiple modes of action and the role of a few biofungicides in both biocontrol and stimulating plant growth are expected to drive the market for biofungicides globally. The market is estimated to register a CAGR of 10.8% between 2023 and 2029.

Global Biofungicides Market Trends

Organic production is at an all-time high in North America and Europe, due to the increasing awareness and Government initiatives.

- Organic agriculture has emerged as a significant contributor to sustainable food systems, with 187 countries practicing it globally. As of 2021, there was 72.3 million ha of organic agricultural land worldwide, with an average increase of 2.9% across all regions from 2018 to 2021. Organic arable land accounted for 14.4 million ha, representing 19.9% of the total organic agricultural land.
- The strongest markets for organic farming are North America and Europe, accounting for 41.0% of the global organic arable land. In 2022, Europe had 6.5 million ha of organic arable land, equivalent to 44.1% of the overall organic arable agricultural area. The most significant crops grown organically in North America and Europe are apples, strawberries, cereals, and olives.
- Developing countries in Asia-Pacific are also joining the organic agriculture movement and becoming self-sufficient in producing and providing fresh organic produce to meet their domestic demand. The trend of organic farming is gaining momentum in Asia-Pacific, with the region recording an 18.8% increase in organic arable land from 2017 to 2022. The major initiatives by governments in the region also play a vital role in the growing trend of organic farming. For example, Japan's Basic Plan for Food, Agriculture, and Rural Areas aims to triple the number of organic farmers and lands by 2030.
- The growth of organic agriculture is driven by the rising awareness of the benefits of organic farming, such as promoting soil health, reducing environmental impacts, and producing healthier food.

Per capita spending of organic food majorly observed in United States and Germany, attributed to the consumer demand for healthier and sustainable food

- The organic food market experienced significant growth in the past few years, with global sales reaching USD 120.6 billion in 2020, up from USD 70.8 billion in 2012. The trend toward organic food is being driven by several factors, such as increasing consumer demand for healthier, more sustainable food options and a growing awareness of the environmental impact of conventional agriculture. The global organic food market is expected to continue its growth trend over the coming years.
- According to a survey conducted by the Organic Trade Association in 2021, sales of organic fruits and vegetables increased by around 4.5% in the same year, accounting for 15% of the overall organic sales. North America dominates the market in terms of average spending on organic products, with per capita spending in the United States reaching USD 186.7 in 2021, the highest among all North American countries. Europe is also expected to experience significant growth in the organic food market, with Germany accounting for the highest per capita spending of USD 75.6 in 2021.
- While the organic food market is still dominated by developed countries with high consumer disposable incomes, it is also expected to grow in developing nations. For example, the increasing number of working-class people in the Asia-Pacific region may contribute to the market's expansion due to the growing availability and affordability of organic food products.

Biofungicides Industry Overview

The Biofungicides Market is fragmented, with the top five companies occupying 1.40%. The major players in this market are Bioworks Inc., Corteva Agriscience, Koppert Biological Systems Inc., Marrone Bio Innovations Inc. and Seipasa SA (sorted alphabetically).

Additional Benefits:

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

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