

Brazil Biocontrol Agents - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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Report description:

The Brazil Biocontrol Agents Market size is estimated at 57.27 million USD in 2025, and is expected to reach 87.43 million USD by 2030, growing at a CAGR of 8.83% during the forecast period (2025-2030).

- The Brazilian biocontrol agents market was valued at USD 45.8 million in 2022. It accounted for 14.0% of the total South American biocontrol agents market in the same year.
- Macrobial biocontrol agents dominate the Brazilian biocontrol agents market, which was projected to be worth USD 45.8 million in 2022. The dominance of macrobial biocontrol agents is mostly from their capacity to control a wide range of pests.
- Predators dominate the macrobial biocontrol agents market. Their dominance in the overall biocontrol agents market is mostly due to their capacity to attack multiple life stages of pests and even different pest species. They are voracious eaters compared to other biocontrol agents. In 2022, predators accounted for about 97.4% of the macrobial biocontrol agents market.
- In 2022, microbial biocontrol agents accounted for less than 1.0% of the total biocontrol agents market in Brazil. Microbial biocontrol agents have a limited market share due to their complicated mechanism of action and low knowledge among Brazilian farmers. However, because of their capacity to manage a wide range of pests and illnesses, these agents have the potential to grow their market share.
- Fungal biocontrol agents lead the microbial biocontrol market. Fungal biocontrol agents are mostly dominant owing to their capacity to penetrate various types of insects through their cuticles. They are also effective against targeted pests while causing no harm to the environment.
- The market for biocontrol agents is expected to register a CAGR of 8.6% between 2023 and 2029 as farmers search for

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alternatives to chemical pesticides due to pests becoming resistant to chemical insecticides and integrated pest management programs promote the use of biocontrol agents.

Brazil Biocontrol Agents Market Trends

The Country's regulatory laws enabled the expansion of organic cultivation, boosting cash crops cultivation.

- The area under organic cultivation of crops in Brazil was recorded at 13,758.7 hectares in 2021, as per the data provided by FibL Statistics. Organic agriculture in Brazil has grown considerably in the last twenty years, mainly due to the creation of specific laws and regulations.
- Between 2015 and 2017, the annual average growth of newly registered organic producers was 43.0% in Brazil. The Litoral Sul and Baixo Sul ITs, in the country's southern region, had the highest number of registered organic producers in Brazil. From 2018 to 2020, it fell to 4.0%, coinciding with a new political scenario, which was seen as a landmark in the scope of national agriculture, the end of federal departments responsible for agricultural development, and the expansion and flexibilization of the Brazilian pesticide market.
- Cash crops accounted for the maximum share of 86.3% in terms of organic crop cultivation in 2021, spanning 11,871.6 hectares across Brazil, including sugarcane, cocoa, coffee, and cotton. The prevalence of cash crops is followed by horticultural crops, which accounted for a 9.3% share with an organic cultivation area of 1,295.9 hectares in 2021. The primary fruit and vegetable crops grown in the country include oranges, carrots, potatoes, bananas, lemons, tangerines, and strawberries.
- Row crops accounted for 4.4% of Brazil's total organic crop cultivation in 2021, with an area of 591.2 hectares. The organic area under cultivation of row crops increased by 17.1% between 2017 and 2022. The replacement of chemical nitrogen with organic sources in Brazil has been associated with saving around USD 13.0 billion per annum, which is driving more farmers to take up organic farming of row crops.

As health awareness and income rise, people are spending more on organic food, with olive oil being the top choice

- Organic food consumption in Brazil is mainly observed in the higher-income groups due to the higher prices of organic food. However, increasing disposable incomes and the growing health consciousness among consumers post the COVID-19 pandemic are expected to increase the per capita spending on organic food in the country. The current per capita spending on organic food products in Brazil is comparatively lesser than in other parts of the world, with an average per capita spending of USD 0.38 in 2022.
- Brazil ranked 43rd globally for per capita spending on organic packaged food and beverages, with a value of USD 0.38 in 2021. The market is estimated to record a CAGR of 6.6% between the years 2021 and 2026, according to Global Organic Trade data. Olive oil was the most consumed organic food product in the country.
- Growing awareness among consumers and their buying motives will lead to a better understanding of the sustainability attributes of organic food in the country. Increasing per capita income and growing consumer knowledge about the importance of organic food consumption are expected to increase the per capita spending on organic food products in Brazil over the coming years.

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- The retail sales of organic packaged food and beverages in Brazil grew by 9.5% in 2021 to reach a value of USD 81.0 million. This figure is expected to grow further with the penetration of e-commerce within organic packaged food. Additionally, the increasing levels of urbanization and improving consumer living standards have increased the per capita expenditure on high-quality, organic food products in Brazil. The Brazilian Ministry of Agricultural Development is introducing numerous policies for promoting the domestic production of organic foods, which will drive market in the coming years.

Brazil Biocontrol Agents Industry Overview

The Brazil Biocontrol Agents Market is fragmented, with the top five companies occupying 30.45%. The major players in this market are Agrivalle Brasil Industria e Comercio de Produtos Agricolas SA, Koppert Biological Systems Inc., Promip Manejo Integrado de Pragas Ltda, Syngenta Group and Vittia Group (sorted alphabetically).

Additional Benefits:

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

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