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# Europe Agricultural Biologicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

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**Report description:**

The Europe Agricultural Biologicals Market size is estimated at 10.12 billion USD in 2025, and is expected to reach 15.36 billion USD by 2030, growing at a CAGR of 8.69% during the forecast period (2025-2030).

- There are several adverse effects of excessive fertilizer and pesticide use on the ecosystem. Applying nutrients causes air pollution, while nitrous oxide emissions contribute to climate change and leach into water systems. The manufacturing of synthetic fertilizers is responsible for over 40% of the agricultural emissions in the European Union.
- Organic farming aims to develop agricultural systems that use and depend on non-farm inputs far less. Thus, accomplishing the goals of the Farm to Fork and Biodiversity strategies depends heavily on organic agriculture. By 2030, these goals seek to reduce fertilizer consumption by at least 20% and reduce nutrient losses by at least 50% while ensuring that soil fertility does not decline.

- In the crop nutrition segment, France occupies the largest share of 14.4%, valued at USD 847.9 million in 2022. France rose to first place in 2021 as the country experienced the strongest growth in areas dedicated to row crops in six years, amounting to 308,420 hectares, an increase of 150%. Such growth factors are expected to result in increased demand for crop nutrition products such as biofertilizers and biostimulants.
- In the crop protection segment, Italy occupied the third-largest share of 17.3%, valued at USD 364.5 million in 2022. Biopesticides occupied a higher share of 86.0%, valued at about USD 313.5 million in 2022 in the market, followed by biocontrol agents, valued at about USD 51.0 million in the same year.
- The increasing awareness among consumers regarding the harmful impact of synthetic fertilizers has increased the demand for

organic produce at the international and domestic levels. Thus, the market is expected to experience growth in the region between 2023 and 2029.

- The European region is one of the world's largest organic crop producers, and organic product consumption is high in European countries. Germany and France are some of the major organic crop producers in the region, and they have the highest organic product consumption markets.
- Organic farming is a key sector of European agriculture. In 2019, there were almost 330,000 organic farmers in Europe, reaching up to 20% share of the farming area in the Member States. In addition, one of the targets of the Farm to Fork Strategy concerns the increase in the total farmland under organic farming in Europe, with at least 25% of the EU's agricultural land to be under organic farming by 2030. These initiatives may drive the agricultural biologicals market between 2023 and 2029.
- The overall organic area in the region increased from 4.9 million hectares in 2017 to 6.9 million hectares in 2022. With this increasing trend in overall organic crop area, the biologicals market in the region also increased by about 22.9% between 2017 and 2022. It is anticipated to increase by about 63.4% between 2023 and 2029 and reach USD 14.12 billion by the end of 2029.
- As an individual country, Germany significantly contributed to the global market for organic products, with demand for organic goods reaching USD 6.3 billion in 2021, or around 10.0% of the total global demand. Germany dominates the European agricultural biologicals market, and it accounted for 8.0% of the market value in 2022.
- The European Commission schemes or projects to decrease the overall chemical inputs in agriculture and the increase in the organic crop area and demand for organic products are anticipated to drive the market between 2023 and 2029.

Europe Agricultural Biologicals Market Trends

European green deal is majorly contributing for increasing organic cultivation across the region

- European countries are increasingly promoting organic farming, and the amount of land categorized as organic has significantly increased over the last 10 years. In March 2021, the European Commission launched an organic action plan to achieve the European Green Deal target of ensuring that 25% of agricultural land is under organic farming by 2030. Austria, Italy, Spain, and Germany are among the leading countries for organic cultivation in the European region. Italy has 15.0% of its agricultural area under organic farming, which is higher than the EU average of 7.5%.
- In 2021, organic land in the European Union was recorded at 14.7 million hectares. The agricultural production area is divided into three main types of use: arable land crops (mainly cereals, root crops, and fresh vegetables), permanent grassland, and permanent crops. The area of organic arable land was 6.5 million hectares in 2021, the equivalent of 46% of the European Union's total organic agricultural area.
- The organic cultivation area of cereals, oilseeds, protein crops, and pulses in the European Union increased by 32.6% between 2017 and 2021, amounting to more than 1.6 million hectares. With 1.3 million hectares in production, perennial crops accounted for 15% of the organic land in 2020. Olives, grapes, almonds, and citrus fruits are a few examples of crops in this group. Spain, Italy, and Greece are significant growers of organic olive trees, with 197,000, 179,000, and 47,000 hectares, respectively, in recent years. Both olives and grapes are crucial for the European agricultural industry because they can be turned into specialty products that are in demand locally and globally. The increasing organic acreage in the region is expected to strengthen the organic agricultural industry in Europe.

Growing demand and rising the per capita spending on organic products in the region

- European consumers are increasingly purchasing goods made using natural materials and methods. Even though organic food still only makes up a fraction of the European Union's overall agricultural production, it is no longer a niche industry. The European Union represents the second-largest single market for organic goods internationally, with an average per capita spending of USD 74.8 annually. The per capita spending on organic food in Europe has doubled in the last decade. In 2020, Swiss and Danish consumers spent the most on organic food (USD 494.09 and USD 453.90 per capita, respectively).
- Germany is the largest organic food market in Europe and the second largest market in the world after the United States, with a market size of USD 6.3 billion in 2021 and a per capita consumption of USD 75.6, as per Global Organic Trade data. The country accounted for 10.0% of the global organic food demand and is estimated to record a CAGR of 2.7% between 2021 and 2026.
- The organic food market in France witnessed strong growth, with a 12.6% rise in retail sales in 2021. The country's per capita spending on organic food was recorded at USD 88.8 in 2021, as per Global Organic Trade data. In 2018, as recorded by the Agence BIO/Spirit Insight Barometer, 88% of French people declared having consumed organic products. The preservation of health, environment, and animal welfare are the primary justifications for consuming organic foods in France. The organic market has begun to grow in several other nations, including Spain, the Netherlands, and Sweden, with the opening of organic stores. Organic food sales grew during and post the COVID-19 pandemic as consumers began paying more attention to health issues and learned the adverse effects of conventionally grown food.

Europe Agricultural Biologicals Industry Overview

The Europe Agricultural Biologicals Market is fragmented, with the top five companies occupying 2.19%. The major players in this market are Agronutrition, Biolchim SpA, Koppert Biological Systems Inc., Symborg Inc. and Trade Corporation International (sorted alphabetically).

Additional Benefits:

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

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