

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

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Report description:

The Europe Biopesticides Market size is estimated at 2.17 billion USD in 2025, and is expected to reach 3.53 billion USD by 2030, growing at a CAGR of 10.22% during the forecast period (2025-2030).

- Biopesticides are naturally occurring substances or agents derived from animals, plants, insects, and microorganisms, including bacteria and fungi, which are used to manage agricultural pests and infections. In 2022, the European biopesticides market accounted for about 77.9% of the global crop protection market by value.
- The European biopesticides market value increased by about 31.2%, between 2017 and 2022. The market value is anticipated to increase by about 77.9% and reach USD 3.20 billion by the end of the forecast period. While the prevalence of chemical or synthetic pesticides in crop protection is continuing, human and animal health concerns are playing key roles in driving the growth of biopesticides.
- The biopesticides market is dominated by field crops, which accounted for a 78.6% share, valued at about USD 1.29 billion in 2022. The dominance of field crops is mainly due to its large cultivation area in the region, which accounted for about 81.2% of the total organic crop cultivation area in 2022.
- Biofungicides dominate the European biopesticides market. The segment held a market share of 59.3% in 2022, valued at USD 971.3 million.
- The European Green Deal set the challenging goal of reducing the use and risk of chemical pesticides by 50% in 2030. IPM strategies are likely to be used, which are based on a holistic view of agroecosystems, with the goal of developing pest- and disease-resistant cropping systems that primarily employ non-chemical pest management measures. They also promote

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Integrated Pest Management (IPM) tools, which assist farmers in finding the required solutions. Such factors and the growing trend of farmers transitioning to organic agriculture are expected to drive the European biopesticides market between 2023 and 2029

- The European biopesticides market may grow in the coming years, owing to a shift toward sustainable agricultural practices and increasing demand for organic products. France dominated the market with a 19.1% share in 2022, as French farmers used biopesticides to reduce reliance on chemical inputs in agriculture, aligning with the country's public policy objectives.
- Italy is the second-largest market for biopesticides in Europe. It is projected to grow by 75.2%, with a CAGR of 9.8% between 2023 and 2029. Recently, the European Commission has endorsed four legal acts that simplify the approval and authorization process of biological plant protection products containing microorganisms, which are expected to provide farmers with tools to substitute chemical plant protection products and support the objectives of the Farm-to-Fork Strategy.
- Organic farming is a key sector of EU agriculture, with almost 330,000 organic farmers in the European Union in 2019 and a 20% share of the farming area in the Member States. The Farm-to-Fork Strategy aims to increase the total farmland under organic farming in the European Union to at least 25% by 2030, providing opportunities for sustainable alternatives to control plant pests.
- The rising product launches and government support for the use of biopesticides are expected to significantly impact the market in the coming years, with the potential for continued growth and innovation in sustainable agricultural solutions. As the market evolves, industry players must keep up with changing consumer preferences and regulatory requirements and invest in R&D to meet the growing demand for sustainable agricultural solutions.

Europe Biopesticides 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.

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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 Biopesticides Industry Overview

The Europe Biopesticides Market is fragmented, with the top five companies occupying 2.67%. The major players in this market are Certis U.S.A. L.L.C., Corteva Agriscience, Koppert Biological Systems Inc., Seipasa, SA and Valent Biosciences LLC (sorted alphabetically).

Additional Benefits:

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

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