

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

Market Report | 2025-04-28 | 238 pages | Mordor Intelligence

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### **Report description:**

The North America Agricultural Biologicals Market size is estimated at 6.28 billion USD in 2025, and is expected to reach 11.05 billion USD by 2030, growing at a CAGR of 11.96% during the forecast period (2025-2030).

- Agricultural biologicals play an important role in sustainable agriculture in North America. By delivering necessary nutrients and managing pests and insects in crops, these products decrease the usage of chemical fertilizers and pesticides. The regional agricultural biologicals market grew by 63.1% between 2017 and 2022.
- Crop nutrition biologicals dominate the biologicals market, and among crop nutrients, biofertilizers dominated the crop nutrient segment in 2022. Biofertilizers are organic substances containing live microorganisms that help plants thrive. From 2017 to 2021, the biofertilizer market value rose by approximately 49.3%. Rhizobium-based biofertilizers lead the North American biofertilizer industry, accounting for approximately 36.5% of the biofertilizer market value in 2022. This is mostly owing to the potential of rhizobium-based biofertilizers to reduce overall reliance on inorganic nitrogen fertilizers.
- Crop protection is dominated by biopesticides, which account for 94.1% of the crop protection category. The market for biofungicides in North America was valued at USD 891.2 million in 2022, making them the most popular biopesticide type with a 46.9% market share in the same year. Biofungicides are substances that are applied to plants to prevent diseases caused by pathogenic fungi. Bacillus, Trichoderma, and Pseudomonas are the most widely available biofungicides on the market.
- The demand for organic products has grown both domestically and internationally as a result of consumers' growing awareness of the negative effects of synthetic fertilizers. The market grew by 95.1%, with a CAGR of 11.8% between 2023 and 2029.

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- The United States dominated the North American biologicals market with a market share of 55.5% in 2022. Crop protection led the agricultural biologicals market in the United States and accounted for USD 1.35 billion. Biopesticides are the most consumed biological crop protection segment in the United States and accounted for 83.5% of the crop protection segment in 2022.
- Biofungicides dominate the biopesticide segment and are used to control plant diseases caused by pathogenic fungi. Biofungicides may be of microbial or botanical origin. The market for these biofungicides was valued at USD 650.9 million in 2022 and was the most consumed type of biopesticide, with a market share of 49.5% in the same year.
- Canada accounted for 28.8% of the North American agricultural biologicals market in 2022, with a market value of USD 1.27 billion. The crop protection segment in the country was valued at about USD 475.1 million in 2022. Biopesticides dominated the crop protection segment in the country, accounting for 95.2% of the crop protection market value in the same year.
- Mexico is the second-largest country in terms of organic crop area in the North American region. The total organic crop area in the country increased from 512.7 thousand hectares in 2017 to 541.5 thousand hectares in 2022 and is anticipated to increase by 10.9% by the end of 2029. This increasing trend in organic crop areas directly increases the demand for biologicals in the forecast period.
- The increasing demand for sustainable or organically cultivated crops and the adverse effects of the overuse of chemical fertilizers are factors driving the market for biologicals. Additionally, biologicals have the ability to reduce the overall cost of production, further contributing to market growth.

#### North America Agricultural Biologicals Market Trends

Organic produce demand grows in major countries like the United States, increasing cultivation area with government support

- According to the data provided by FibL statistics, the area under organic cultivation of crops in North America was 1.5 million hectares in 2021. The total organic area in the region increased by 13.5% between 2017 and 2021. Among the North American countries, the United States is dominant, with 623.0 thousand hectares of agricultural land under organic farming, with California, Maine, and New York being the major states practicing agriculture. Regarding domestic production, the main organic produce was apples (31.1%), strawberries (9.5%), oranges (6.9%), romaine lettuce (6.7%), and potatoes (6.2%). In the case of trade, the most imported products were bananas (53.1%), avocados (7.7%), mangoes (5.8%), blueberries (5.0%), and squash (4.3%), while the most exported were apples (80.0%), pears (14.4%), cherries (4.0%), dried onions (1.5%), and potatoes (0.2%) in 2021.
- Mexico had 531.1 thousand hectares of area under organic farming in 2021. Mexico is among the top 20 organic food producers in the world. Moreover, the major organic food-producing states in the country include Chiapas, Oaxaca, Michoacan, Chihuahua, and Guerrero, which account for 80.0% of the total organic area in the country. Organizations such as the National Association for Organic Agriculture are promoting organic agriculture in the country, which is expected to motivate more farmers to take up organic agriculture.
- Canada's area under organic crop cultivation increased from 400,000 hectares in 2017 to 450,000 hectares in 2021. Row crops occupied the maximum area, with 420,000 hectares in 2021. The Canadian government announced a sum of USD 297,330 in 2021 as an Organic Development Fund to support organic farmers. These initiatives are expected to increase the organic area in the region.

Growing demand for organic produce in domestic and international markets, rise in per capita spending on organic food

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- The average per capita spending on organic food products in North America was recorded as USD 108.0 in 2021. Among the North American countries, the United States had the highest per capita spending, with an average spending of USD 158.0 in 2021.
- The pandemic has been a major factor in the increase of organic food consumption. In 2020, sales of organic products in the United States grew by 14.2%, which represented an increase of USD 1.0 billion, reaching a value of USD 8.50 billion, according to a report by Organic Produce Network and Category Partners.
- In 2021, organic product sales in the United States crossed USD 63.00 billion with a 2.0% increase over the previous year. Organic fruits and vegetables accounted for 15.0% of the total organic product sales with a value of USD 21.0 billion in 2021.
- According to data reported by the Organic Federation of Canada, organic food sales in Canada reached a value of USD 8.10 billion in 2020. Canada is the 6th largest market in the world for organic products, with the supply of organic products failing to keep up with the demand in the country. In 2021, the average spending on organic food per person was USD 142.6. In 2021, Mexico registered a market size of USD 63.0 million for organic products with a global rank of 35, and it is estimated to record a CAGR of 7.2% between 2021 and 2026, according to the Organic Trade Association. However, the per capita spending on organic products in the country is less compared to other countries in the region with a value of USD 0.49 in 2021. It is expected that more players entering the market in Mexico will increase the demand for organic products in the country.

## North America Agricultural Biologicals Industry Overview

The North America Agricultural Biologicals Market is fragmented, with the top five companies occupying 0.75%. The major players in this market are Bioworks Inc., Koppert Biological Systems Inc., Sustane Natural Fertilizer Inc., Symborg Inc. and Valagro USA (sorted alphabetically).

### Additional Benefits:

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

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