

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

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Report description:

The North America Biocontrol Agents Market size is estimated at 146.8 million USD in 2025, and is expected to reach 218.8 million USD by 2030, growing at a CAGR of 8.30% during the forecast period (2025-2030).

- Biological control is a pest management strategy based on the reduction of pest populations by natural enemies or biological control agents. Predators, parasites, bacterial biocontrol agents, fungal biocontrol agents, and entomopathogenic nematodes are the primary biocontrol agents used in crop protection.
- The microbial segment dominated the North American biocontrol agents market in 2022. The fungal biocontrol agents sub-segment dominated and accounted for a 59.7% share of the microbial segment of the North American biocontrol agents market by value in 2022. The dominance of the fungal sub-segment in the biocontrol agents market is mainly because fungal biocontrol agents do not harm the environment with their intricate mode of action and, in most cases, do not lead to the development of resistance in insects, pests, and pathogens.
- The microbial segment is projected to grow at a faster rate due to the increasing use of microbials in various applications, such as seed treatment, on-field, and post-harvest applications.
- The macrobials segment was valued at USD 54.5 million and accounted for 45.8% of the North American biocontrol agents market in 2022. Predators dominated the macrobials segment and accounted for a 97.8% share of the segment by value in 2022. The dominance of the predators' sub-segment in the North American biocontrol agents market is mainly due to their ability to attack different life stages of pests and even different pest species. They are also voracious feeders compared to other biocontrol agents.

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- The North American biocontrol agents market is expected to grow between 2023 and 2029 due to numerous research efforts to improve efficacy and make interactions safer for commercial crops and the environment.

- The North American biocontrol agents market is dominated by the United States, which accounted for 29.0% of the market value in 2022. This dominance is mainly due to the abundance of arable land in the country. Within the United States, microbials are the most popular type of biocontrol agent, accounting for an 89.1% share by value, with fungal biocontrol agents dominating the US market.

- Canada held the second-largest share of the North American biocontrol agents market, accounting for a 19.1% share by value in 2022. The demand for biological control products in Canada is driven by organic agriculture, changes to pesticide laws, and the promotion of lower-risk pest control products. The high cost of pesticides also led to an increase in the usage of biological control products.

- Mexico accounts for the largest share of the North American biocontrol agents market, with a 50.0% share by value and 27.7% by volume in 2022. The country has formalized the role of biological control at the federal and state government levels, and the National Reference Center for Biological Control serves as an international reference center.

- The North American biocontrol agents market is primarily dominated by the United States, with microbial biocontrol agents being the most popular type segment. Canada and Mexico are also significant players in the North American market, with their respective demand drivers and government initiatives. Despite the market's potential for growth, challenges such as the product's shelf life and lack of awareness among farmers may impede progress.

North America Biocontrol Agents Market Trends

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

- The area under organic cultivation of crops in North America was recorded at 1.5 million hectares in 2021, according to the data provided by FibL statistics. The organic area in the region increased by 13.5% during the historical period (2017-2022). Among the North American countries, the United States was dominant, with 623.0 thousand hectares of agricultural land under organic farming, with California, Maine, and New York being the major states practicing agriculture.

- The United States is followed by Mexico, with 531.1 thousand hectares of area under organic farming in 2021. Mexico is among the top 20 organic food producers in the world. Mexico is the largest exporter of organic coffee in the world, according to Global Coffee Masters data. The country has the largest area under organic coffee production and even in terms of the number of organic coffee producers in the country.

- The major organic food-producing states in the country include Chiapas, Oaxaca, Michoacan, Chihuahua, and Guerrero, which accounted for 80.0% of the total organic area in the country in 2021. Organizations such as National Association for Organic Agriculture promote organic agriculture in the country, which is expected to motivate more farmers to take up organic agriculture. In addition to financial assistance, the Mexican government supports research and development activities to help promote organic agriculture.

- Canada's area under organic crop cultivation increased from 0.4 million hectares in 2017 to 0.4 million hectares in 2021. Row crops occupied the maximum area with 0.4 million hectares in 2021. The Canadian government announced a sum of USD 297,330 in 2021 as Organic Development Fund to support organic farmers. These initiatives are expected to increase the organic area in the region.

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

- North America's average per capita spending on organic food products was USD 109.7 in 2021. The per capita spending in the United States is the highest among the North American countries, with average spending of USD 186.7 in 2021. The sales of organic products in the United States crossed USD 63.00 billion in 2021. Organic Trade Association accounted for a 2.0% increase over the previous year, with organic food sales at USD 57.5 billion in 2021. Organic fruits and vegetables accounted for 15.0% of the total organic product sales, valued at USD 21.0 billion in 2021.
- Organic food sales in Canada reached a value of USD 8.10 billion in 2020, as per the data reported by the Organic Federation of Canada. It is reported that 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. The average spending on organic food per person was USD 142.6 in 2021. Increasing government support to retailers is expected to increase the availability, accessibility, and affordability of organic products in the country. Organic Trade Association estimated the organic products market in Canada to grow and register a CAGR of 6.3% between 2021 and 2026.
- In 2021, Mexico registered a market size of USD 63.0 million for organic products with a global rank of 35. It is estimated to grow and register a CAGR of 7.2% between 2021 and 2026. However, the per capita spending on organic products in the country is less than in other countries in the region, with a value of USD 0.49 in 2021. More players entering the market in Mexico are expected to increase the demand for organic products in the country.

North America Biocontrol Agents Industry Overview

The North America Biocontrol Agents Market is fragmented, with the top five companies occupying 15.38%. The major players in this market are Applied Bio-nomics Ltd, Arizona Biological Control Inc., Biobee Ltd, Bioline AgroSciences Ltd and Koppert Biological Systems Inc. (sorted alphabetically).

Additional Benefits:

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

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