

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

Market Report | 2025-04-28 | 221 pages | Mordor Intelligence

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Report description:

The United States Agricultural Biologicals Market size is estimated at 3.55 billion USD in 2025, and is expected to reach 6.48 billion USD by 2030, growing at a CAGR of 12.81% during the forecast period (2025-2030).

- In 2022, crop protection led the US agricultural biologicals market, accounting for USD 1.35 billion. Biopesticides are the most consumed in the US agricultural biologicals market and accounted for a maximum share of 83.5% in the crop protection segment in 2022. Biofungicides dominate the biopesticides segment and are used to control plant diseases that are caused by pathogenic fungi. Biofungicides may be of microbial or botanical origin. The biofungicides sub-segment was valued at USD 650.9 million in 2022, and they are the most consumed biopesticide type, with a market share of 49.5% in the same year.
- The bioinsecticides sub-segment in the United States was valued at USD 403.9 million in 2022, and it accounted for a share of 30.7%. They are the second-most consumed biopesticides.
- Crop nutrients accounted for USD 1.15 billion in the US agricultural biologicals market in 2022. Organic fertilizers were the most consumed in the US agricultural biologicals market in the crop nutrition segment in 2022. Manures are the most consumed organic fertilizer in the United States, accounting for a maximum share of 46.7% in 2022. Manures can be of plant or animal origin, and they are a decomposed form of plant or animal waste like excreta, generally rich in organic matter. Animal or plant waste compost manure, farmyard manure, and green manure are the common types used in agriculture.
- The increasing awareness about the overuse of fertilizers among farmers and the government initiatives to support sustainable agricultural practices and organic farming resulted in a rising demand for crop nutrition-based agricultural biologicals. Therefore, the market is anticipated to increase between 2023 and 2029.

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United States Agricultural Biologicals Market Trends

Increase in organic area, particularly in row crops, due to country's laws and regulations

- Organic agriculture in the United States has increased significantly over the last 20 years, owing mostly to the introduction of particular laws and regulations. In 2021, the area under organic agricultural farming in the United States was 623 thousand hectares.
- California is the nation's top state for agricultural sales overall, and it is also the leader in organic production, with more than 3,000 organic farms. In relative terms, several other states devote a greater share of their farmland to organic farming than California, where organic farms represent only about 4% of the state's agricultural acreage. Instead, the list of top states for organic farms on a relative basis is led by northeastern states, including Maine, New York, and Vermont.
- Row crops dominate organic farming in the nation. In 2021, they accounted for about 71.8% of all organic cropland. The production of cereal crops predominates. The main cereals include maize, wheat, rice, and millet. The consumption of organic products has become popular among US consumers, who increasingly choose to eat organic foods because of their various health benefits.
- An increasing trend was observed in the overall organic horticulture crop cultivation area, from 112.9 thousand hectares in 2017 to 156.1 thousand hectares in 2021. Regarding domestic production in 2021, the top five fruits and vegetables were 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 produce was 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%).

Growing demand for organic produce especially in the fruits and vegetables sector, rise in per capita spending on organic food

- The United States is one of the largest organic product consumers in the world. In 2020, the country's total sales of organic food products accounted for USD 51.6 billion, according to the Nutrition Business Journal (NBJ, 2021). In 2021, the United States had the largest per capita spending on organic products in the North American region, worth USD 158.0.
- Organic fresh fruits and vegetables have been the leading organic food category since the organic food retail industry began. In 2020, retail sales for these organic products were valued at USD 20.0 billion, showing a growing demand for organic produce. The demand for organic fresh fruits and vegetables has steadily risen over the past two decades. Organic food sales are rising due to growing consumer awareness, especially among high-income consumers. The most in-demand organic categories include basic foods like eggs, dairy, fruits, and vegetables.
- Organic food preferences vary by demographic and region. Younger people of age between 18-29 are more likely to seek out organic products (over 50%) compared to older people aged 65 and above. Income and region also play a role, with 42% of those with under USD 30 thousand income and 49% of those with over USD 75.0 thousand seeking organic products.
- The per capita spending on organic products is increasing in the country, and it recorded a CAGR of 5.2% from 2017 to 2021. The growing demand for organic products creates opportunities for US organic producers to tap into high-value markets domestically and abroad. The price premium associated with organic products is one of the major limiting factors for organic food

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consumption for low-level income consumers.

United States Agricultural Biologicals Industry Overview

The United States Agricultural Biologicals Market is fragmented, with the top five companies occupying 6.56%. The major players in this market are Bioworks Inc., Cedar Grove Composting Inc., Certis USA LLC, Corteva Agriscience and Novozymes (sorted alphabetically).

Additional Benefits:

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

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