

Agricultural Biological Control Market Growth, Trends, and Forecast Report

The biological control market in Asia-Pacific is likely to grow at a CAGR of 17.14% and is estimated to be USD 1159.84 million in 2020

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Market Overview

The major drivers behind growth of the [biological control market](#) are the growing demand for food safety and quality, low R&D cost in introducing new biological product in the market as compared to synthetic herbicides, increased regulatory framework of chemical residue limits and adoption of new farming practices. Increase in grower production costs, per-acre profitability for the dealer with huge reductions in overhead for delivery serve to increase interest in [biological control products](#). The bottom line is growers, worldwide, are beginning to understand the true value of plant health and the need to find methods for increasing production at reduced overall costs per unit produced.

Whilst the market for Biological control products is improving from a relatively low base, it is unlikely that the sector will achieve high growth rates, until reproducibility of action in the field can be proven. High cost of biological control products and their low availability, less awareness about organic pesticides & fertilizers and high specificity of biological control products, mainly microbial pesticides toward pests, are the major constraints for the biological control market. The added labour and expense of these applications is often a deterrent, inhibiting the growth of the market for biological control market

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Segmentation by Type

Microbials occupy a share of 73.12% while macrobials occupy a share of 24.38%. entomopathogenic nematode occupy the smallest share of 2.5%. Microbials will be the fastest growing segment in the forecast period with a CAGR of 15.33%. The microbials are broadly segmented into bacteria, virus and fungi with bacteria occupying the largest market share of 44.95%. Many multinational companies are involves in the use of microbes in their products.

The bacteria-based agriculture has a huge demand and is widely used, globally. With increasing



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awareness and support from various agencies for using microbials in agriculture, their share is rapidly increasing. The most commonly used bacteria are Bacillus species such as B.thuringiensis and B subtilis, Rhizobium and others. Bacillus thuringiensis (Bt) is the most-widely used insecticide, globally.

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Segmentation by Application

The fruits and vegetables segment is the fastest growing segment of the [biological control market by crop type](#). The overall market for biocontrol used for fruits and vegetables has will witness a growth of 14.29% CAGR over 2020-2025. Companies trying to capture this niche segment, are actively introducing new products with different ingredients in order to fulfil the nutrient requirements of various fruit and vegetable types. Large scale cereal crop production areas in North America and Europe are the major regions adapting to the application of bio based crop protection products. By crop-based applications, agriculture bio controls used for oilseeds occupy 21% of the market share. The major crops utilizing the biological crop protection products under oilseed segment are majorly soybeans. Soybean holds 70% share in the oilseeds category. Large scale oilseeds crop production areas in North America and Asia pacific are the major regions adapting to the application of microbial products

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Segmentation by Geography

The North American biological control market is growing at a faster rate with a CAGR of 9.91% over 2020-2025. North America is the largest market for biological control and has around 37% of the global market share in 2020. In North America, the United States holds the largest market with around half of the North American market share in 2020. In Europe, Germany and Spain has the largest market share with 25% and 21% respectively. Germany and Spain have the highest growth rate apart from the largest market because of the large arable land. The Nordic countries, on the other hand, consume comparatively small amounts; Denmark, Estonia, Finland, Lithuania, Norway and Sweden combined use just 8% of the total in 2019. Asia-Pacific is third largest market for biological control and holds around 20% of the global market share. In Asia Pacific, China has the largest market share, holding around 42% of the total in 2020

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Competitive Landscape

The results of market share analysis indicate a highly fragmented global market for biological

control. Many small players occupy a major portion of the market, with top players have a diverse and increasing product portfolio. In terms of market share dominance, Certis with 5.4% share is followed by BASF and Valent Biosciences which have market share of around 5.1% and 5% respectively. Marrone Bio Innovations and Bayer stand on the fourth and fifth rank, with market share of 4.5% and 3% respectively. The greater market share of these players can be attributed to highly diversified product portfolio and large number of acquisitions and agreements taking place. These players are also focusing on R&D, large product portfolio, wide geographical presence and aggressive acquisition strategy

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