

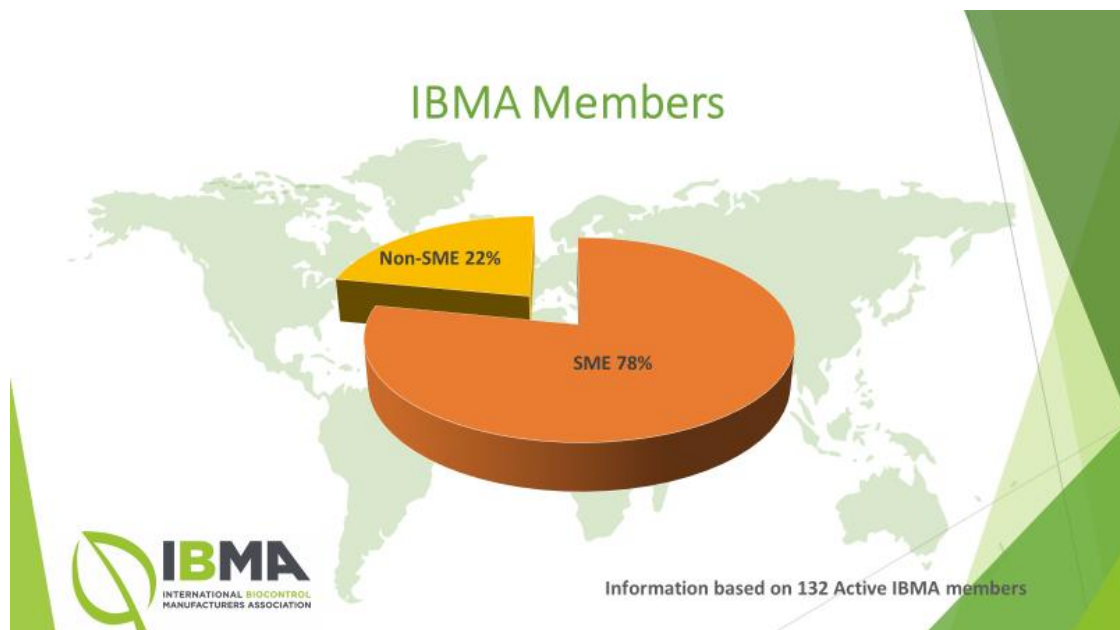
IBMA Biocontrol Survey Report 2013, 2014 and 2015

IBMA commissioned a Market Survey in conjunction with BPIA in 2016 using Phillips McDougall a third party market survey specialist in a black box approach with members to maintain the highest level of confidentiality of data supplied by companies under a confidentiality clause. The data covered the years 2013, 2014 and 2015.

Data Obtained from the Survey

IBMA Membership and SME / Non-SME Status

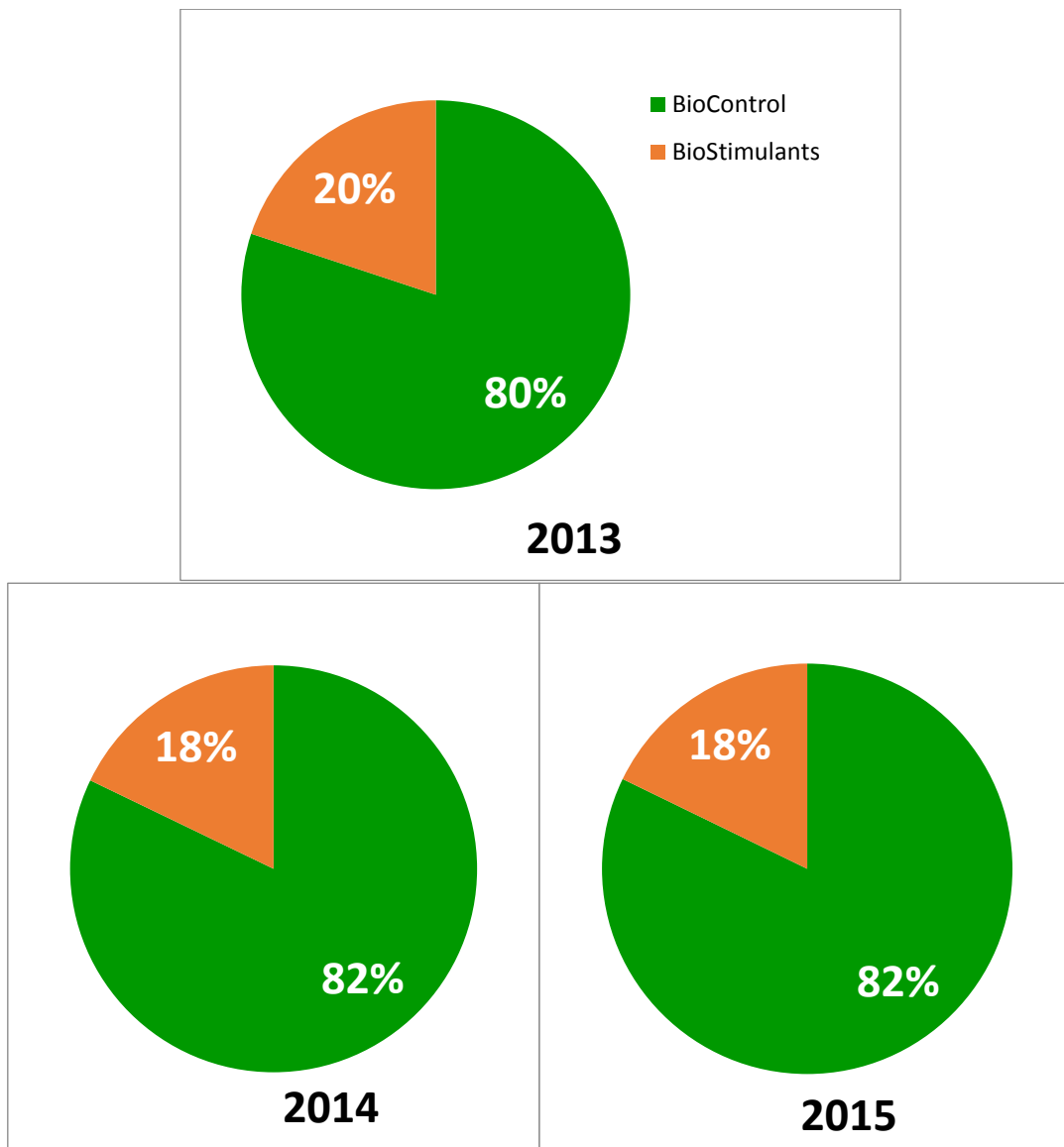
The survey confirmed that IBMA is rich in SME members which can be used to ensure that they in particular and our members and association as a whole are not facing undue burdens. Of our active membership 78% are SMEs and 22% are non-SMEs.



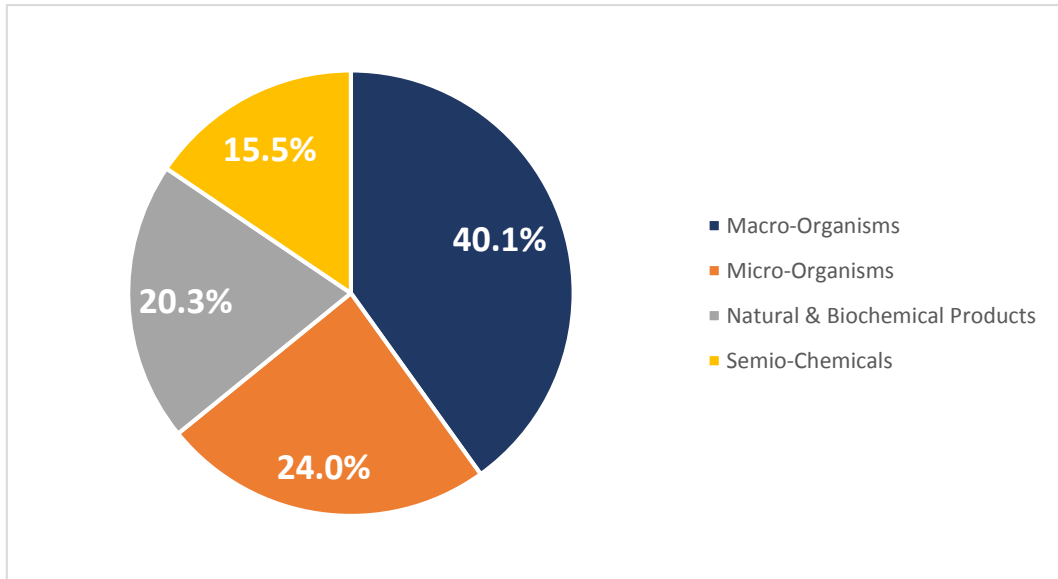
The European Biocontrol Market

The biocontrol and biological inputs markets in Europe are more heterogenous than other markets which rely substantially on microbial biocontrol agents and biostimulants. The European market has diversity of inputs from biocontrol producers covering all sectors: Of the biological inputs market in Europe 81.59% of the market in the survey was biocontrol and 18.41% biostimulants based on the cumulative figures over the three years surveyed. Of the biocontrol market the macrobial sector is the largest and represents 40.10% of the European market, the microbial sector represents 24.04%, the natural and biochemical products 20.32% and the semiochemicals 15.54% of the market over the three years surveyed.

Biocontrol vs. Biostimulants Absolute turnover sales in percentage, per year



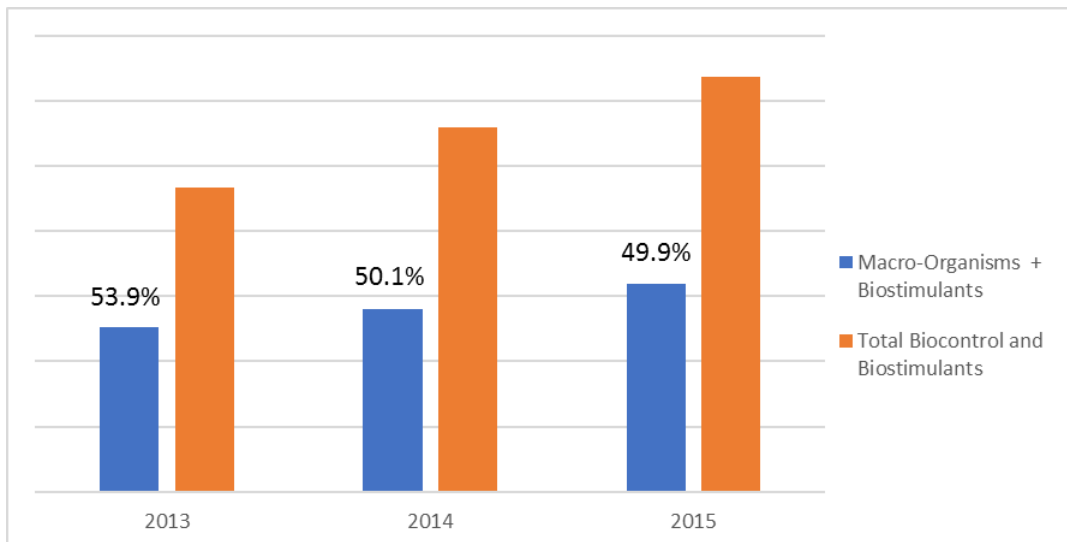
Turnover 2013-2015 aggregated by Biocontrol Products Category



Regulated versus Unregulated markets

Over the period surveyed the non-regulated biological inputs into agriculture, ie. Macroblials and biostimulants have grown at an equal rate and continue to represent a significant part of the market: 2013 – 53.9%, 2014 – 50.1% and 2015 – 49.9% of the total European market. This suggests that regulatory systems and procedures in existence in the EU may be supressing entry of biocontrol products to the market particularly when it is considered that macroblials have largely been restricted to protected agriculture markets.

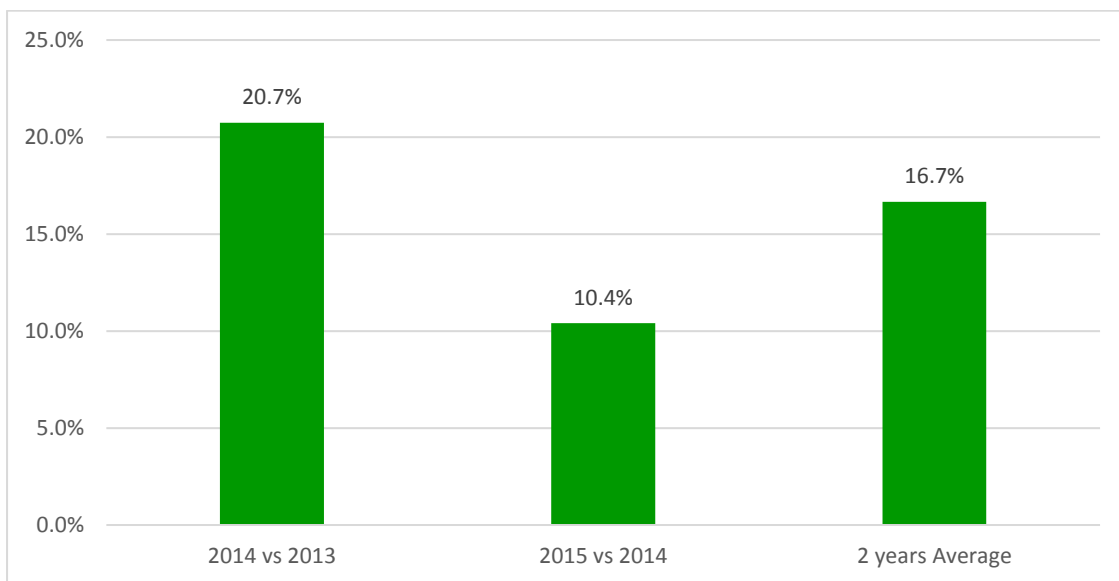
Unregulated (Macro-organisms and Biostimulants) Turnover compared to Total Biocontrol and Biostimulants Turnover, per year (absolute and relative share)



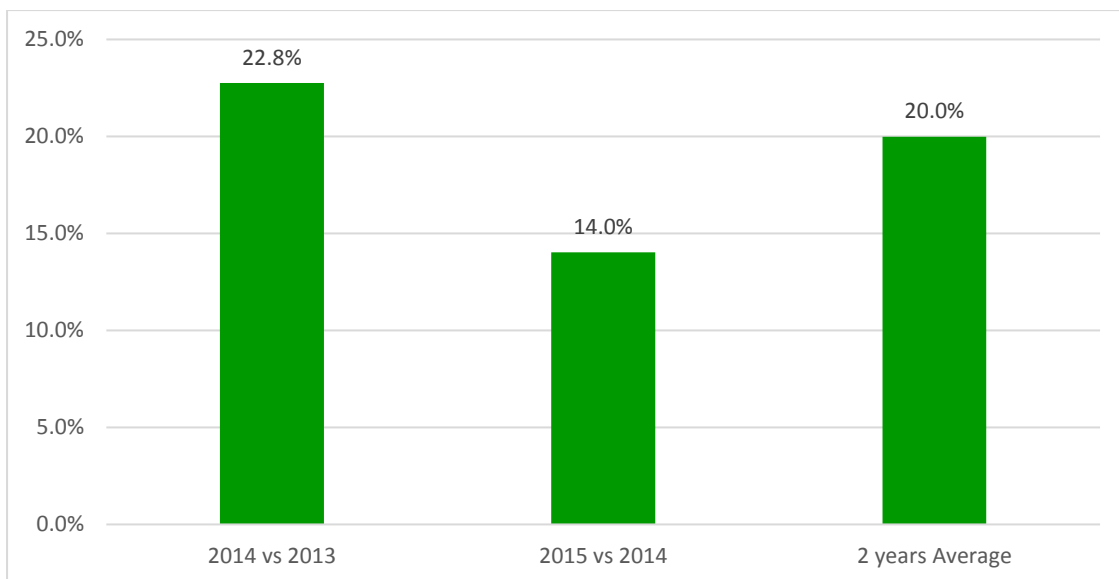
European market in comparison to the Global market

Global growth of the biological inputs industry is at 16.7% per annum and was 20.7% in 2013-14 and 10.4% from 2014-15. Growth in the European market was in line with global growth figures at 16.7% per annum and 20.7% from 2013-14 and 13.95% for 2014-15. Growth in the European biocontrol market was similar with growth figures at 20% per annum and 22.8% from 2013-14 and 14% for 2014-15. Growth across the sectors of our industry in Europe was not even. Natural and biochemical products experienced the biggest growth rate of 40.9% per annum, Microbials 20.9% per annum, Macrobiotics 14.3% per annum, Semiochemicals 11.9% per annum over the three year period. For our members the growth in biostimulants over the same period was 10.91% per annum.

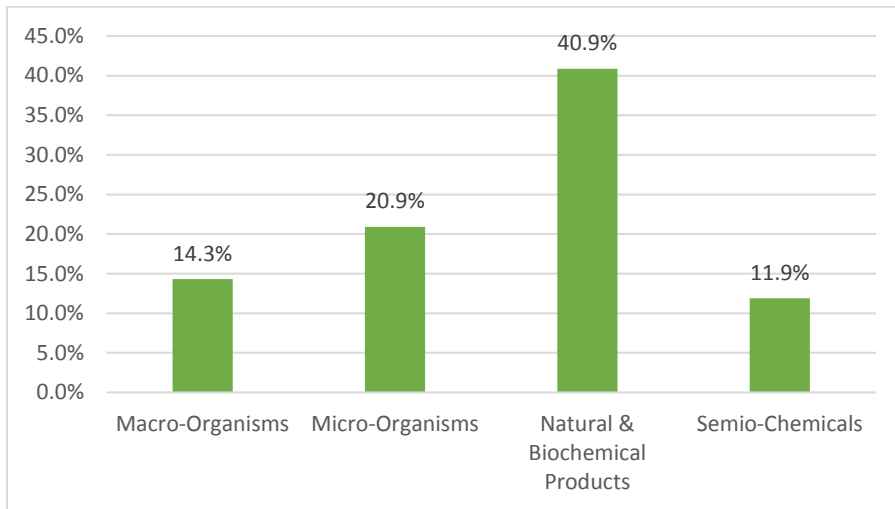
Annual Turnover Growth rate for all Biological inputs Globally



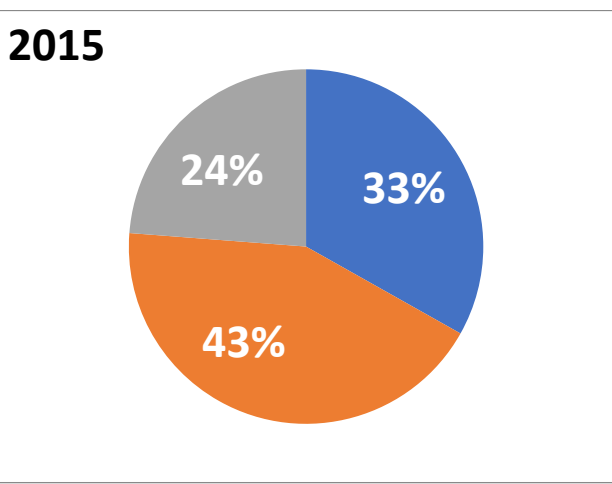
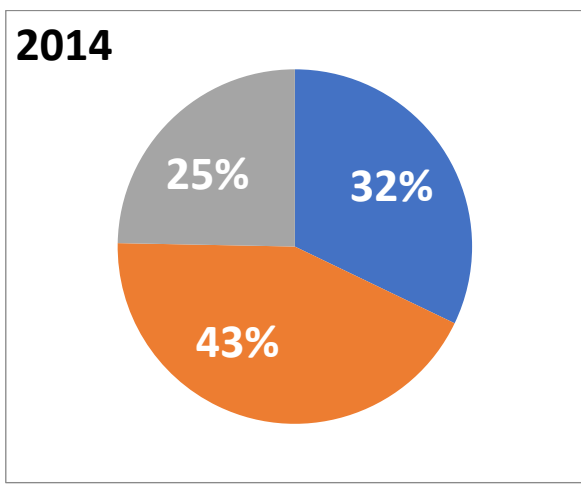
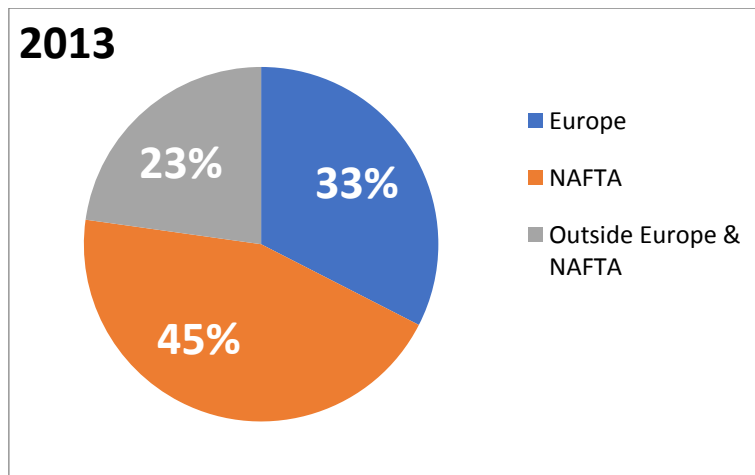
Annual Turnover Growth rate for Biocontrol products in Europe



Average European Turnover Growth rate of Biocontrol products per category, between 2013 and 2015



Consolidated Biological Inputs Market



The survey therefore clearly shows we have a growing business, all sectors are growing at double digit growth rates. The European market is diverse and the sales of biocontrol products reflect the diversity of our membership and the promoted goal of IPM using a multitude of different tools.

David Cary - Executive Director IBMA

18/05/2018