

International biocontrol industry gathers in Switzerland

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ABIM and the IBMA enjoyed a joint celebration in October, with the association acknowledging 20 years in existence and the annual industry meeting having been going for half that time. The IBMA at the time of the conference had 226 member companies of which 158 are active, 64 associate and 4 honorary.

Welcome speeches and contributions to the opening elements of the programme were made by David Cary (Chief Executive), Lucius Tamm (FiBL and ABIM Steering Committee) and Willem Ravensberg of Koppert and IBMA current President. Willem had found the original documents of the founding meeting and the first AGM was held on November 23, 1995 in Brighton, UK. The first IBMA conference and exhibition however took place in 2003 in Bezier France but it was thanks to the efforts and enthusiasm of Martin Andermatt, that with the support of Lucius Tamm, the IBMA concept was formed and following the steering committee approval, a contract was formed with the KKL in Lucerne to host the inaugural event. ABIM has grown over the last ten years, from 247 attendees at the first meeting in Lucerne to 830 at this year's event in Basel. Twenty one original exhibitors has grown to forty seven with a speaker programme almost twice as full as ten years ago and delegates from 52 countries attended.

New to the programme this year, the US company Vestaron, who develop and market bioinsecticides derived from naturally occurring peptides, were presented with the inaugural Bernard Blum Award. Dr Robert Kennedy, Chief Scientific Officer, received the award and gave a brief opening presentation on the products for which the company got the award, a series of bioinsecticides derived from spider peptides with activity on lepidoptera and coleoptera. The Spear product, with the addition of Bt



(*Bacillus thuringiensis*) can improve performance as a part of an integrated pest management system.

A slight tweak to the programme saw Dr. ir. L. P. (Luuk) van Duijn (Director Ctgb) take the lead keynote address slot and he considered sustainable agriculture in Europe, looking at the activities of an EU Member State, the Netherlands, The Green Deal initiative and other activities that NL had planned during their upcoming EU Presidency. In highlighting the need for change, Luuk claimed that agricultural production needs to match a growing world population that places societal demands in an increasingly urbanising world. Manufacturers are taking greater responsibility for their products through stewardship and as represented by ABIM, the industry is innovating towards a greener portfolio. The Netherlands has opted for green growth: an economic growth that takes into account environment and sustainable development. Through its Green Deal approach (<http://bit.ly/1WZIOG6>), the Dutch Government has created space for innovative initiatives from society aimed at accelerating the transition to a sustainable economy. The deal aims to stimulate sustainable growth by collaboration between all stakeholders. To resolve obstacles in the authorisation process and to enable innovation of plant protection products. The Dutch presidency (which will be for the 1st half of 2016) has several possible actions including an acceleration of the approval and authorisation procedures for "low-risk" substances and PPP's; finalizing EU-criteria for low-risk sub-

stances; a promotion of IPM-research and improving IPM-communication by means of an EU-website. In conclusions Luuk stated that there is a need to speed up the approval and authorisation process for lower risk substances and PPP's. A tailor made approach is necessary and a special attention for SME's.

Following a deliberate and well established commercial bias, the seminar programme was delivered over eight sessions covering: Biocontrol – what is the impact; Regulatory Issues; Biocontrol solutions of microbial origins; Biocontrol solutions of natural biochemical product and semiochemicals origin; macrobials; two sessions looking at biocontrol as a business from the perspective of small, medium and large enterprises; concluding with a session on hot biocontrol issues and lessons learned.

Most data cited at ABIM and in general, ignores the markets of China and India. With this consideration, the biocontrol market is still expanding at 12%-17% pa. and by 2020 the value is expected to be in excess of US\$4b and US\$7b by 2025. This is thanks in no small part to countries like Brazil which now has over 100 registered biocontrol products and grew by US\$100m in 2014 alone once BT crops were found to be prone to attack by Corn earworm (*Helicoverpa armigera*). Globally there are over 250 known biopesticide active ingredients used in over 1000 products. According to Bill Dunham's presentation, 98% of Bio Companies are privately held. Approximately 5 Biocontrol Companies have >US\$100m in annual revenue and the majority,(75%) turnover <US\$10m. The market is still seeing acquisition by multinationals and further consolidation can only improve market access and penetration.

The 11th Annual Biocontrol Industry Meeting will take place 24-26 October 2016, at the Congress Center Basel. See www.abim.ch for details where registered participants can have access to the full archive of 10 years of presentations.

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David Cary reported on the association activities and achievements of the past year in which the focus was on creating political support for improvement of registration of low-risk plant protection products. Two aspects are crucial in this respect: getting the criteria for low-risk actives established and developing a fast track approval process.



Willem Ravensberg, IBMA President, said that ABIM retains its place as the important meeting in our calendar. We had the largest number of sponsors, the largest number of exhibitors and the most delegates to ever attend ABIM. This to me reflects how much our industry has grown in the 10 years since ABIM began. It was really impressive to be able to celebrate two big events in one show with IBMA celebrating its 20th birthday coinciding with our 10th ABIM.



Thirteen companies were considered for the Bernard Blum award. The judging panel, headed by Dr. Owen Jones (left) with Dr Robert Kennedy of winners Vesteron (right), were unanimous in support of the 3 shortlisted entries. DCM & De Ceuster (Belgium) was ranked second for a microbials based plant vaccine and Belgium's Biobest third for its 'Flying Doctors' biocontrol delivery service



The keynote address on day one was given by Dr. ir. L. P. (Luuk) van Duijn (Director Ctgb) who replaced Jim Jones (US EPA) who was unable to attend. The Dutch presidency of the EU has several possible actions including an acceleration of the approval and authorisation procedures for "low-risk" substances and PPP's



IBMA executives and post holders past and present raise a glass to conference members in toasting the joint celebration of IBMA (20 years)_ and ABIM (10 years). The specially labelled methuselaha (6L) of wine came by road from Italy from a key grower and supporter of the industry.



Rio Praaning Prawira Adiningrat Managing Partner, PA Europe NV presented results of an 'Elite Opinion Poll' on Low-Risk Pesticides that the PA International Foundation executed at the request of IBMA. 93% of key regulators want the EC to facilitate and accelerate approval of low risk pesticides. 78% want the Commission to inform the public about the lowest possible residues in food.



Norbert Fuchsbauer (left) claimed HiPP Foods consider themselves pioneers of organic agriculture and the world's largest processor of organic materials. Having detailed the "Phosphonate Case", which was a fertiliser widely used in organic farming until 2013 in products such as foliar feeds, it was subsequently registered as pesticides in 2013 by EU but not cleared for use for organic farming. However as it was still contained in certain EU fertilizers, residues could be found in crops treated only with P-fertilizers. Farmers must be able to act in compliance with specifications and producers of PPP and fertilizers have to acknowledge their responsibility for labelling all ingredients of any product to avoid contaminations. All elements of the supply chain in organic (baby) food production have to work together to maintain credibility.

Wynn Grant of Warwick University (right) thought some people felt he was too critical of aspects of IBMA in the RELU programme, but it needed to improve to get the important biocontrol message across - and it has. Great progress has been made but, as always, there is more to do and new challenges ahead. There is now a good organisational platform to meet those challenges. Despite all the engagement and development of guidance the industry is still regulated by a disjointed regulation that is not fit for purpose for the needs of a growing industry. Still insufficient recognition by decision makers and opinion formers of the importance and potential of biocontrol.





Ulf Heilig was first to speak in the regulatory session. There is an increasing awareness and understanding of specificity of biocontrol agents and products by evaluators and regulators thanks to an active participation of IBMA in working groups of international organisations with regulators and evaluators. On the up side, there is improved guidance but the industry is still locked into existing legislative framework for PPPs (in EU). IBMA is recognised and respected as partner by stakeholder NGOs: industry, farmers, and environmentalists. There is a long way to changes in EU PPP legislation and procedures for biocontrol substances and products but we are on the right track!



Wolfgang Reinert of the European Commission, DG Sante considered low risk substances and products and asked – where now? Regulation (EC) No 1107/2009 introduces a new system of approvals, tiered by risk. Low risk products shall be authorised in 120 days (article 47) but member states do not find that feasible. The use of such substances in PPP should be favoured (recital 17) - but “low risk” must not be advertised as a property or used on the label as a claim (article 66).



Jeroen Meeussen is the ‘champion’ for the smaller grower and producer, as he holds the role of Coordinator at the European Union Minor Uses Coordination Facility. Their mission is to enable farmers in the EU to produce high quality crops by filling minor uses gaps through efficient collaboration to improve availability of chemical and non-chemical tools within an integrated pest management (IPM) framework’.



Bill Dunham tapped into his database to provide the conference with the latest market statistics. Perhaps the most surprising was the quote from the UN FAO which states that the world needs to produce more food between 2000 and 2050 than was produced during the previous 10,000 years.



According to Willem Ravensberg, numerous delegates and exhibitors commented on the atmosphere of ABIM 2015 being very positive and with strong networking activities being prime focus across the industry. Expansion of the exhibition space and provision of an overflow area for watching the presentations was received well by almost all. There are 3 new exhibitors and 3 new sponsors who have approached the association to participate in ABIM 2016 based on the success of the 2015 event!

The biocontrol conference had a record attendance in 2015 and a keen audience was present throughout despite the numerous distractions of side meetings, exhibition and poster sessions.





Representing the large biocontrol company, Denis Troalen (Sales and Marketing Director, EMEA, Sumitomo) explained how Sumitomo Chemical was the first mover with regard to development of a combined conventional + Biorational product portfolio when it acquired Valent Biosciences in 2000. Since that time, Pace International, MGK, and Mycorrhizal Applications have been added to the group. The growth strategy is based on commercializing complementary products and technologies to cover from 'at-plant' through to postharvest use.



Ashish Malik, Global Head of Marketing, Bayer Biologicals, stated that targeted spray programs combining chemicals and biologicals improve quality, market access and tradeability of fresh produce. Without any inputs crops would only yield 30% of their potential. Crop protection products double this to 60% and adding crop efficiency products can raise the yield to 100% of the potential. There could be a third green revolution if we can understand better how biologicals interact with plants.



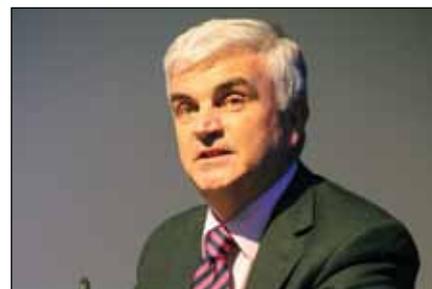
Daniel Zingg of Andermatt Biocontrol, Switzerland concluded that SME's will continue to be an important driver of biocontrol in the future and there are still many opportunities. Andermatt has ambitions to be within the top 3 biocontrol companies, not owned by an agrochemical major. A growth strategy is needed to adapt to changing environment and registration is a key challenge, especially for niche products.



ABIM provides a platform also for the smaller SME's and Matej Stefancic of Trapview presented developments of the Slovenian company's automated insect pest monitoring system which has been presented to the conference before. The company has enlarged the scope of Trapview to tackle moths and now also flies.



From founding grandfather to the third generation of the Koppert family, Rene Koppert made his first delivery at ABIM 2015 recounting the Koppert story. The company started in 1967 with a beneficial mite to control spider mite infestation and nowadays a more holistic or total approach is used in both horticulture and agriculture. Koppert are moving beyond protected crops to tackle pest problems in field crops such as wheat with products such as Panoramix.



Massimo Benuzzi introduced Biogard whose company slogan is 'Biological First'. It is a division of CBC (Europe) which in turn is a subsidiary of CBC Co. Ltd (Tokyo, Japan), who are world leaders in pheromone technologies. Biogard deals only with authorized pheromone, botanical and microbial PPPs. And when considering pheromones he asked the question why semiochemicals were regulated like pesticides when they do not kill any pests?



Roma Gwynn (left) again confirmed her view that we are moving to an era of biology and that technology transfer, getting the knowledge to the farmer, is still key. The biopesticide industry is knowledge intensive and there is a risk that as a business grows from SME to multinational, knowledge can be diluted to the detriment of the technology.

Lieselot van der Veken, Biobest (right), considered the challenges of controlling aphids with macrobials. Early detection and a combination of IBCAs are key to effective control.

