



# IBMA MARKET SURVEY 2020

Data based on 182 companies sales in 2018 season market survey conducted by Independent Business Resources Ltd.



# IBMA Market Survey Summary



Total market size is based on survey of 182 IBMA members sales in 2018 growing season

All graphical data is based on analysis of a subset of the data comprising 38% of members representing 49% of market value

## 01

### Biocontrol Market Size 1.015 bn €

In 2018, the European Biocontrol Market was 1.015bn €, representing approximately 6% of the 16bn € crop protection market.

## 02

### Detailed analysis of 50% of market

A more detailed analysis was conducted on 38% of these members representing 480M (approximately 50%) of sales in Europe and a further 280M in the rest of the world.

## 03

### SMEs predominate the market

SMEs predominate the industry with approximately 50% (239M €) of the sales within the subset members being from SMEs.

## 04

### Spectacular Growth between 2016 and 2018

Between 2016 and 2018 sales in the 38% of the industry sampled, showed invertebrate biocontrol agents increased by 34%, while microbials and semiochemicals almost doubled and natural substances increased nearly three-fold.

## 05

### Greater than 1000 biocontrol products available across European Members states

Biocontrol product availability showed over 1000 products are available across different European member states and that 86% of these are produced by SMEs..

## 06

### Extensive Innovation and Investment by biocontrol industry

In spring 2020 the pipeline showed over 140 products in the authorisation process across Europe and a further 120 products not yet submitted to the authorisation process. Active ingredient submissions by members are also numerous..

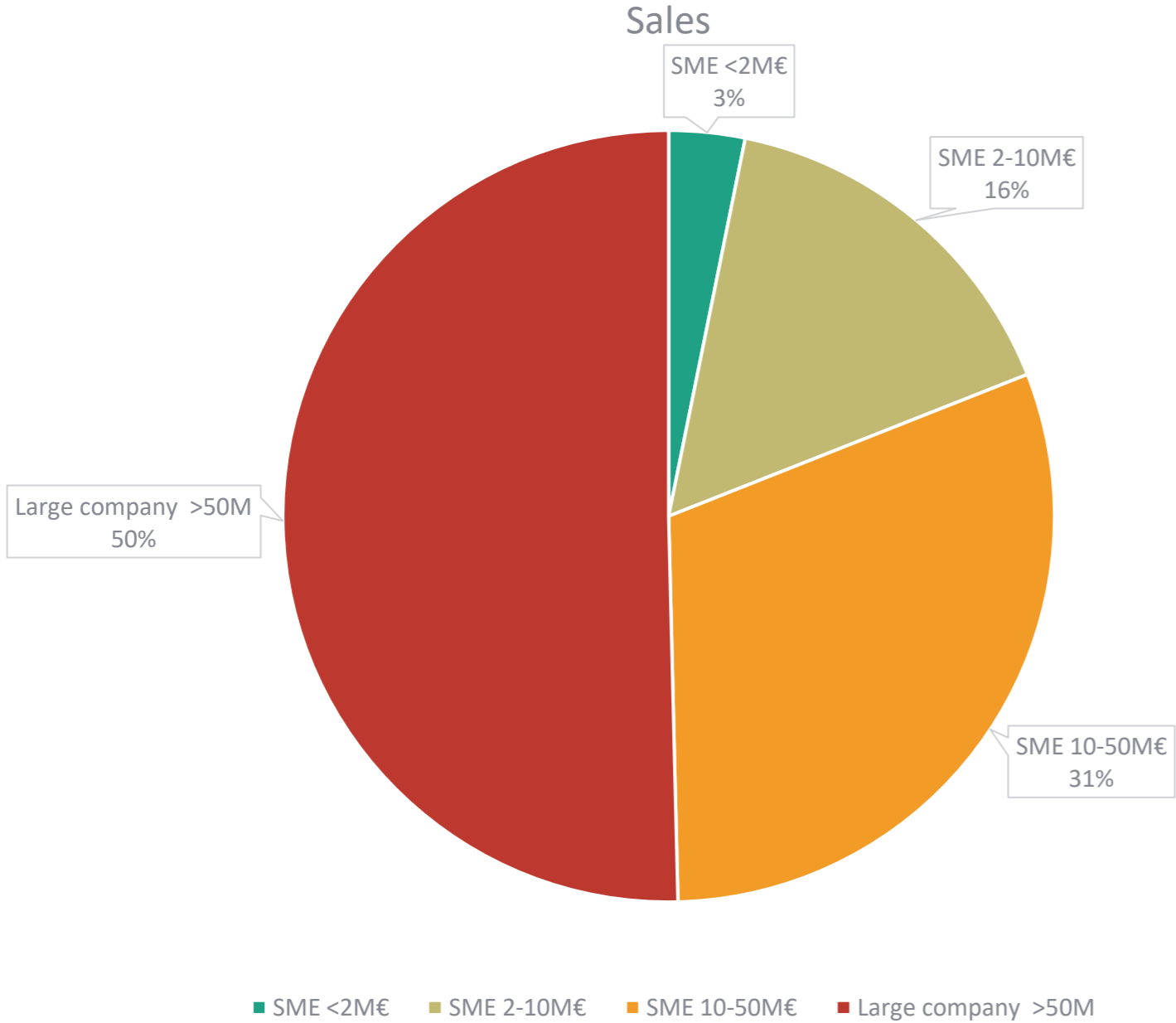
# Total European Biocontrol Market Size 1.015 bn €



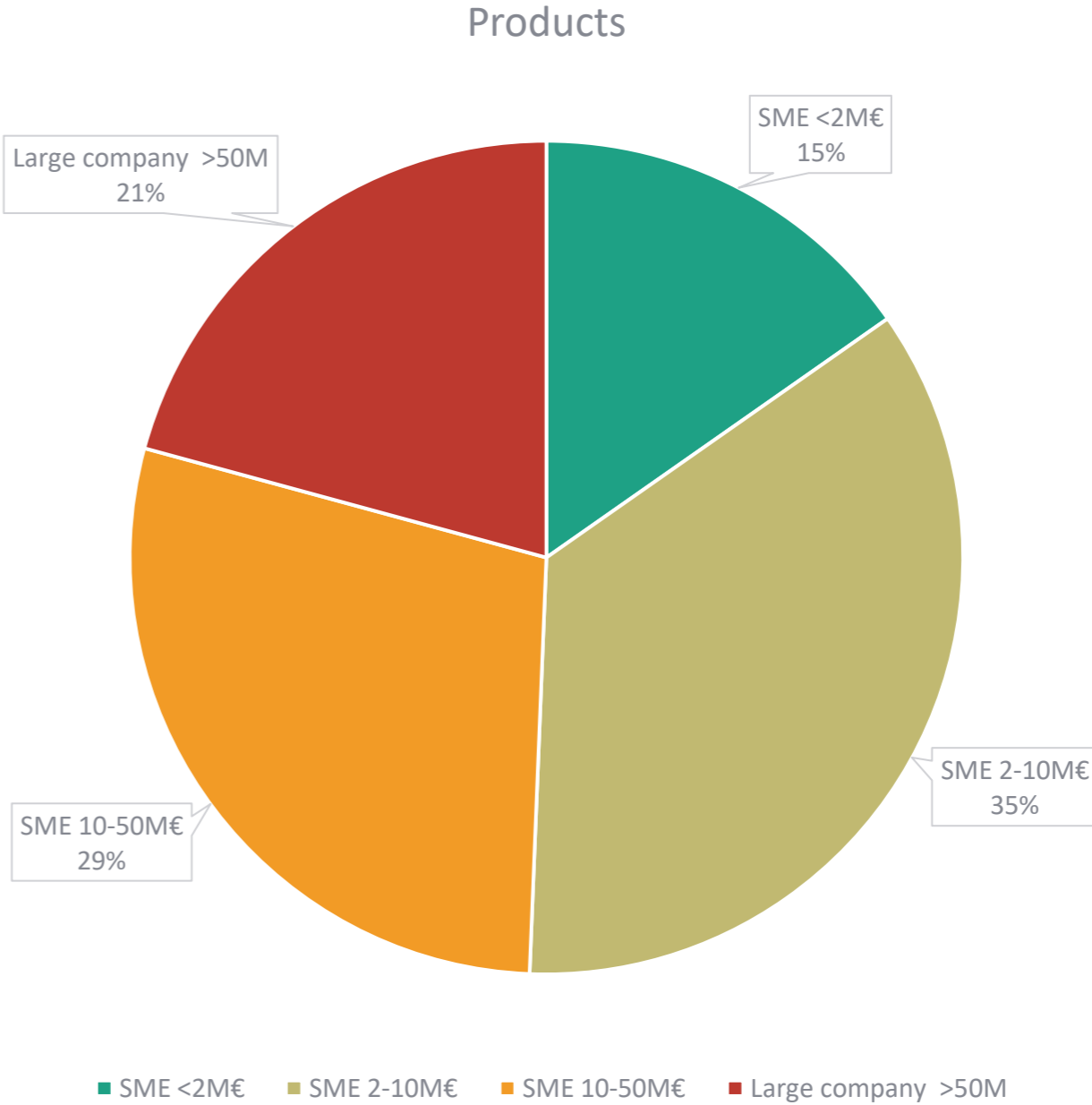
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50% of sales value is created by SMEs



80% of Biocontrol Products sold by SMEs (all categories Invertebrate biocontrol agents, microbials, semiochemicals and natural substances)

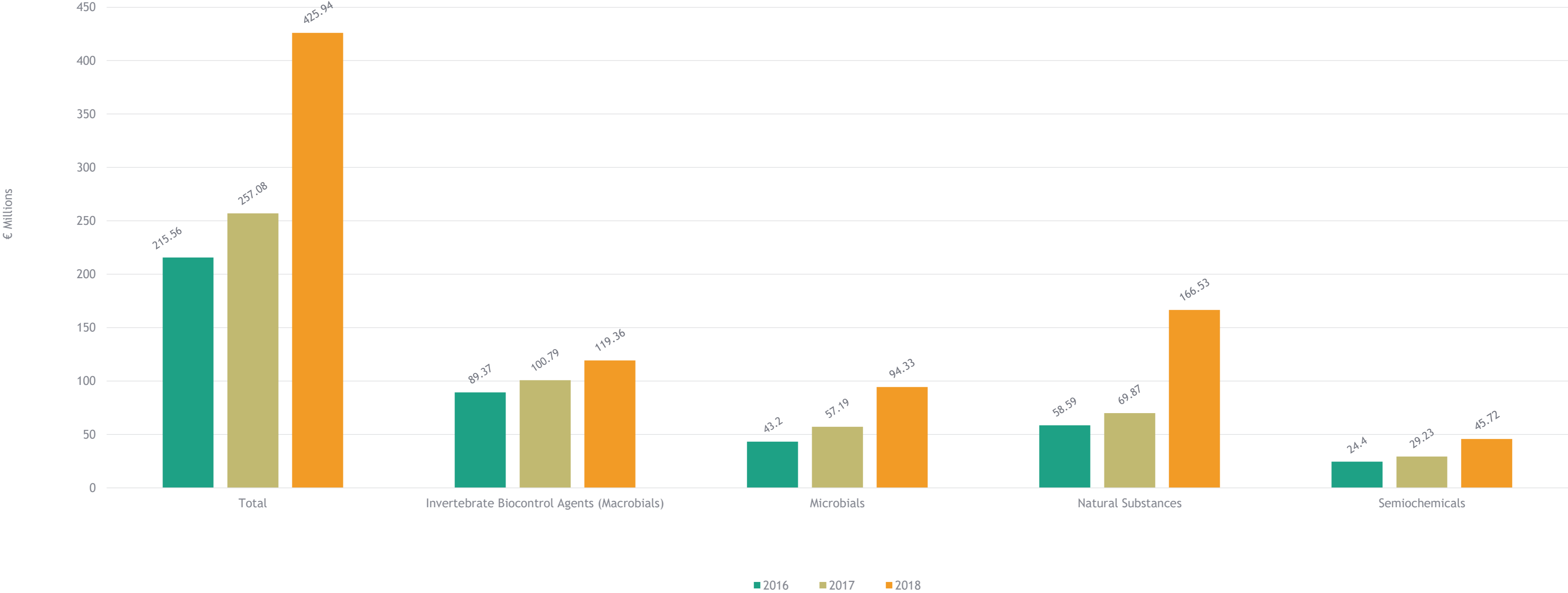


# Strong Growth in all Biocontrol Market Categories



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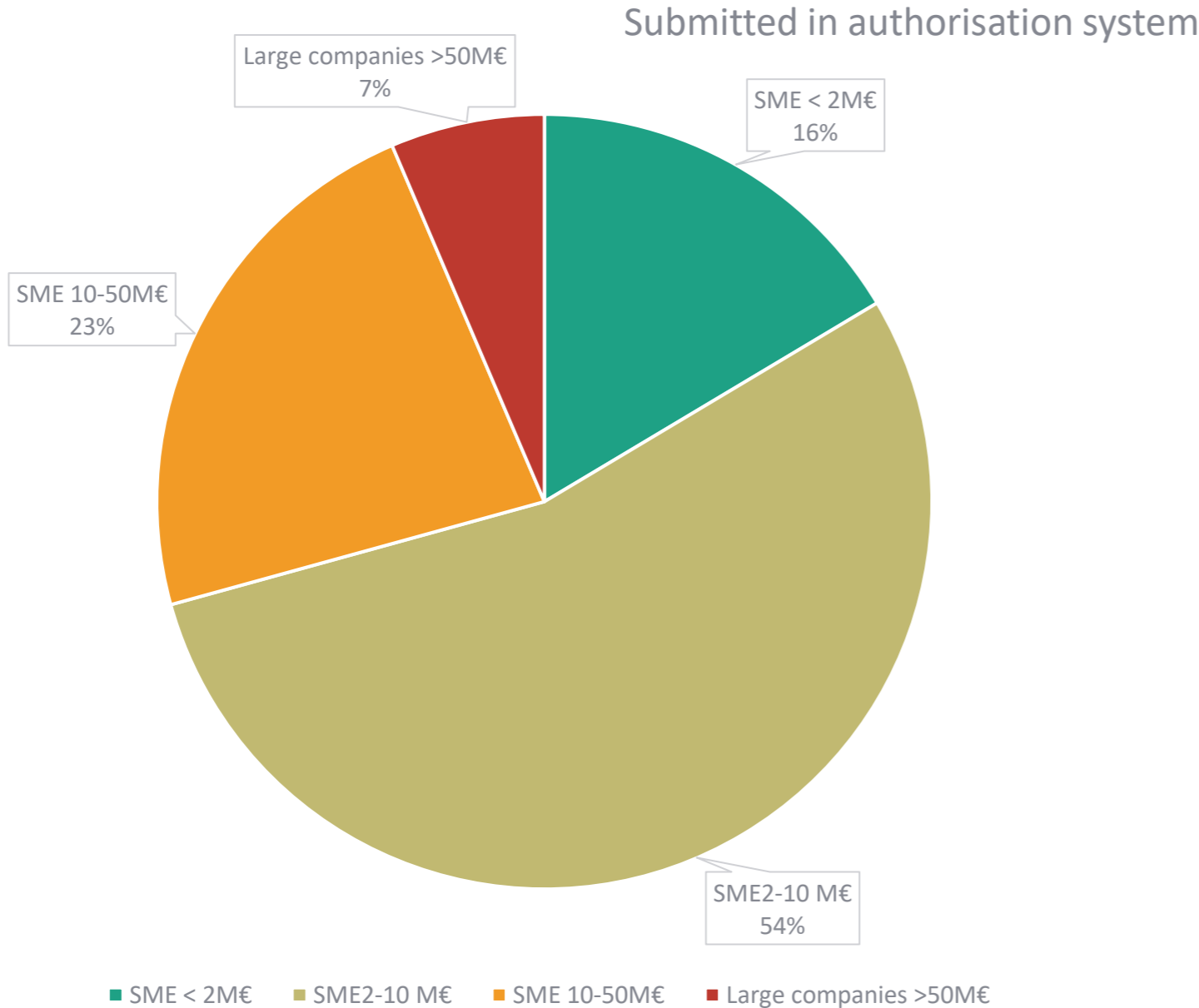
# Strong Pipeline of Products



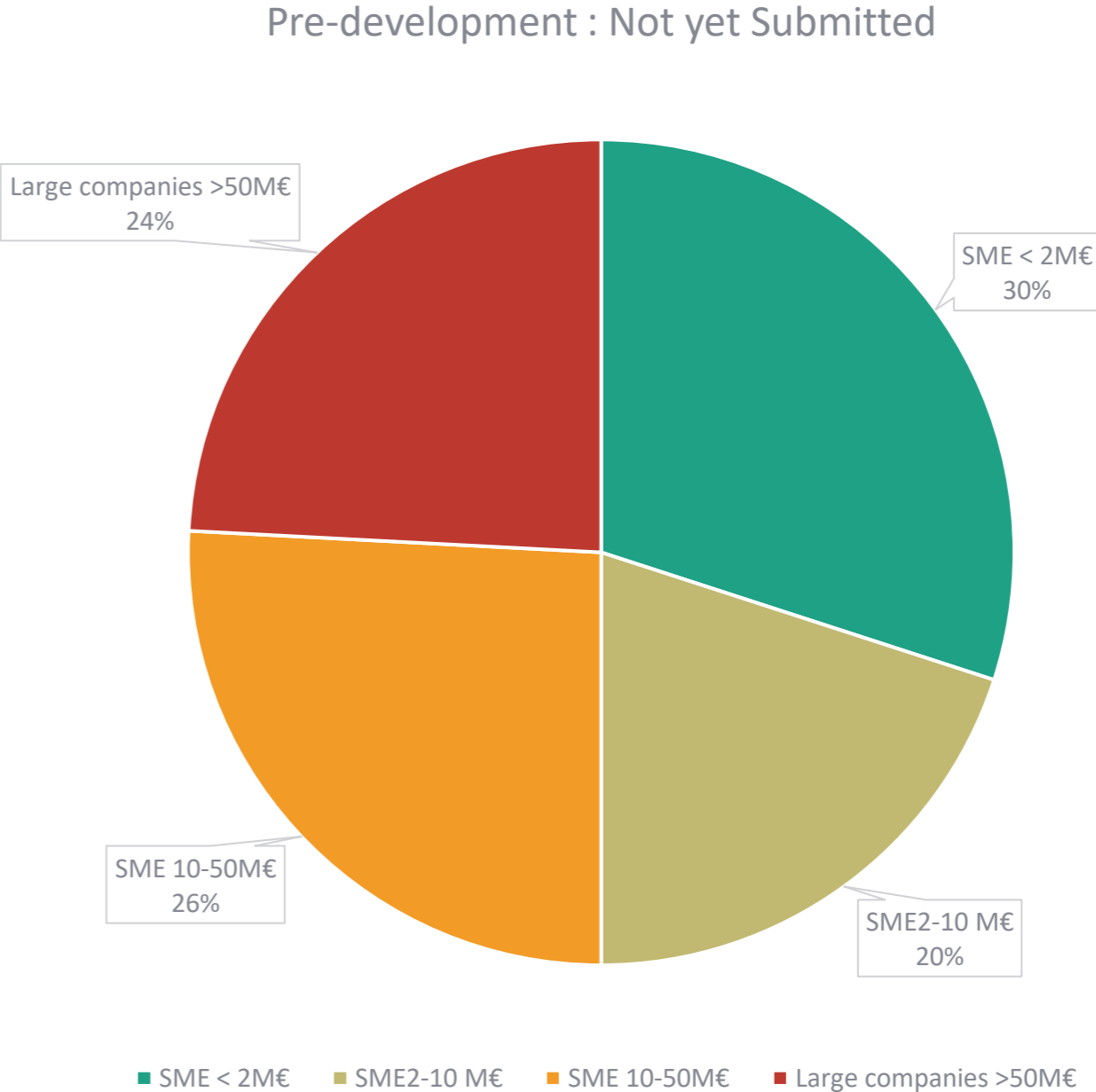
Over 140 products in pipeline within European authorization system. Further 120 products not yet submitted

All graphical data is based on analysis of a subset of the data comprising 38% of members representing 49% of market value

## 140 Products awaiting Authorisation across European MS



## 120 Products pre-development and not yet submitted



# CONTACT US

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