

Biocontrol Market Size - IBMA Member Survey – Spring 2020

Introduction

The International Biocontrol Manufacturers Association (IBMA) represents over 250 members companies from across the world, of which 165 members are European companies from 17 different member states and 89% are SMEs. Biocontrol or bioprotection is defined by IBMA as the following 4 biocontrol technologies: invertebrate biocontrol agents, microbials, semiochemicals and natural substances.

In Spring 2020, IBMA conducted a survey of its members worldwide including members manufacturing and developing biocontrol products and members supporting biocontrol such as contract research organisations. Members' responses relate to the 2018 growing season. The survey focussed on the 182 member companies who develop and manufacture biocontrol products.

Key findings of the survey:

1. In 2018, the European Biocontrol Market was 1.015bn €, representing approximately 6% of the 16bn € crop protection market.
2. A more detailed analysis was conducted on a subset of 38% of these members representing 480M (approximately 50%) of sales in Europe and a further 280M in the rest of the world. Approximately one third of the sales of the industry are outside Europe indicating the contribution of the biocontrol industry to global trade.
3. SMEs predominate the industry with approximately 50% (239M €) of the sales within the subset of members being from SMEs. The majority of the remaining members are SMEs further indicating the predominance of SMEs in the biocontrol industry.
4. Each of the 4 types of biocontrol technologies, invertebrate biocontrol agents, microbials, semiochemicals and natural substances showed huge growth over the past 3 years. 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.
5. Biocontrol product availability showed over 1000 products are available across different European member states and that 86% of these are produced by SMEs. This is in contrast to the level of sales where up to 50% of the sales value is provided by non SMEs, indicating that a few larger companies and products account for up to half the market. However, to implement Integrated Pest Management (IPM) successfully a diverse range of specific products is necessary to manage the range of pests and diseases, and this range is provided by the SMEs in the biocontrol industry.
6. 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. The snapshot in time showed 66 active ingredient submissions comprising new submissions, renewal submissions, Task Forces where multiple companies submit on the same active substance (eg the 13 companies in the short chain lepidopteran pheromone task force) and recognising that there is the time lag between submission and its appearance on the EU database. The picture is one of extensive innovation and industry investment in new biocontrol products.