IBMA MARKET SURVEY 2021

Data based on 88 member companies’ sales in 2019 season market survey conducted by Independent Business Resources Ltd.
Biocontrol Market Size 1.2 bn €
In 2019, the European Biocontrol Market was 1.2bn €, representing approximately 10% of the 12bn € crop protection market. This is reflected in employee numbers.

Detailed analysis of 43% of the of market
The survey results are based on 41% of members representing 515M (43%) of agricultural biocontrol sales in Europe and a further 504M in the rest of the world.

SMEs predominate the market
SMEs predominate the industry in Europe, with approximately 61% (313M €) of the sales from the survey respondents being from SMEs.

Spectacular Growth between 2016 and 2019
Between 2016 and 2019 sales from the Active members responding to the survey, showed invertebrate biocontrol agents increased by 70%, microbials increased over three-fold while semiochemicals and natural substances more than doubled. Growth continues in Europe but is faster in The Rest of the World.

Around 1600 biocontrol products available across European Members states
Biocontrol product availability showed over 1600 products are available across different European member states and that 87% of these are produced by SMEs.

Extensive Innovation and Investment by biocontrol industry
In spring 2021 the pipeline showed over 104 products in the authorisation process across Europe and a further 102 products not yet submitted to the authorisation process. Active ingredient submissions by members are also numerous.
Total European Biocontrol Market Size 1.119 bn €

Total market size is based on survey of 180 members sales in 2019 growing season
All graphical data is based on analysis of a subset of the data comprising 41% of the members representing 43% of market value

61% of sales value is created by SMEs

87% of Biocontrol products are sold by SMEs (all categories invertebrate biocontrol agents, microbials, semiochemicals and natural substances)
Continued Growth in Biocontrol Market Categories in Europe

Total market size is based on survey of 180 members sales in 2019 growing season.
All graphical data is based on analysis of a subset of the data comprising 41% of the members representing 43% of market value.

Percentage increase or decrease in sales since 2016 and 2018

Base: Active members with a Ag Biocontrol turnover by type in Europe
Faster Growth in Biocontrol Market Categories outside Europe

Total market size is based on survey of 180 members sales in 2019 growing season
All graphical data is based on analysis of a subset of the data comprising 41% of the members representing 43% of market value. 57% of this subset were selling outside Europe in all years recorded.

Percentage increase or decrease in sales since 2016 and 2018

Base: Active members with a Ag Biocontrol turnover by type in Rest of World
Strong Pipeline of Products in Europe and Globally

Total market size is based on survey of 180 members sales in 2019 growing season
All graphical data is based on analysis of a subset of the data comprising 41% of the members representing 43% of market value

Base: Active members with a Ag Biocontrol turnover in Europe excluding partials (49)

Submitted for registration
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Submitted for registration, 104
Submitted for registration, 102
Submitted for registration, 102
Submitted for registration, 12

Submitted for registration, 17
Submitted for registration, 34
Submitted for registration, 34
Submitted for registration, 12

Submitted for registration, 34
Submitted for registration, 128
Submitted for registration, 128
Submitted for registration, 121

Rest of the World