IBMA MARKET SURVEY 2021

Data based on 88 member companies' sales in 2019 season market survey conducted by Independent Business Resources Ltd.

IBMA Market Survey Summary

Total market size is based on 180 IBMA European members with an assigned Membership Fee Category

Survey data (for Europe) represents 44% of members with 66% of the total market value (calculated using the Membership Fee Category)

01 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.

02 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.

03 SMEs predominate the market

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

04 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.

05 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.

06 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.
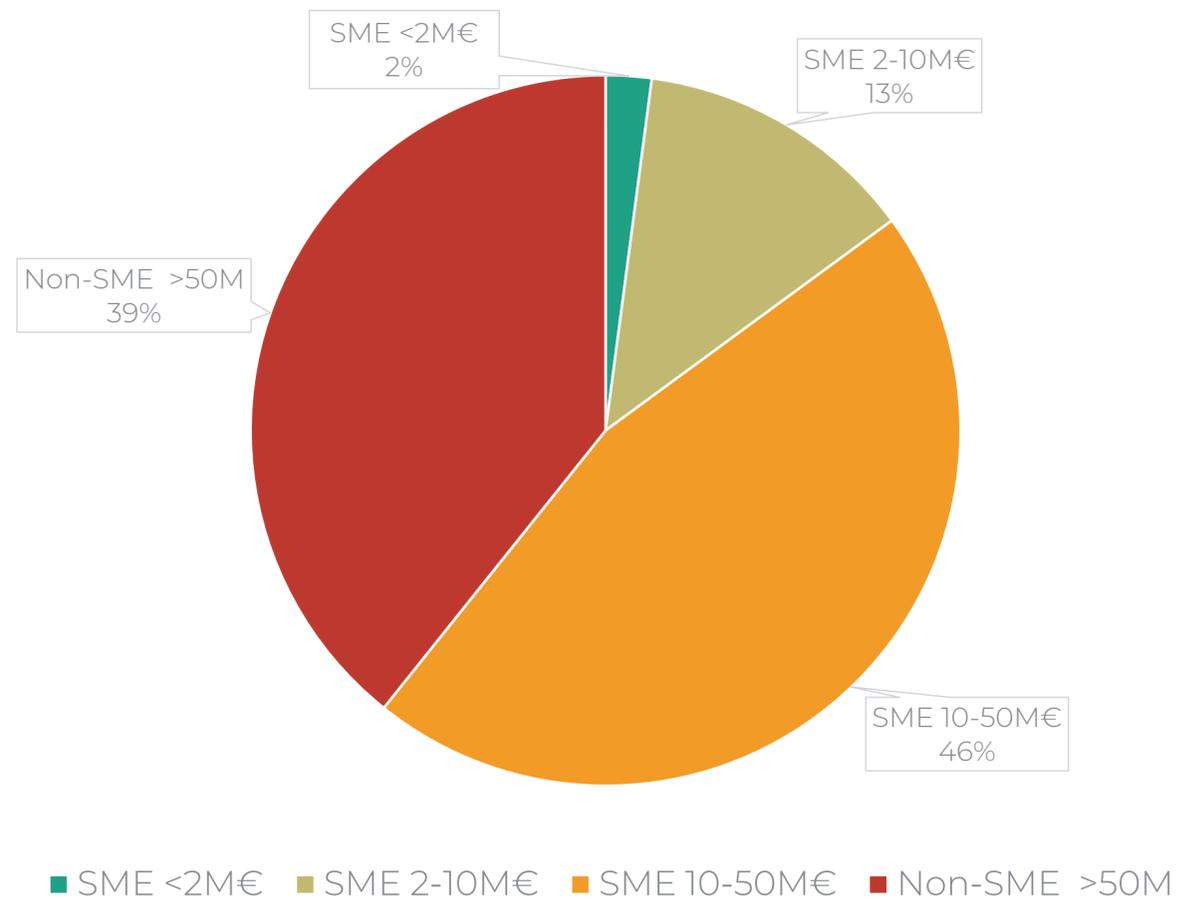
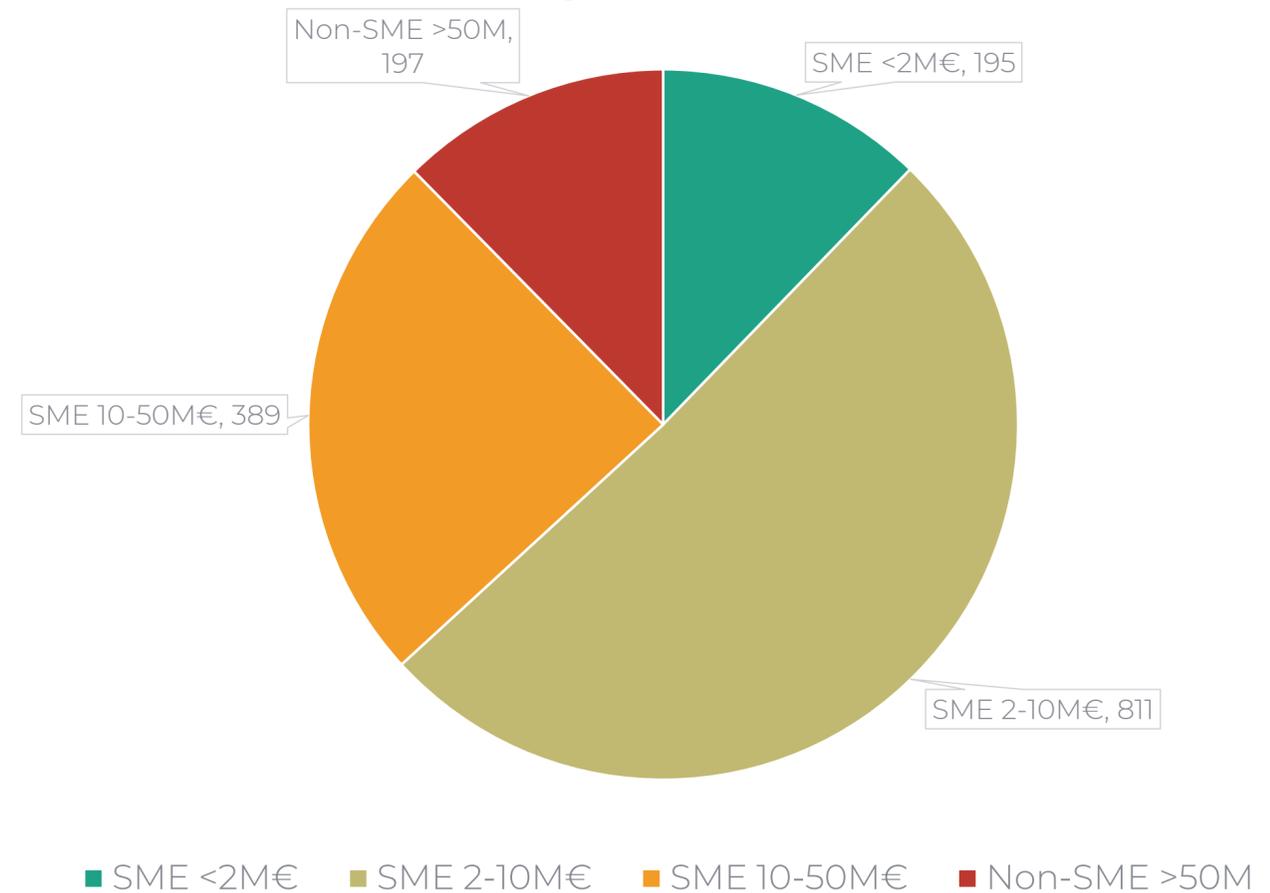# Total European Biocontrol Market Size 1.119 bn €

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

SME <2M€ 2%
SME 2-10M€ 13%
Non-SME >50M 39%
SME 10-50M€ 46%

- SME <2M€
- SME 2-10M€
- SME 10-50M€
- Non-SME >50M

87%of Biocontrol products are sold by SMEs (all categories invertebrate biocontrol agents, microbials, semiochemicals and natural substances)

Non-SME >50M, 197
SME <2M€, 195
SME 10-50M€, 389
SME 2-10M€, 811

- SME <2M€
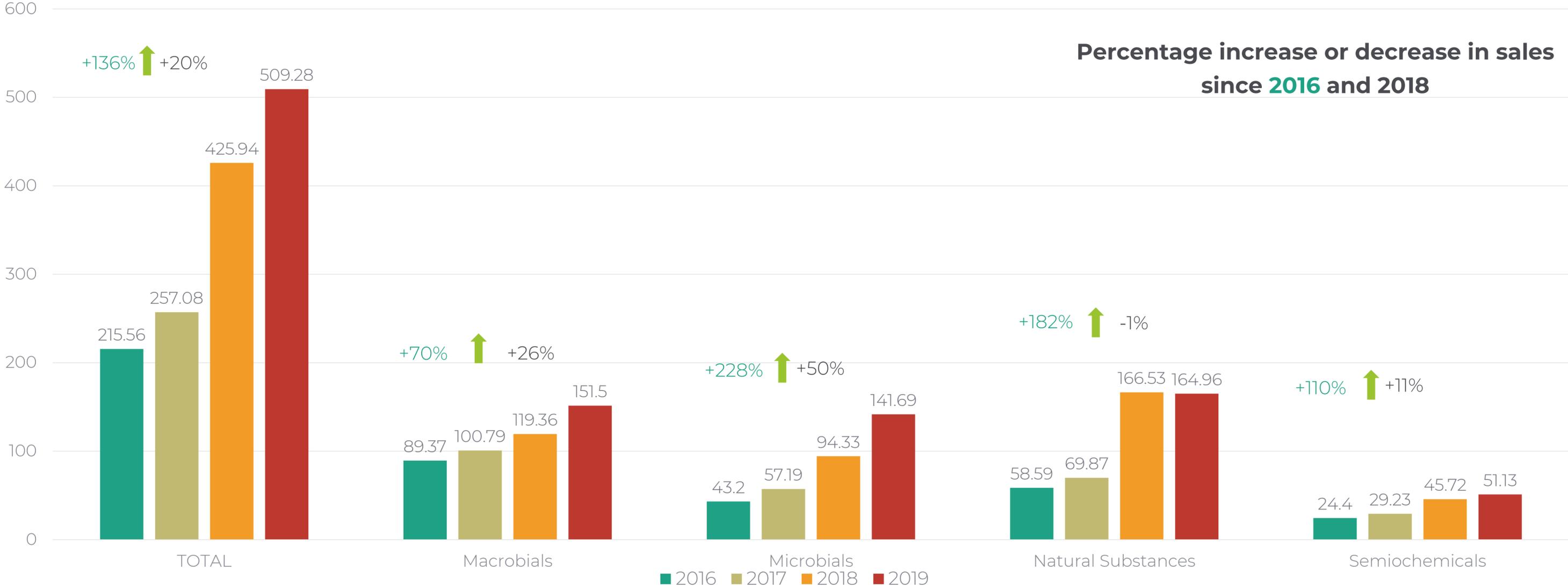- SME 2-10M€
- SME 10-50M€
- Non-SME >50M

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.
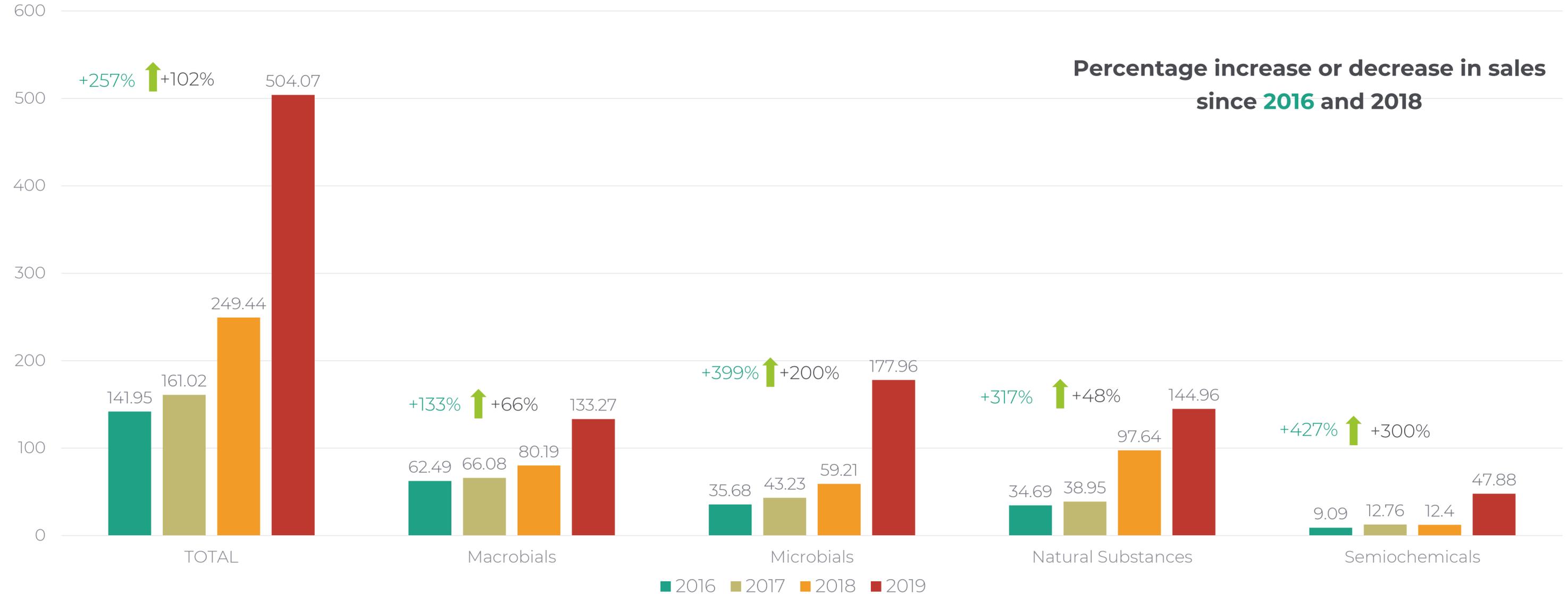
Percentage increase or decrease in sales since 2016 and 2018

Base: Active members with a Ag Biocontrol turnover by type in Europe

IBR
INDEPENDENT BUSINESS RESOURCE

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

Legend: 2016 2017 2018 2019

TOTAL: +257% ↑ +102% — 141.95, 161.02, 249.44, 504.07

Macrobials: +133% ↑ +66% — 62.49, 66.08, 80.19, 133.27

Microbials: +399% ↑ +200% — 35.68, 43.23, 59.21, 177.96

Natural Substances: +317% ↑ +48% — 34.69, 38.95, 97.64, 144.96

Semiochemicals: +427% ↑ +300% — 9.09, 12.76, 12.4, 47.88
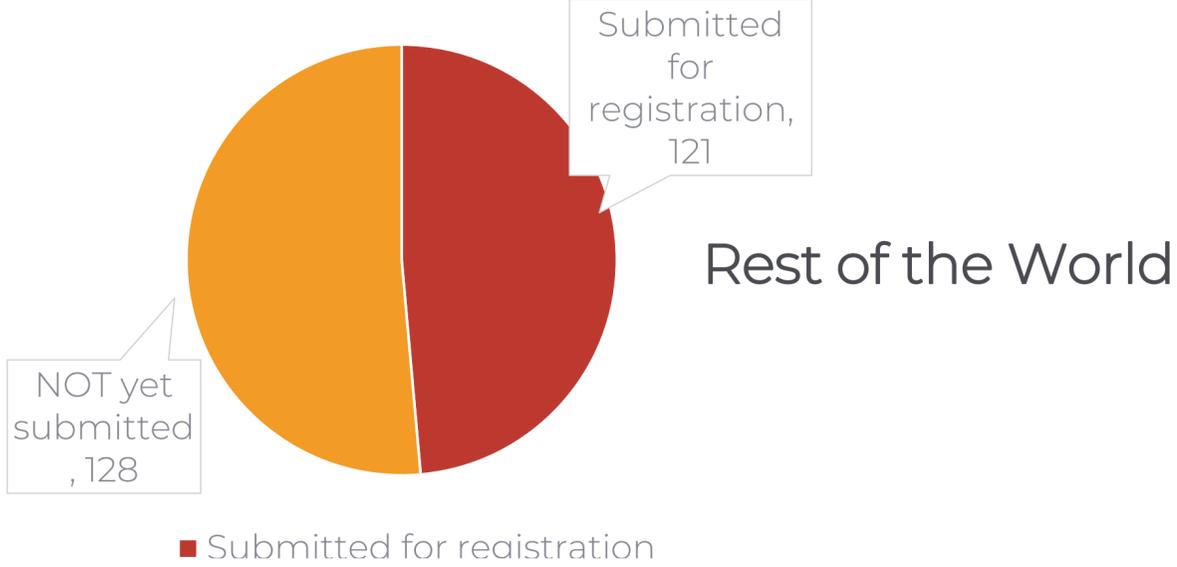
Base: Active members with a Ag Biocontrol turnover by type in Rest of World
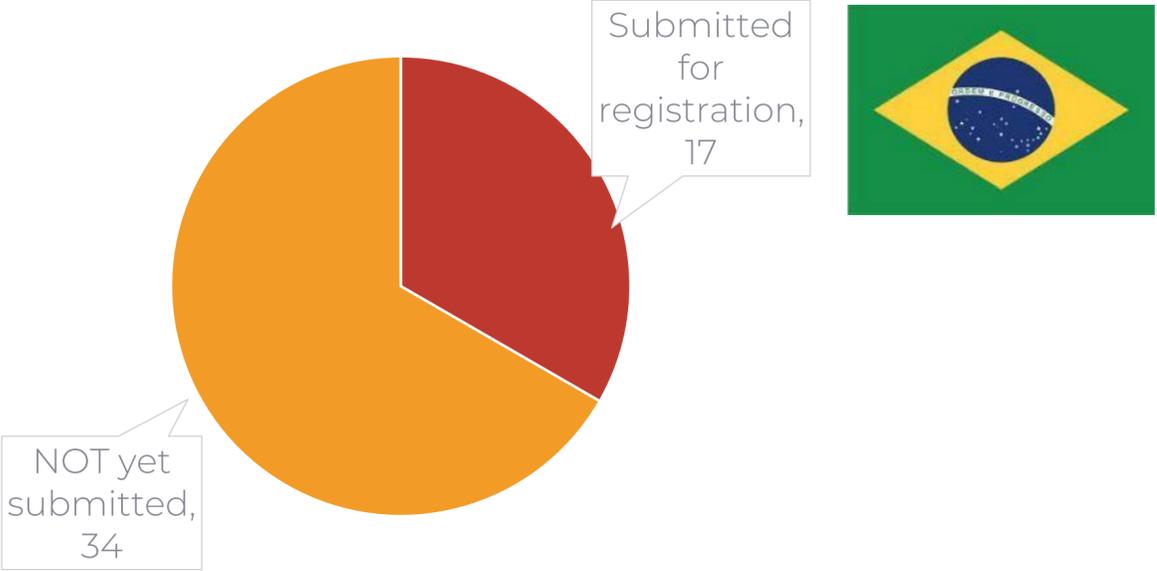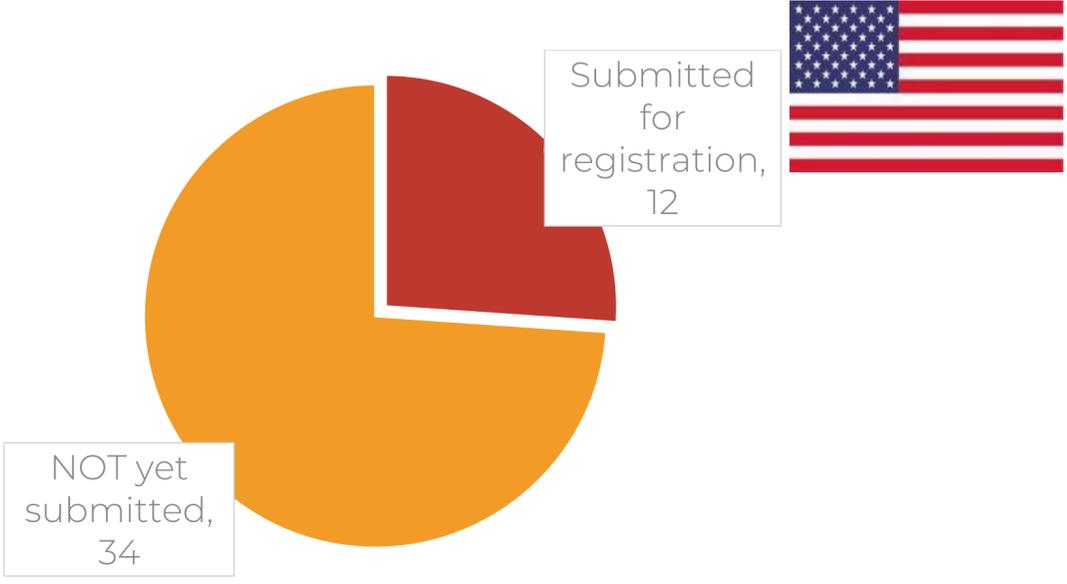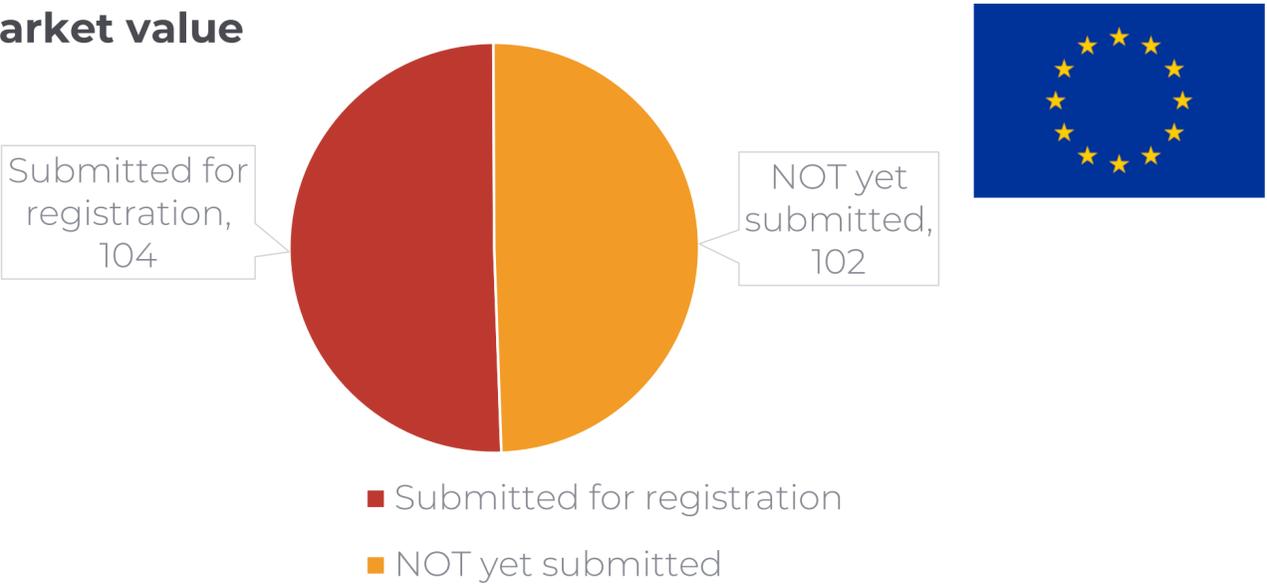
Strong Pipeline of Products in Europe and Globally

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

Submitted for registration, 104

NOT yet submitted, 102

■ Submitted for registration
■ NOT yet submitted

Submitted for registration, 12

NOT yet submitted, 34

Submitted for registration, 17

NOT yet submitted, 34

Submitted for registration, 121

Rest of the World

NOT yet submitted, 128

■ Submitted for registration

CONTACT US

IBMA

International Biocontrol Manufacturers Association AISBL

Rue de Treves 61, 1040 Brussels, Belgium

WWW.IBMA-GLOBAL.ORG

EXECUTIVE DIRECTOR

Jennifer Lewis

jennifer.lewis@ibma-global.org

REGULATORY CONSULTANT

Ulf Heilig

ulf.heilig@ibma-global.org

ADVOCACY AND COMMUNCATION MANAGER

Isabelle Pinzauti Babrzynski

isabelle.pinzauti@ibma-global.org

ADMINISTRATION

Louisa Puschel

administartion@ibma-global.org

Britta Schnittger

Britta.schnittger@ibma-global.org