

Biocontrol Market Size - IBMA Member Survey – Spring 2021

Introduction

The International Biocontrol Manufacturers Association (IBMA) represents over 230 member companies globally, of which 160 members are European companies from 17 different member states and over 80% are SMEs. Biocontrol or bioprotection is defined by IBMA as 4 biocontrol technologies: invertebrate biocontrol agents, microbials, semiochemicals and natural substances.

In Spring 2021, 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 2019 growing season. The survey focussed on the 180 member companies who develop and manufacture biocontrol products.

Key findings of the survey:

1. In 2019, the European Biocontrol Market was 1.199bn €, representing approximately 10% of the 12bn € crop protection market.
2. A more detailed analysis was conducted on a subset of 43% of these members representing 515M (approximately 41%) of sales in Europe and a further 504M in the rest of the world. Approximately half of the sales of the industry are outside Europe indicating the contribution of the biocontrol industry to global trade, an increase from one third in 2018.
3. SMEs predominate the industry with approximately 61% (313M €) 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 4 years.
 - a. In Europe, between 2018 and 2019 sales in the 43% of the industry sampled, showed invertebrate biocontrol agents increased by 26%, while microbials doubled, semiochemicals increased by 11% and the natural substances were flat.
 - b. In the Rest of the World for the 43% of the industry sampled, market growth has exceeded that in Europe between 2018 and 2019. Sales of biocontrol overall have doubled, and showed invertebrate biocontrol agents increased by 66%, while microbials by 200%, semiochemicals by 300% and the natural substances by 48%.
5. Biocontrol product availability showed over 1500 products are available across different European member states and that 87% of these are produced by SMEs, while 61% of the sales value is with SMEs. This indicates that a few larger companies and products account for about one third of 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 2021 the pipeline showed over 100 products in the authorisation process across Europe and a further 100 products not yet submitted to the authorisation process. Active ingredient submissions by members are also numerous. Similar levels of pipeline products are seen across the rest of the world. The picture is one of extensive innovation and industry investment in new biocontrol products.
7. In the subset analysed, a small percentage (7%) of crop protection employees work in biocontrol. This small percentage may reflect the predominance of SMEs who frequently outsource or out-licence product development and marketing, so numbers would not be captured in this analysis. This point will be further explored in future surveys.