



# IBMA MEMBER SURVEY 2023

## European Biocontrol Market Information

based on data compiled by  
Clarion Research



## 2023 IBMA MEMBER SURVEY: INTRODUCTION

The International Biocontrol Manufacturers Association (IBMA) conducts annual member surveys, most recently in the last quarter of 2023. It showed the biocontrol market in Europe is now worth over 1.6 billion Euro representing about 10% of the European crop protection market. The biocontrol market has doubled since 2016 but growth slowed in the 2019 to 2022 period.

The survey has revealed that the majority of biocontrol businesses operating in Europe have a revenue of less than 50 M Euro.

All four biocontrol categories (Microbials, Natural Substances, Semiochemicals, Invertebrates) are growing. Invertebrates have grown most with an estimated 65% increase in sales volume since 2019, which is to be expected as the authorisation process is significantly shorter. The Natural Substances category has grown the most in terms of absolute value, increasing by 168.3 million Euros since 2019. This category tends to be an entry point for manufacturers extending their product portfolios to include biologicals.

The results, highlighted in the following pages, clearly show that in order to return to the growth rates observed in the period prior to 2019-2022 and compared to the rest of the world, we need an EU-wide definition of biocontrol and a fast-track authorisation process for biocontrol products.

We thank our members for participating in the survey.

Herman van Mallert, President  
Jennifer Lewis, Executive Director



## MARKET VALUE AND GREEN INDUSTRY JOBS

# 1 **The European Biocontrol Market is valued at more than 1.6 Billion Euros**

- The size of the European Biocontrol Market has doubled since 2016, and grew by 20% between 2019 and 2022
- Biocontrol now accounts for about 10% of the total European Crop Protection Market
- The European Biocontrol Market is growing at a CAGR of nearly 10%, compared to the 2-4% growth rate in conventional crop protection
- The European Biocontrol Market provides more than 6500 green industry jobs

## SMALL AND MEDIUM-SIZED ENTERPRISES (SMEs)

# 2 **SMEs are the driving force in biocontrol**

- Growth in the European Biocontrol Market is being driven by SMEs
- SMEs account for 36.5% of total European Biocontrol market, with a sales volume of 584.4 Million Euros
- SMEs command a 70.7% share of the combined Microbials, Semiochemicals, and Invertebrates

## BIOCONTROL CATEGORIES GROWTH

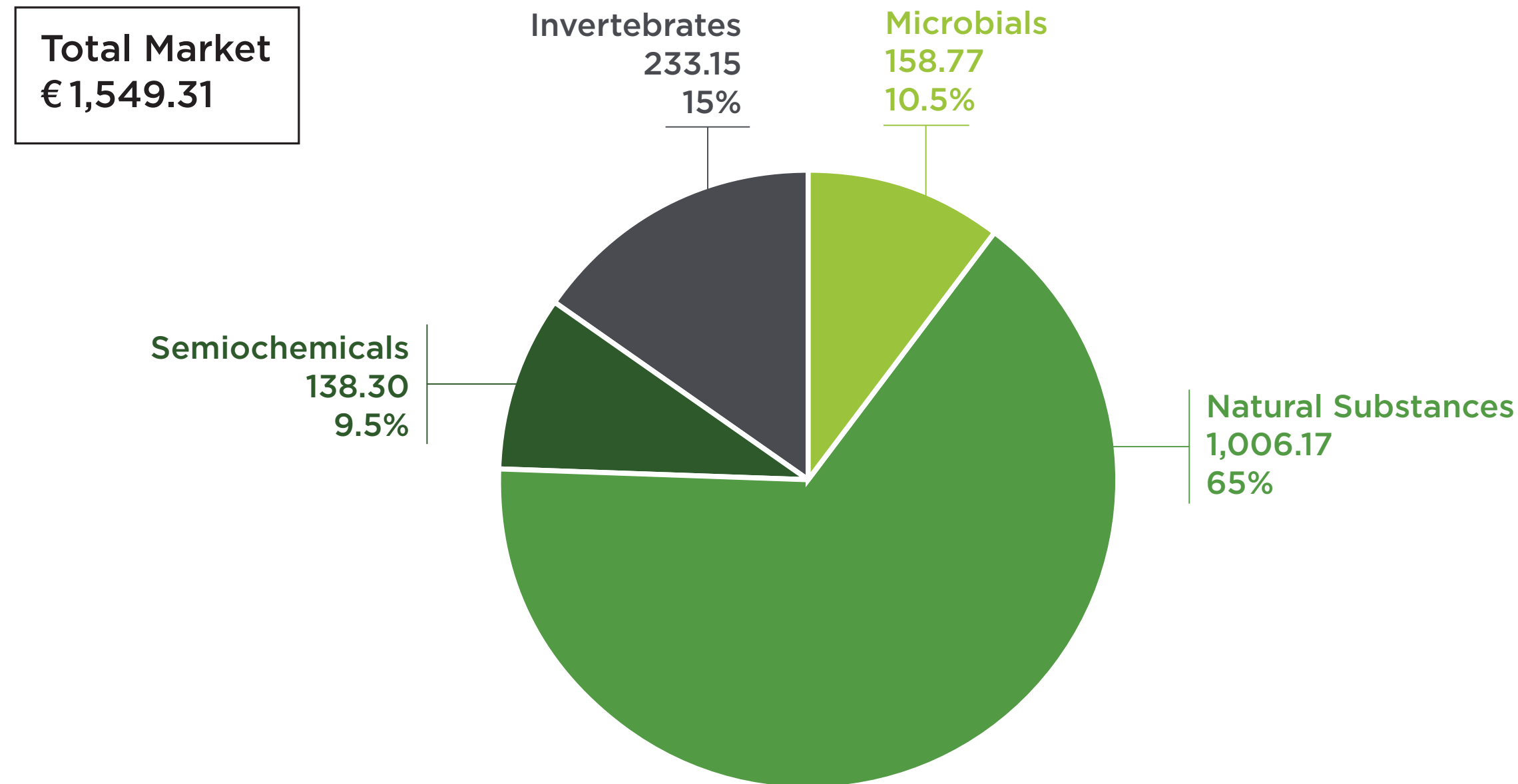
# 3 **All four biocontrol categories (Microbials, Natural Substances, Semiochemicals, Invertebrates) have grown since 2019**

- Invertebrates are the fastest growing category, with 65% increase in sales volume vs. 2019
- The Natural Substances category has grown the most in terms of absolute value, increasing by 168.3 Million Euros since 2019

*All data collected in this report is FY 2022.*

Natural Substances and Invertebrates make up about 80% of the European Biocontrol Market. Both segments are proportionally larger than in other global regions. Conversely, Microbials have a much smaller share of the market in Europe than in other regions, while Semiochemicals are roughly equal.

## Total European Biocontrol Market 2022 (€ Million)\*



This data reflects reported revenue from IBMA Active Members (manufacturers) only. It does not include non-IBMA member data.

# 5983

Total Number of Employees from among IBMA Active Member Companies that work in the European Biocontrol Market\*

# 562

Total Number of Employees from among IBMA Associate Member Companies that work in the European Biocontrol Market\*

# 6545

Total Number of IBMA Member Employees that work in the European Biocontrol Market\*

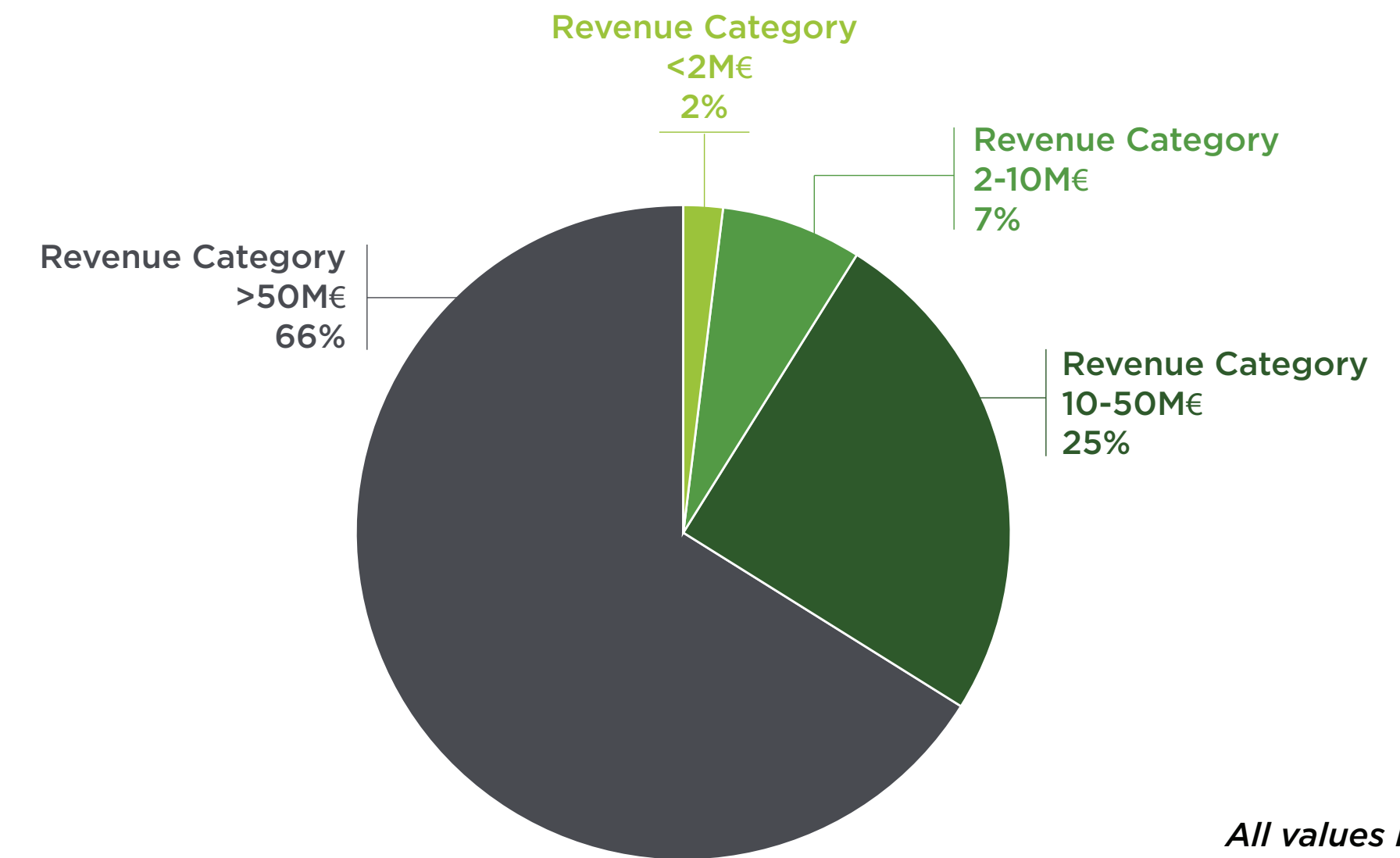
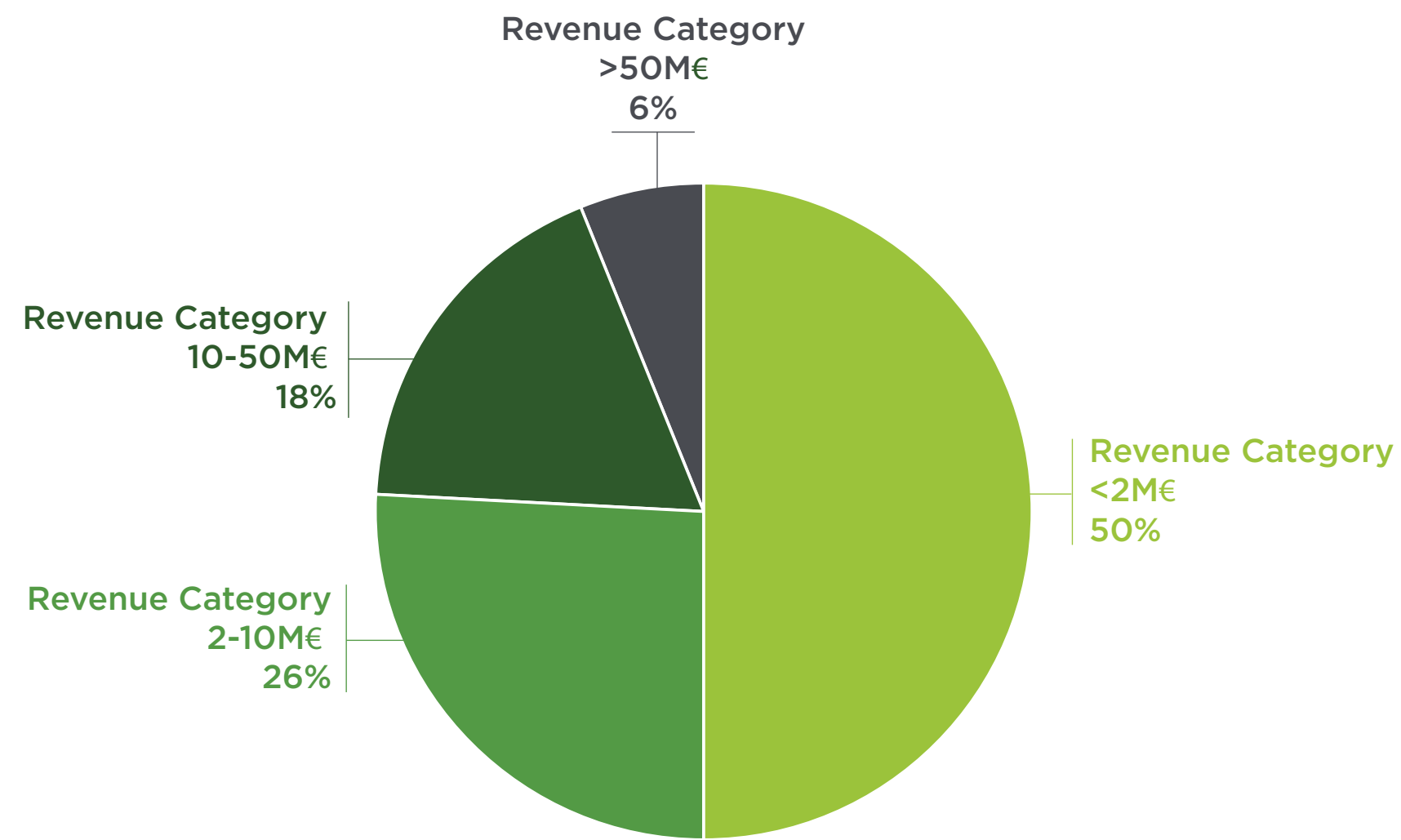
\* Values assume a proportionate number of employees (based on revenue) for non-responding companies.

In European Biocontrol terms only, 95% of Biocontrol Manufacturers (Active Members) with operations in Europe have a revenue of <50M Euro.\* 100% of Associate Members (non-Manufacturers) have a revenue of <50M Euro. As a percentage, companies with an annual turnover of less than € 2 Million account for half of IBMA Active Members.

Small enterprises of <2M Euro account for about 7% of the market by sales volume. That segment is the industry's growth engine, as more than 20 of the Active Members are still in the pre-revenue stage. 66% of share is from companies >50M Euro. These often global companies comprise (i) specialised biocontrol companies growing and expanding globally and (ii) conventional crop protection companies moving from chemical to biological control.

## 2022 IBMA Active Members by Revenue Category

## 2022 European Biocontrol Market Share by Revenue Category



All values FY 2022

\* IBMA estimates that about 77% of Active Members' global businesses fall within the Small and Medium-Sized Enterprises (SME) threshold of <50M Euros

## 2022 European Biocontrol Market: Growth by Categories (€ Million)

The European Biocontrol Industry has experienced impressive growth since 2016, doubling in size.

The Annual Growth rate in the first 3 years was 17% but declined to 8% in the last 3 years.

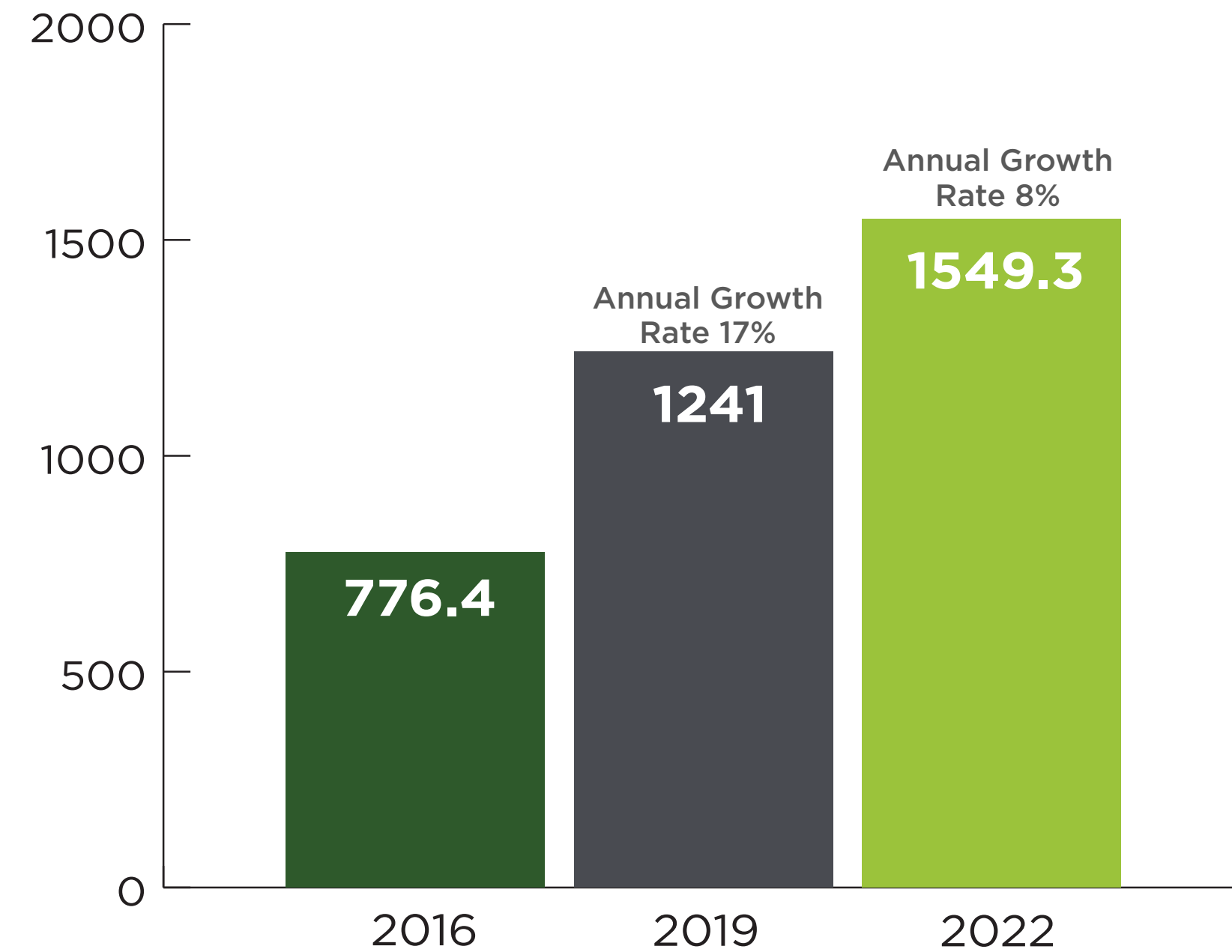
Biocontrol growth in Europe in the past 3 years (2019-2022) has slowed for the biocontrol plant protection products.

In contrast, the growth in invertebrate biocontrol has continued to nearly double.

The difference in growth rates reflects the difficult and slow regulatory process for biocontrol plant protection products compared to invertebrate biocontrol.

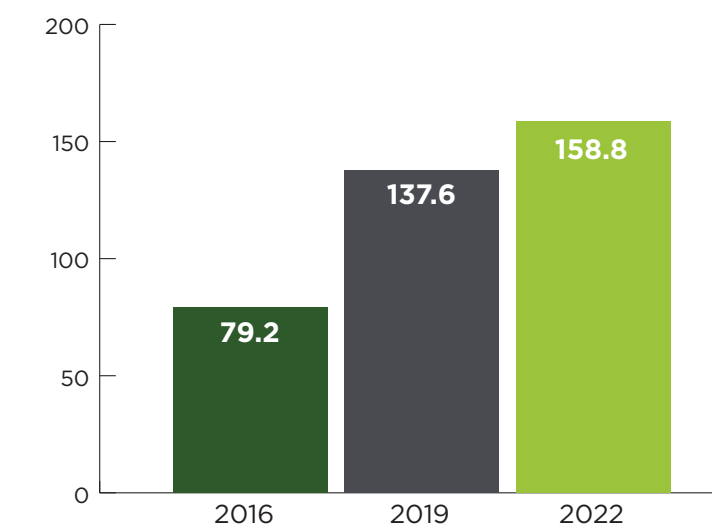
### Total Market

% CHANGE SINCE 2016: 100% ↑  
% CHANGE SINCE 2019: 20% ↑



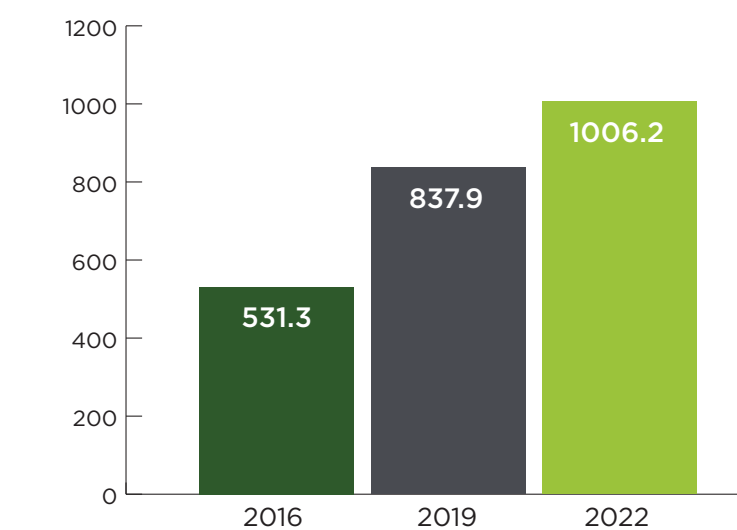
### Microbials

% CHANGE SINCE 2016: 100% ↑  
% CHANGE SINCE 2019: 15% ↑



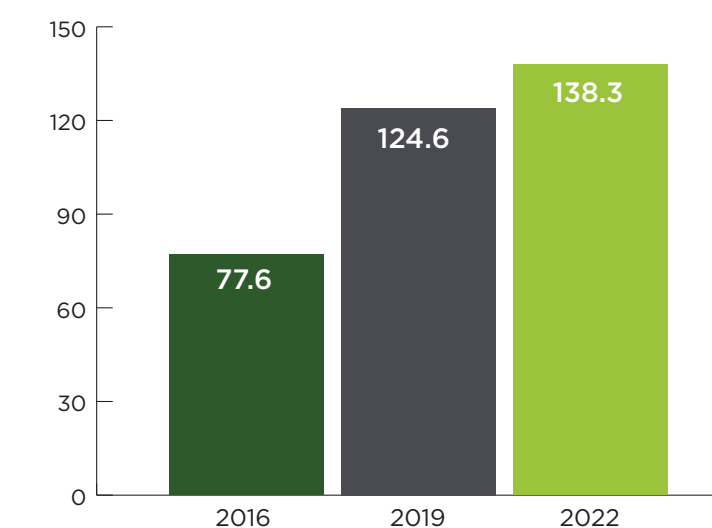
### Natural Substances

% CHANGE SINCE 2016: 89% ↑  
% CHANGE SINCE 2019: 20% ↑



### Semiochemicals

% CHANGE SINCE 2016: 78% ↑  
% CHANGE SINCE 2019: 11% ↑



### Invertebrates

% CHANGE SINCE 2016: 164% ↑  
% CHANGE SINCE 2019: 65% ↑

