

# GLOBAL BIOPESTICIDES MARKET SUMMARY

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*This case study is an historic example of a market report on global biopesticides produced by CPL Business Consultants. Please contact us if you would like to commission an updated version.*

## THE GLOBAL BIOPESTICIDES MARKET

This multiclient study analysed and projected the markets for biochemical and microbial biopesticides, invertebrate biocontrol agents and pheromones. CPL described key global developments and trends for North America, Europe, Asia & Australasia, Latin America, and Africa & the Middle East. We also summarised the validated market data along with growth rates (CAGR), major players and product tables.

This report illustrates the historical depth of knowledge CPL Business Consultants has in this sector. Since the publication of this study CPL has also worked on numerous [single-client projects in bioprotection](#); please contact us if you would like this report updated.

CPL's studies are based on primary data obtained from those working in the sector combined with information from our database, other studies and the public domain. We analysed these combined data to provide insight and guidance for companies interested in making and selling biopesticides.

Please click to see an example of the [Contents of the Global Biopesticides Market Summary](#) or see the details below. For details of other reports in the historic Biopesticides series, click [here](#).

## BIOPESTICIDES MARKET INSIGHTS

In 2013 we estimated the worldwide biopesticides to be ~\$2.8b at the user level. This followed unprecedented growth of 27% CAGR between 2007 and 2012. Our review of the market indicated that this growth in sales is a result of various factors, including:

- increased pressure from authorities and consumers for greater sustainability
- greater user confidence in product performance,
- new product introductions,
- improved scientific credibility, and
- an increasingly vigorous industry with increased interest from agrochemical majors

This, therefore, produced a paradigm shift towards biopesticides, with growth in biopesticide sales continuing strongly. We expected the greatest growth in Latin America. At the time, we estimated the European and North American markets to be \$830m and \$762m, respectively and anticipated them both to exceed \$1b by 2017.

Globally, products based on ‘natural’ biochemicals dominate the market, taking about one-third of sales revenue. This is also the fastest-growing sector, having seen a dramatic increase in the number of products available. Microbial pesticides and invertebrate biocontrol agents are the next largest sectors, although this varies by region. In Latin America, for example, sales of microbial products constitute 41% of biopesticide sales, more than twice that of biochemicals.

CPL estimated the worldwide microbial pesticides market to be \$804m at the user level and with historical growth at a 10-year CAGR of 12%. Products based on *Bacillus thuringiensis* had lost market share from a reported 90% in the late 1990s to around 45-50%, mainly due to the development of competing microbial pesticides and new highly cost-effective chemicals.

This volume of 98 pages included 18 tables, 25 figures and information on hundreds of biopesticide agents. We also published a [summary in Japanese](#).

*Have a look at our [PowerPoint Introduction](#) and [Brochure](#) describing deliverables, differentiators and case studies. You can also review [eight case studies](#).*