

Global Agricultural Biological Control Agents Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Agricultural Biological Control Agents market size is expected to reach \$ 13212 million by 2032, rising at a market growth of 6.2% CAGR during the forecast period (2026-2032).

Agricultural Biological Control Agents are commercially supplied microorganisms, natural substances, semiochemicals, predatory or parasitic invertebrates used to suppress agricultural pests, plant diseases, nematodes, weeds or other harmful organisms. The core function of Agricultural Biological Control Agents is to provide targeted pest management through biological activity, natural chemistry, communication disruption, predation or parasitism, reducing dependence on conventional synthetic pesticides and supporting integrated pest management programs. Agricultural Biological Control Agents includes finished microbial pesticides, botanical or other natural-substance products, pheromone-based control devices, beneficial insects, predatory mites and entomopathogenic nematodes.

Upstream supply includes microbial strains, fermentation substrates, natural extracts, pheromone intermediates, encapsulation materials, carrier systems, insect-rearing feed and breeding colonies. Supply security depends on strain preservation, contamination control, fermentation yield, extract standardization, pheromone purity, formulation stability and the continuous maintenance of healthy invertebrate colonies.

Downstream users include commercial farms, protected-crop growers, orchards, plantations, nurseries, agricultural cooperatives, distributors and professional crop-protection service providers. Microbial and natural-substance formulations are commonly purchased through annual distributor programs, seasonal framework agreements or direct contracts with large farming groups. Beneficial insects and mites

are more frequently supplied through repeated scheduled deliveries because the products are perishable and must be aligned with crop development and pest pressure. Pheromone products are purchased through seasonal programs based on orchard or plantation acreage and the required number of dispensers per hectare. Public procurement is relevant where governments subsidize green-control programs or coordinate responses to invasive pests, but private distributor networks remain the dominant route in most commercial markets. Manufacturing economics vary substantially by product class. The estimated industry-average manufacturer gross margin is approximately 38.0%. Higher margins are supported by proprietary strains, validated production protocols, regulatory registrations, specialized fermentation, high-purity pheromone synthesis, controlled-release engineering and technical application knowledge. These advantages are partly offset by high registration expenses, biological batch variability, cold-chain costs, limited shelf life and the need for continuous field validation.

In the current market, top 5 suppliers control approximately 17.2% of global revenue CR5, indicating a fragmented market with a small number of international platforms and a broad base of regional specialists. Europe remains an important demand center for natural substances, pheromones and beneficial invertebrates, while Latin America, China and other parts of Asia are increasingly important for microbial products used on large-acreage crops. North America combines mature specialty-crop demand with expanding biological seed treatment and field-crop applications. During 2026-2032, demand will be driven by resistance management, residue limits, restrictions on conventional active ingredients, retailer sustainability requirements and the expansion of integrated pest management. Formulation advances are expected to improve shelf life, temperature tolerance and compatibility with conventional crop-protection programs. Digital monitoring, AI-supported pest forecasting and precision application will improve product timing but will not replace the biological agent itself. Key bottlenecks include lengthy registration processes, inconsistent regulatory definitions, biological production variability, limited cold-chain infrastructure, shortages of specialist technical support and the difficulty of maintaining efficacy under highly variable field conditions.

This report studies the global Agricultural Biological Control Agents demand, key companies, and key regions.

This report is a detailed and comprehensive analysis of the world market for Agricultural Biological Control Agents, and provides market size (US\$ million) and Year-over-Year (YoY) growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Agricultural Biological Control

Agents that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Agricultural Biological Control Agents total market, 2021-2032, (USD Million)

Global Agricultural Biological Control Agents total market by region & country, CAGR, 2021-2032, (USD Million)

U.S. VS China: Agricultural Biological Control Agents total market, key domestic companies, and share, (USD Million)

Global Agricultural Biological Control Agents revenue by player, revenue and market share 2021-2026, (USD Million)

Global Agricultural Biological Control Agents total market by Agent Class, CAGR, 2021-2032, (USD Million)

Global Agricultural Biological Control Agents total market by Application, CAGR, 2021-2032, (USD Million)

This report profiles major players in the global Agricultural Biological Control Agents market based on the following parameters - company overview, revenue, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include BioFirst Group, Koppert, Certis Biologicals, Sumitomo Biorational, Andermatt Group, Rovensa Next, DE SANGOSSE, Suterra, M2i Life Sciences, e-nema, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the world Agricultural Biological Control Agents market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), by player, by regions, by Agent Class, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Agricultural Biological Control Agents Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Agricultural Biological Control Agents Market, Segmentation by Agent Class:

Bioinsecticides

Biofungicides

Bionematicides

Bioherbicides

Other Biological Control Agents

Multi-Target Biological Control Agents

Global Agricultural Biological Control Agents Market, Segmentation by Control Function:

Arthropod Control

Disease Control

Nematode Control

Weed Control

Other Pest Control

Multi-Target Control

Global Agricultural Biological Control Agents Market, Segmentation by Delivery Form:

Liquid Formulations

Dry Formulations

Controlled-Release Devices

Live Invertebrate Packs

Other Delivery Forms

Global Agricultural Biological Control Agents Market, Segmentation by Application:

Vegetables

Fruits

Cereals

Industrial Crops

Oilseeds

Pulses

Ornamental Crops

Other Crops

Companies Profiled:

BioFirst Group

Koppert

Certis Biologicals

Sumitomo Biorational

Andermatt Group

Rovensa Next

DE SANGOSSE

Suterra

M2i Life Sciences

e-nema

BioBee

Vittia

Simbiose Agro

AgBiTech

Shin-Etsu Chemical

STK Bio-Ag Technologies

River Bioscience

Sibbiopharm

IPL Biologicals

Bioforce

Wuhan Kernel Bio-tech

Chengdu Newsun Crop Science

Shandong Lukang Biological Pesticides

Shanghai Wanlihua Biotechnology

Chongqing Julixin Bioengineering

Yunnan Xingyao Biological Products

Jiangxi Xinlong Biological Technology

Key Questions Answered

1. How big is the global Agricultural Biological Control Agents market?
2. What is the demand of the global Agricultural Biological Control Agents market?
3. What is the year over year growth of the global Agricultural Biological Control Agents market?
4. What is the total value of the global Agricultural Biological Control Agents market?
5. Who are the Major Players in the global Agricultural Biological Control Agents market?
6. What are the growth factors driving the market demand?

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