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Global RNA Biopesticide Market Growth (Status and Outlook) 2026-2032

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Abstracts

The global RNA Biopesticide market size is predicted to grow from US$ 92.05 million in 2025 to US$ 355 million in 2032; it is expected to grow at a CAGR of 19.4% from 2026 to 2032.

RNA Biopesticide refers to crop-protection products and pesticidal traits whose biological activity is primarily based on RNA molecules, particularly double-stranded RNA (dsRNA), which induce RNA interference (RNAi) and sequence-specific gene silencing in target pests or pathogens. The market is primarily divided into PIP and Non-PIP pathways. PIP products are plant-incorporated protectants in which genetically engineered crops express pesticidal RNA within plant tissues and are commercialized mainly through seed and trait systems. Non-PIP products use externally manufactured RNA active ingredients that are formulated for foliar spray, irrigation, root-zone application, seed treatment, or other targeted delivery routes. Core technical elements include target-sequence design, RNA production and purification, formulation, delivery, environmental stabilization, target uptake, and quality control. By Application, the market is divided into Farmland, Orchard, and Other applications, covering major field crops, potatoes, fruit crops, tobacco, protected horticulture, and other specialty crops.

Key Findings

PIP remains the dominant commercial pathway, supported mainly by established RNAi traits in major field crops

Non-PIP is emerging as the principal incremental growth direction as externally applied RNA products broaden their crop and target coverage

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Farmland remains the primary commercial application, while orchard and specialty-crop applications are moving toward broader commercialization

Commercial maturity remains highly uneven by region, with established markets coexisting with regulatory-entry and pre-commercial regions

The competitive landscape is concentrated in realized revenue but substantially broader in technology development and product pipelines

Market Trends

The RNA Biopesticide industry is transitioning from a market led primarily by RNAi-based PIP traits toward a more diversified structure in which externally applied Non-PIP products play an increasingly important role. Commercial PIP technologies remain concentrated in major field crops, especially corn, while Non-PIP development is expanding into insect control, fungal disease management, plant-virus control, nematodes, and other targeted applications. Advances in biological and cell-free RNA manufacturing, formulation stability, encapsulation, controlled release, uptake enhancement, and environmental protection are improving the practical feasibility of externally applied RNA products. Product development is also moving from narrowly defined crop-pest combinations toward broader portfolios covering potatoes, grapes, tobacco, horticultural crops, and other high-value applications. The long-term direction is toward highly selective crop-protection tools that can be integrated with conventional chemical and biological products in integrated pest management and resistance-management programs.

Market Dynamics

Drivers

Market development is being driven by increasing resistance to established pesticide modes of action, growing demand for selective crop-protection solutions, stricter residue and environmental expectations, and continued advances in RNA manufacturing and delivery technologies. Commercial deployment of RNAi traits has demonstrated the feasibility of RNA-based crop protection at agricultural scale, while the emergence of registered externally applied products is establishing an additional commercialization pathway. Regulatory progress in major agricultural markets and increasing participation by established seed and crop-protection companies are also supporting the transition from research-oriented development toward broader commercial adoption.

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Restraints

Commercialization remains constrained by formulation stability and field-performance limitations, particularly RNA degradation caused by ultraviolet exposure, rainfall, temperature, and biological activity in the environment. For Non-PIP products, manufacturing cost, application rate, delivery efficiency, and cost per hectare remain important commercial considerations. PIP products depend on genetically engineered seed and trait systems, making adoption closely linked to biotechnology regulation and seed-market acceptance. The still-limited number of registered RNA products and relatively narrow crop-target combinations also restrict near-term market breadth.

Opportunities

The most significant market opportunities are expected to come from the expansion of Non-PIP products into applications that are difficult to address through seed-based PIP systems. Potential growth areas include fungal diseases, plant viruses, difficult-to-control insect pests, nematodes, high-value fruit crops, protected horticulture, and specialty crops. Orchard and vineyard systems are particularly attractive because of high crop value, intensive crop-protection requirements, and strong demand for selective and low-residue solutions. Additional opportunities are also emerging in regions where regulatory pathways are becoming clearer and local field-validation programs are progressing toward registration and commercialization.

Challenges

The industry must demonstrate consistent field efficacy across different crops, climates, application systems, and pest populations while maintaining economically competitive treatment costs. Developers also face lengthy regulatory processes, extensive environmental and non-target testing requirements, scale-up risks in RNA manufacturing, formulation complexity, and the need to establish effective technical-support and distribution systems. Long-term commercialization will also depend on resistance-management stewardship, accurate target selection, intellectual-property protection, manufacturing reliability, and coordination among technology developers, seed companies, crop-protection companies, regulators, distributors, and growers.

Industry Chain Analysis

The RNA Biopesticide industry chain differs significantly between PIP and Non-PIP products. For PIP, upstream activities include target discovery, gene-sequence selection, genetic construct development, crop transformation, breeding, trait

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integration, seed multiplication, and regulatory testing. For Non-PIP, the upstream chain is more manufacturing-intensive and includes RNA sequence design, biological or cell-free synthesis, purification, analytical testing, formulation carriers, adjuvants, encapsulation materials, stabilizers, and delivery technologies. Technical value is increasingly concentrated in low-cost RNA production, environmental stability, target uptake, and effective delivery under field conditions.

Midstream activities include trait commercialization and seed production for PIP products, and RNA active-ingredient manufacturing, formulation, filling, packaging, and quality assurance for Non-PIP products. Downstream participants include seed and trait companies, crop-protection formulators, agricultural distributors, retailers, professional application services, grower cooperatives, and commercial growers. PIP economics are mainly linked to the value attributable to the RNAi pesticidal trait within a commercial seed system, while Non-PIP profitability depends more directly on RNA production cost, dose per hectare, formulation cost, manufacturing utilization, registered crop coverage, and channel efficiency. As the industry matures, value creation is expected to shift increasingly toward proprietary sequence design, formulation and delivery technologies, regulatory assets, and commercially validated crop-target portfolios.

Segment Insights

PIP remains the dominant product pathway because of established commercialization in major field crops, mature seed-distribution systems, and the scalability of trait-based deployment. However, its relative dominance is expected to moderate as Non-PIP products expand into additional crops, pests, and diseases. Non-PIP has stronger structural flexibility because externally applied RNA products can be adapted to multiple crops and target organisms without relying on genetically engineered seed systems. Improvements in RNA production economics, formulation stability, and delivery efficiency are expected to strengthen its commercial relevance over time.

By Application, Farmland remains the principal commercial segment, supported by RNAi traits in field crops and the commercialization of externally applied RNA products in selected broadacre applications. Orchard applications are developing around high-value fruit crops, fungal disease control, and other targeted uses where selective and low-residue solutions are particularly attractive. Other applications include tobacco, greenhouse and protected horticulture, nurseries, flowers, and specialty crops, where controlled production environments and high crop value can support adoption of targeted Non-PIP technologies.

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Downstream Market Opportunities

Downstream demand is expected to broaden from large-scale field-crop production toward higher-value and more specialized crop-protection systems. Field crops will remain the principal commercial foundation because of established RNAi traits and extensive planted areas, while potatoes and other crops facing insecticide-resistance pressure provide opportunities for externally applied RNA insecticides. Orchards, vineyards, protected horticulture, tobacco, vegetables, and other specialty crops offer attractive opportunities where growers place greater value on residue management, target specificity, and novel modes of action. The strongest commercial opportunities are likely to emerge where RNA products can be integrated into existing application practices and provide clear resistance-management, efficacy, or residue advantages.

Regional Insights

Regional commercialization remains highly uneven. North America and Latin America currently represent the principal commercial markets, supported largely by established RNAi crop traits, while North America also has the most diversified commercialization structure because both PIP and externally applied Non-PIP products have entered agricultural use. Latin America remains strongly supported by large-scale field-crop production and PIP adoption, while externally applied RNA products are creating additional development opportunities in high-value and export-oriented crops.

Europe remains at an early commercialization and regulatory-expansion stage, with Non-PIP products expected to play a leading role in future adoption. China has entered initial commercialization and is developing capabilities in RNA manufacturing, formulation, and domestic product development. Asia-Pacific excluding China remains mainly in R&D and pre-commercial development, with Australia and Japan important in technology development and other Asian agricultural markets providing longer-term application potential. The Middle East and Africa remain earlier-stage markets, with potential concentrated in high-value horticulture, protected agriculture, and other specialized crop-protection applications.

Competitive Landscape Analysis

The RNA Biopesticide market is highly concentrated in realized commercial revenue but considerably more diverse in technology development and product pipelines. Bayer has a strong commercial position in PIP through established RNAi corn traits, while Corteva is expanding its presence through next-generation corn trait systems. GreenLight

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Biosciences represents one of the most advanced commercial participants in externally applied Non-PIP RNA biopesticides. Other companies, including RNAissance Ag, Pebble Labs, Renaissance BioScience, AgroSpheres, Silicon Gene, Shanghai Plant Science Biotechnology, and Xiaomo Biotech, are positioned across RNA manufacturing, microbial or yeast-based delivery, formulation platforms, field-stage products, registration programs, and early commercialization. Competitive differentiation is increasingly shifting from ownership of individual RNAi traits toward integrated capabilities in low-cost RNA manufacturing, formulation and delivery, regulatory execution, target-specific product development, manufacturing scale-up, and access to seed or crop-protection distribution channels.

Report Scope

LPI (LP Information)' newest research report, the “RNA Biopesticide Industry Forecast” looks at past sales and reviews total world RNA Biopesticide sales in 2025, providing a comprehensive analysis by region and market sector of projected RNA Biopesticide sales for 2026 through 2032. With RNA Biopesticide sales broken down by region, market sector and sub-sector, this report provides a detailed analysis in US$ millions of the world RNA Biopesticide industry.

This Insight Report provides a comprehensive analysis of the global RNA Biopesticide landscape and highlights key trends related to product segmentation, company formation, revenue, and market share, latest development, and M&A activity. This report also analyses the strategies of leading global companies with a focus on RNA Biopesticide portfolios and capabilities, market entry strategies, market positions, and geographic footprints, to better understand these firms’ unique position in an accelerating global RNA Biopesticide market.

This Insight Report evaluates the key market trends, drivers, and affecting factors shaping the global outlook for RNA Biopesticide and breaks down the forecast by Type, by Application, geography, and market size to highlight emerging pockets of opportunity. With a transparent methodology based on hundreds of bottom-up qualitative and quantitative market inputs, this study forecast offers a highly nuanced view of the current state and future trajectory in the global RNA Biopesticide.

This report presents a comprehensive overview, market shares, and growth opportunities of RNA Biopesticide market by product type, application, key players and key regions and countries.

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Market Segmentation

Segmentation by Type:

PIP

Non-PIP

Segmentation by Target Organism:

Insect Pests

Nematodes and Mites

Pathogens

Other

Segmentation by Crop:

Potatoes

Corn

Other

Segmentation by Application:

Farmland

Orchard

Other

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This report also splits the market by region:

- Americas
  - United States
  - Canada
  - Mexico
  - Brazil
- APAC
  - China
  - Japan
  - Korea
  - Southeast Asia
  - India
  - Australia
- Europe
  - Germany
  - France
  - UK
  - Italy
  - Russia
- Middle East & Africa

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Egypt

South Africa

Israel

Turkey

GCC Countries

The below companies that are profiled have been selected based on inputs gathered from primary experts and analyzing the company's coverage, product portfolio, its market penetration.

Bayer

Corteva

GreenLight Biosciences

RNAissance Ag

Pebble Labs

Renaissance BioScience

AgroSpheres

Silicon Gene

Shanghai Plant Science Biotechnology

Xiaomo Biotech

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