

Agricultural Microbials Market by Type, Function (Soil Amendment and Crop Protection), Crop Type (Cereals & Grains, Oilseeds & Pulses, Fruits & Vegetables), Mode of Application, Formulation, and Region - Global Forecast to 2027

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Abstracts

The global agricultural microbials market is estimated to be valued at USD 6.4 billion in 2022. It is projected to reach USD 12.6 billion by 2027, recording a CAGR of 14.6% during the forecast period. The agricultural microbials market is projected to grow at an exponential rate due to factors such as the rise in demand for sustainable agricultural practices, favorable government regulations, an increase in demand for high-value crops, and a rise in the number of investments from key players in this market. Crop protection is the chief function that is targeted by larger companies in the agricultural microbials market. Microbials can be applied in several ways, of which foliar spray is the most widely accepted application mode across the globe. However, precision targeting and application advantages associated with seed treatment have been gaining importance in recent times for microbials across the globe. Controlled release are research institutions and key players exploring another technology to enhance integrated pest management and the sustainability of their products.

The use of biopesticides has increased consumer confidence in purchasing fruits & vegetables cultivated in a sustainable environment. The increasing pressure on farmers for the minimal use of chemical pesticides in the cultivation of fruits & vegetables has led to increased demand and encouraged the exploration of biological alternatives. Organizations such as the WHO and governments of different countries are focusing on decreasing levels of malnutrition, increasing sustainable farming practices, and attaining self-sufficiency in terms of food. This will drive the growth of the agricultural microbials market.

“The North America region is estimated to record a CAGR of 15.0% during the forecast period.”

In 2021, North America accounted for the largest market share, followed by Europe and the Asia Pacific, owing to the reduced dependence on chemical pesticides for crop protection in countries such as the US, Canada, Germany, and France. The agricultural microbials market in North America is growing at a CAGR of 15.0% during the forecast period, due to the rising demand in large economies, such as US, Canada, and Mexico countries. These are some of the regions that are experiencing high growth in organic farming, farm conversions from conventional to organic, and the development of newer biological solutions through research. The increasing growth of high-value crops and rising awareness among farmers about the environmental benefits of microbial solutions are expected to provide more scope for market expansion. Moreover, the ongoing R&D activities on newer microbial strains also render a scope for market growth. Government policies adopted by Asia Pacific countries toward sustainable agricultural practices and the support provided for the consumption of microbial products are the major factors driving the growth of this market.

Key players in the agricultural microbials market are BASF SE (Germany), Bayer CropScience (Germany), Sumitomo Chemicals Company Ltd. (Japan), Monsanto Company (US), Corteva (US), Syngenta AG (Switzerland), Certis USA LLC (US), Chr. Hansen Holding A/S (Denmark), Isagro S.p.A. (Italy), UPL Ltd. (India), and Novozymes A/S (Denmark).

The industrial organization and technology of agricultural microbial manufacturing industry are changing rapidly in North America. The US is the fastest-growing agricultural microbials country in North America due to an increase in cultivation. One of the major players of agricultural microbials in North America is FMC Corporation (US). Use of biological products in agriculture is becoming more popular in the region as they increase yield and enhance the quality of crops while lowering the need for chemical fertilizers, pesticides, and herbicides. The climatic variations in some parts of the US, such as California and other western states, have led to the increased use of biologicals by farmers.

“In 2021, the bacteria segment accounted for the largest share of 71.9% of the agricultural microbials market and is projected to grow at a CAGR of 14.3% by 2027.”

The application of bacteria in agriculture has increased, in terms of biofertilizers and

biopesticides, as these sustainably provide higher and healthy yields. Bacterial strains are easily available in the surrounding environment and can be isolated and reproduced. The application of bacterial strains in agriculture is expected to increase with the entry of agrochemical players and a rise in the number of product launches.

Bacillus species are the most dominant in the agricultural solutions market. Their ability to secrete large quantities (20–25 g/L) of extracellular enzymes has placed them among the most important industrial enzyme producers. New varieties of biological agricultural products are being developed at the desired temperature, pH activity, and stability properties, as this type of bacteria can ferment in the acid, neutral and alkaline pH ranges, and in the presence of thermophiles.

The strain of this bacterium is useful for inhibiting the growth of fungi, *Fusarium oxysporum* (25–34%). Also, they can cause root elongation for better uptake of nutrients and oxidize sulfate and solubilize phosphate in the soil. The most used microbial pesticides are strains and subspecies of *Bacillus* spp., such as *Bacillus thuringiensis* (Bt) and *Bacillus subtilis*. The control of fungal diseases and pests using pesticides with *Bacillus* as an active ingredient is an opportunity for furthering the development of the agricultural microbials market.

“The soil amendment segment is projected to grow at a CAGR of 12.0% during the forecast period. The development of effective strains of microorganisms, which efficiently cater to the nutrient deficiencies of the soil and improve crop health, are witnessing increased usage as compared to biostimulants in the market.”

Soil amendments are products that are used to improve the structural and biochemical functions of the soil. Presently, a lot of factors are threatening the development of soil conditions in farmlands all over the world, which witness harsh climatic conditions, erosion, degradation, increased toxicity, water runoffs, mining activities, and toxin precipitation and saturation. 25% of the soils in farmlands around the world have already been declared severely deteriorated. Countries are focusing on producing enough food products to at least be able to feed their own populations. For this, they need to increase agricultural output. In this situation, organically managed soils are increasingly imported to heal the damaged soils. Thus, governments are focusing on using organics and biologicals for soil management in farms pre- and post-harvest.

The development of effective strains of microorganisms, such as *Bacillus* spp. and *Rhizobium*, which efficiently cater to the nutrient deficiencies of the soil and improve crop health, are witnessing increased usage as compared to biostimulants in the

market. Farmers are under pressure to increase the outputs in a sustainable manner, and thus, they are looking for more direct alternatives, which are offered by biofertilizers. They also help in increasing the nutrition in food products and attain the goal of eradicating malnutrition, which is an important issue all over the globe.

Break-up of Primaries:

By Value Chain: Demand side - 41%, Supply side – 59%

By Designation: Managers – 24%, CXOs – 31%, and Executives- 45.0%

By Region: Europe - 29%, Asia Pacific – 32%, North America - 24%, RoW – 15%

Leading players profiled in this report:

BASF SE (Germany)

Bayer CropScience (Germany)

FMC Corporation (US)

Syngenta AG (Switzerland)

UPL Ltd. (India)

Corteva Agriscience (US)

Novozymes A/S (Denmark)

Marrone Bio Innovations (US)

Chr. Hansen Holding A/S (Denmark)

Isagro S.p.A. (Italy)

Valent BioSciences (US)

Certis Biologicals (US)

BioWorks, Inc. (US)

Koppert Biological Systems (Netherlands)

Lallemand Inc. (Canada)

AgriLife Biosolutions Ltd. (India)

Wilbur-Ellis Holdings, Inc. (US)

Pivot Bio (US)

Vegalab S.A. (US)

IPL Biologicals (India)

Verdesian Lifesciences (US)

Biotalys (Belgium)

BioLogic Insecticide, Inc. (US)

Provivi (US)

Fytofend S.A. (Belgium)

Research Coverage:

The report segments the agriculture microbials market on the basis of type, function, mode of application, formulation, crop type, and region. In terms of insights, this report has focused on various levels of analyses—the competitive landscape, end-use analysis, and company profiles, which together comprise and discuss views on the emerging & high-growth segments of the agricultural microbials market, high-growth regions, countries, government initiatives, drivers, restraints, opportunities, and challenges.

Reasons to buy this report:

Agricultural Microbials Market by Type, Function (Soil Amendment and Crop Protection), Crop Type (Cereals & Gr...

To get a comprehensive overview of the agricultural microbials market

To gain wide-ranging information about the top players in this industry, their product portfolios, and key strategies adopted by them

To gain insights about the major countries/regions in which the agricultural microbials market is flourishing

Contents

1 INTRODUCTION

1.1 STUDY OBJECTIVES

1.2 MARKET DEFINITION

1.3 STUDY SCOPE

FIGURE 1 MARKET SEGMENTATION

1.3.1 INCLUSIONS AND EXCLUSIONS

1.4 REGIONS COVERED

1.5 YEARS CONSIDERED

1.6 CURRENCY CONSIDERED

TABLE 1 USD EXCHANGE RATES CONSIDERED, 2017–2021

1.7 UNIT CONSIDERED

1.8 STAKEHOLDERS

1.9 SUMMARY OF CHANGES

2 RESEARCH METHODOLOGY

2.1 RESEARCH DATA

FIGURE 2 AGRICULTURAL MICROBIALS MARKET: RESEARCH DESIGN

2.1.1 SECONDARY DATA

2.1.1.1 Key data from secondary sources

2.1.2 PRIMARY DATA

2.1.2.1 Key data from primary sources

2.1.2.2 Key industry insights

2.1.2.3 Breakdown of primary interviews

FIGURE 3 BREAKDOWN OF PRIMARY INTERVIEWS, BY COMPANY TYPE, DESIGNATION, AND REGION

2.2 MARKET SIZE ESTIMATION

2.2.1 MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

FIGURE 4 AGRICULTURAL MICROBIALS MARKET SIZE ESTIMATION (DEMAND-SIDE)

FIGURE 5 AGRICULTURAL MICROBIALS MARKET SIZE ESTIMATION: BOTTOM-UP APPROACH

2.2.2 MARKET SIZE ESTIMATION: TOP-DOWN APPROACH

FIGURE 6 AGRICULTURAL MICROBIALS MARKET SIZE ESTIMATION, BY TYPE (SUPPLY-SIDE)

FIGURE 7 AGRICULTURAL MICROBIALS MARKET SIZE ESTIMATION: TOP-DOWN

APPROACH

2.3 DATA TRIANGULATION

FIGURE 8 DATA TRIANGULATION

2.4 ASSUMPTIONS

TABLE 2 ASSUMPTIONS

2.5 RESEARCH LIMITATIONS AND ASSOCIATED RISKS

TABLE 3 RESEARCH LIMITATIONS AND ASSOCIATED RISKS

3 EXECUTIVE SUMMARY

TABLE 4 AGRICULTURAL MICROBIALS MARKET SHARE, 2022 VS. 2027

FIGURE 9 AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022 VS. 2027 (USD MILLION)

FIGURE 10 AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)

FIGURE 11 AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2022 VS. 2027 (USD MILLION)

FIGURE 12 REGIONAL SNAPSHOT OF AGRICULTURAL MICROBIALS MARKET

4 PREMIUM INSIGHTS

4.1 AGRICULTURAL MICROBIALS MARKET OVERVIEW

FIGURE 13 RISING DEMAND FOR ORGANIC FOOD PRODUCTS TO DRIVE MARKET

4.2 AGRICULTURAL MICROBIALS MARKET: GEOGRAPHIC GROWTH OPPORTUNITIES

FIGURE 14 EUROPEAN COUNTRIES TO WITNESS HIGHER GROWTH DURING FORECAST PERIOD

4.3 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE AND COUNTRY (2021)

FIGURE 15 BACTERIA SEGMENT ACCOUNTED FOR LARGEST MARKET SHARE IN 2021

4.4 AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2022 VS. 2027 (USD MILLION)

FIGURE 16 FOLIAR SPRAY SEGMENT DOMINATES MARKET

4.5 AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022 VS. 2027 (USD MILLION)

FIGURE 17 NORTH AMERICA WILL CONTINUE TO DOMINATE MARKET IN 2027

5 MARKET OVERVIEW

5.1 INTRODUCTION

FIGURE 18 DISTRIBUTION OF ORGANIC AGRICULTURAL LAND, BY REGION, 2020 (MILLION HECTARES)

5.2 MACROECONOMIC INDICATORS

5.2.1 INCREASE IN PRODUCTION OF HORTICULTURAL CROPS

FIGURE 19 AREA HARVESTED FOR FRUIT & VEGETABLE PRODUCTION, 2017–2020 (MILLION HECTARES)

5.2.2 INCREASING USE OF AGRICULTURAL BIOLOGICALS

5.2.3 RELUCTANCE IN ADOPTION OF HARMFUL CHEMICAL PESTICIDES IN DEVELOPED MARKETS

5.3 MARKET DYNAMICS

FIGURE 20 AGRICULTURAL MICROBIALS: MARKET DYNAMICS

5.3.1 DRIVERS

5.3.1.1 Pest proliferation—result of rapid climate change

5.3.1.2 Low development cost of microbials compared to chemical pesticides

5.3.1.3 Target specificity of microbial crop protectants

5.3.1.4 Rising trend of adopting organic farming practices

FIGURE 21 GROWTH OF ORGANIC AGRICULTURAL LAND AND ORGANIC SHARE, 2000–2020 (MILLION HECTARES)

5.3.2 RESTRAINTS

5.3.2.1 Shorter shelf life and complex storage requirements of microbial products

5.3.2.2 Environmental and technological limitations of agricultural microbial products

5.3.2.3 Low awareness among farmers pertaining to biofertilizers and high labor costs

5.3.3 OPPORTUNITIES

5.3.3.1 Microbial products sold by companies

5.3.3.2 Significant developments in seed treatment segment

5.3.3.3 Large-scale investments in R&D by key market players

5.3.4 CHALLENGES

5.3.4.1 Unorganized market and easy availability of low-cost chemical fertilizers that function as substitutes

5.3.4.2 Regulatory barriers

6 INDUSTRY TRENDS

6.1 INTRODUCTION

6.2 REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER

ORGANIZATIONS

TABLE 5 NORTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 6 EUROPE: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 7 ASIA PACIFIC: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 8 SOUTH AMERICA: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

TABLE 9 MIDDLE EAST: REGULATORY BODIES, GOVERNMENT AGENCIES, AND OTHER ORGANIZATIONS

6.3 REGULATORY FRAMEWORK

6.3.1 NORTH AMERICA

6.3.1.1 US

6.3.1.2 Canada

6.3.2 EUROPE

6.3.3 ASIA PACIFIC

6.3.3.1 India

6.3.3.2 China

6.3.3.3 Australia

6.4 PATENT ANALYSIS

FIGURE 22 NUMBER OF PATENTS APPROVED FOR AGRICULTURAL MICROBIALS IN GLOBAL MARKET, 2011–2021

FIGURE 23 JURISDICTIONS WITH HIGHEST PATENT APPROVALS FOR AGRICULTURAL MICROBIALS, 2016–2022

TABLE 10 LIST OF MAJOR PATENTS PERTAINING TO AGRICULTURAL MICROBIALS, 2020–2021

6.5 VALUE CHAIN ANALYSIS

FIGURE 24 VALUE CHAIN ANALYSIS OF AGRICULTURAL MICROBIALS MARKET: SOURCING AND PRODUCTION KEY CONTRIBUTORS

6.6 TRENDS/DISRUPTIONS IMPACTING BUYERS IN AGRICULTURAL MICROBIALS MARKET

FIGURE 25 DEMAND FOR MICROBIALS SUCH AS NITROGEN-FIXING MICROBES TO IMPROVE CROP QUALITY—NEW HOT BET IN MARKET

6.7 MARKET ECOSYSTEM

FIGURE 26 AGRICULTURAL MICROBIALS: ECOSYSTEM VIEW

FIGURE 27 AGRICULTURAL MICROBIALS: MARKET MAP

6.8 TRADE ANALYSIS

TABLE 11 IMPORT VALUE OF BIOFERTILIZERS FOR KEY COUNTRIES, 2021 (USD)

THOUSAND)

TABLE 12 EXPORT VALUE OF BIOFERTILIZERS FOR KEY COUNTRIES, 2021 (USD THOUSAND)

6.9 PRICING ANALYSIS

6.9.1 INTRODUCTION

6.9.2 AVERAGE SELLING PRICE ANALYSIS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD/KG)

FIGURE 28 PRICING ANALYSIS FOR AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD/KG)

6.9.3 AVERAGE SELLING PRICE ANALYSIS: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD/KG)

FIGURE 29 AVERAGE SELLING PRICE ANALYSIS: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD/KG)

6.9.4 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY FUNCTION, 2021 (USD/KG)

FIGURE 30 AVERAGE SELLING PRICE TREND OF KEY PLAYERS, BY FUNCTION, 2021 (USD/KG)

6.10 TECHNOLOGY ANALYSIS

6.10.1 PEPTIDE-BASED PLANT EXTRACT BIOPESTICIDES

6.10.2 TECHNOLOGICAL ADVANCEMENTS FOR LIQUID BIOFERTILIZERS

6.11 CASE STUDY ANALYSIS

6.11.1 USE CASE 1: INCREASE IN DEMAND FOR EASY-TO-USE INOCULANTS BY CONSUMERS

6.11.2 USE CASE 2: UPL LIMITED ANNOUNCED NEW BUSINESS UNIT, NATURAL PLANT PROTECTION (NPP), TO FOCUS ON BIOLOGICAL SOLUTIONS

6.12 KEY CONFERENCES AND EVENTS IN 2022–2023

TABLE 13 AGRICULTURAL MICROBIALS MARKET: DETAILED LIST OF CONFERENCES AND EVENTS

6.13 KEY STAKEHOLDERS AND BUYING CRITERIA

6.13.1 KEY STAKEHOLDERS IN BUYING PROCESS

FIGURE 31 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE MODES OF APPLICATION

TABLE 14 INFLUENCE OF STAKEHOLDERS ON BUYING PROCESS FOR TOP THREE MODES OF APPLICATION

6.13.2 BUYING CRITERIA

FIGURE 32 KEY BUYING CRITERIA FOR TOP THREE MODES OF APPLICATION

TABLE 15 KEY BUYING CRITERIA FOR TOP THREE TYPES OF MODES OF APPLICATION

6.14 PORTER'S FIVE FORCES ANALYSIS

TABLE 16 PORTER'S FIVE FORCES ANALYSIS

- 6.14.1 DEGREE OF COMPETITION
- 6.14.2 THREAT OF NEW ENTRANTS
- 6.14.3 THREAT OF SUBSTITUTES
- 6.14.4 BARGAINING POWER OF SUPPLIERS
- 6.14.5 BARGAINING POWER OF BUYERS
- 6.14.6 INTENSITY OF COMPETITIVE RIVALRY

7 AGRICULTURAL MICROBIALS MARKET, BY FUNCTION**7.1 INTRODUCTION**

FIGURE 33 AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022 VS. 2027 (USD MILLION)

TABLE 17 AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 18 AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 19 AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (KILOTONS)

TABLE 20 AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (KILOTONS)

7.2 SOIL AMENDMENT

7.2.1 DEVELOPMENT OF EFFECTIVE STRAINS OF MICROORGANISMS SUCH AS BACILLUS SPP. AND RHIZOBIUM

TABLE 21 SOIL AMENDMENT: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 22 SOIL AMENDMENT: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 23 SOIL AMENDMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 24 SOIL AMENDMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 25 SOIL AMENDMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (KILOTONS)

TABLE 26 SOIL AMENDMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (KILOTONS)

7.2.2 BIOFERTILIZERS

7.2.2.1 Rising demand for microbials to propel market growth

TABLE 27 BIOFERTILIZERS: AGRICULTURAL MICROBIALS MARKET, BY REGION,

2017–2021 (USD MILLION)

TABLE 28 BIOFERTILIZERS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.2.3 BIOSTIMULANTS

7.2.3.1 Ease of application of biostimulants to drive market growth

TABLE 29 BIOSTIMULANTS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 30 BIOSTIMULANTS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3 CROP PROTECTION

7.3.1 RISING DEMAND FOR ORGANIC PRODUCTS AND GROWING AWARENESS AMONG FARMERS REGARDING SUSTAINABLE FARMING TO DRIVE MARKET

TABLE 31 CROP PROTECTION: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 32 CROP PROTECTION: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 33 CROP PROTECTION: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 34 CROP PROTECTION: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 35 CROP PROTECTION: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (KILOTONS)

TABLE 36 CROP PROTECTION: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (KILOTONS)

7.3.2 BIOINSECTICIDES

7.3.2.1 Highly target-specific actions of bioinsecticides-based products to support market growth

TABLE 37 BIOINSECTICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 38 BIOINSECTICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3.3 BIOFUNGICIDES

7.3.3.1 Development of new and innovative products with various benefits to drive market

TABLE 39 BIOFUNGICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 40 BIOFUNGICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3.4 BIOHERBICIDES

7.3.4.1 Market in development phase with limited products in portfolio of major players

TABLE 41 BIOHERBICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 42 BIOHERBICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3.5 BIONEMATICIDES

7.3.5.1 Market to witness slow growth due to fewer bionematicidal products available
TABLE 43 BIONEMATICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 44 BIONEMATICIDES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

7.3.6 OTHER CROP PROTECTION FUNCTIONS

TABLE 45 OTHER CROP PROTECTION FUNCTIONS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 46 OTHER CROP PROTECTION FUNCTIONS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

8 AGRICULTURAL MICROBIALS MARKET, BY FORMULATION

8.1 INTRODUCTION

FIGURE 34 AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2022 VS. 2027 (USD MILLION)

TABLE 47 AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 48 AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

8.2 LIQUID

8.2.1 EASE OF HANDLING AND MASS APPLICABILITY OF LIQUID-BASED AGRICULTURAL MICROBIALS TO DRIVE OVERALL DEMAND

TABLE 49 LIQUID: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 50 LIQUID: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 51 AGRICULTURAL MICROBIALS MARKET, BY LIQUID FORMULATION, 2017–2021 (USD MILLION)

TABLE 52 AGRICULTURAL MICROBIALS MARKET, BY LIQUID FORMULATION, 2022–2027 (USD MILLION)

8.2.2 SUSPENSION CONCENTRATES (SC)

8.2.2.1 Provide stable suspension when mixed with water

8.2.3 EMULSIFIABLE CONCENTRATES

8.2.3.1 Most common formulation type for crop protection

8.2.4 FLOWABLE LIQUID

8.2.4.1 Minimum damage to plant foliage

8.3 DRY

8.3.1 DRY MICROBIALS LEAST AFFECTED BY SIGNIFICANT INCREASE IN WATER AVAILABILITY

TABLE 53 DRY: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 54 DRY: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 55 AGRICULTURAL MICROBIALS MARKET, BY DRY FORMULATION, 2017–2021 (USD MILLION)

TABLE 56 AGRICULTURAL MICROBIALS MARKET, BY DRY FORMULATION, 2022–2027 (USD MILLION)

8.3.2 WETTABLE POWDER

8.3.2.1 Non-phytotoxicity and prolonged residual activity of wettable powder to drive market

8.3.3 WATER-DISPERSIBLE GRANULES

8.3.3.1 Low survival rate of microbes—major drawback associated with this formulation

9 AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION

9.1 INTRODUCTION

FIGURE 35 AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2022 VS. 2027 (USD MILLION)

TABLE 57 AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 58 AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

9.2 FOLIAR SPRAY

9.2.1 RISING DEMAND FOR HORTICULTURE CROPS TO DRIVE MARKET

TABLE 59 FOLIAR SPRAY: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 60 FOLIAR SPRAY: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.3 SOIL TREATMENT

9.3.1 INCREASING DEMAND FOR ORGANIC FOOD TO SUPPORT MARKET GROWTH

TABLE 61 SOIL TREATMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 62 SOIL TREATMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.4 SEED TREATMENT

9.4.1 HIGH DEMAND FOR SEED COATING IN COMMERCIAL AGRICULTURAL OPERATIONS TO DRIVE MARKET

TABLE 63 SEED TREATMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 64 SEED TREATMENT: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

9.5 OTHER MODES OF APPLICATION

TABLE 65 OTHER MODES OF APPLICATION: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 66 OTHER MODES OF APPLICATION: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

10 AGRICULTURAL MICROBIALS MARKET, BY TYPE

10.1 INTRODUCTION

FIGURE 36 AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 67 AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 68 AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

10.2 BACTERIA

10.2.1 BACILLUS SPP.

10.2.1.1 Bacillus spp. useful for inhibiting growth of fungi

10.2.2 RHIZOBIUM SPP.

10.2.2.1 Rhizobium spp. influences production of metabolites

10.2.3 OTHER BACTERIA

TABLE 69 BACTERIA: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 70 BACTERIA: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

10.3 FUNGI

10.3.1 TRICHODERMA SPP.

10.3.1.1 Trichoderma-based products used in fields, nurseries, and horticulture

10.3.2 MYCORRHIZAL FUNGI

10.3.2.1 Helps enhance crop protection against pathogens

10.3.3 OTHER FUNGI

TABLE 71 FUNGI: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 72 FUNGI: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

10.4 VIRUSES

10.4.1 VIRUS SPECIES FIND WIDE RANGE OF APPLICATION IN BIOCONTROL OF DISEASES AND PESTS AFFECTING ORNAMENTAL PLANTS

TABLE 73 VIRUSES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 74 VIRUSES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

10.5 PROTOZOA

10.5.1 PROTOZOA IMPORTANT IN MINERALIZING NUTRIENTS

TABLE 75 PROTOZOA: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 76 PROTOZOA: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

11 AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE

11.1 INTRODUCTION

FIGURE 37 AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2022 VS. 2027 (USD MILLION)

TABLE 77 AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 78 AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

11.2 CEREALS & GRAINS

TABLE 79 CEREALS & GRAINS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 80 CEREALS & GRAINS: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 81 CEREALS & GRAINS: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 82 CEREALS & GRAINS: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)**11.2.1 CORN**

11.2.1.1 Rise in global corn consumption to drive market

11.2.2 WHEAT

11.2.2.1 Increasing infestation by aphids to result in increased use of microbial crop protection products

11.2.3 RICE

11.2.3.1 High export demand for rice to drive market

11.2.4 OTHER CEREALS & GRAINS**11.3 OILSEEDS & PULSES****TABLE 83 OILSEEDS & PULSES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)****TABLE 84 OILSEEDS & PULSES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)****TABLE 85 OILSEEDS & PULSES: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)****TABLE 86 OILSEEDS & PULSES: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)****11.3.1 SOYBEAN**

11.3.1.1 Infestation from root-knot nematodes severe in soybean crops

11.3.2 SUNFLOWER

11.3.2.1 Preference for sunflower oil and confectionery value of sunflower seed to drive demand

11.3.3 OTHER OILSEEDS & PULSES**11.4 FRUITS & VEGETABLES****TABLE 87 FRUITS & VEGETABLES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)****TABLE 88 FRUITS & VEGETABLES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)****TABLE 89 FRUITS & VEGETABLES: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)****TABLE 90 FRUITS & VEGETABLES: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)****11.4.1 ROOT & TUBER VEGETABLES**

11.4.1.1 Economic losses due to pests, diseases, and nematodes in root & tuber vegetables to support market growth

11.4.2 LEAFY VEGETABLES

11.4.2.1 Susceptibility of leafy vegetables to pathogens such as *Bacillus subtilis*,

Myrothecium verrucaria, and Streptomyces lydicus to drive market

11.4.3 POME FRUITS

11.4.3.1 Effectiveness of biocontrol agents on pome fruits to drive market

11.4.4 BERRIES

11.4.4.1 Rising demand for berries and their susceptibility to pests to drive market

11.4.5 CITRUS FRUITS

11.4.5.1 Vulnerability of citrus fruits to post-harvest decay to drive market

11.4.6 OTHER FRUITS & VEGETABLES

11.5 OTHER CROP TYPES

TABLE 91 OTHER CROP TYPES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 92 OTHER CROP TYPES: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

12 AGRICULTURAL MICROBIALS MARKET, BY REGION

12.1 INTRODUCTION

FIGURE 38 ITALY TO WITNESS HIGHEST GROWTH IN AGRICULTURAL MICROBIALS MARKET DURING FORECAST PERIOD

TABLE 93 AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 94 AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 95 AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (KILOTONS)

TABLE 96 AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (KILOTONS)

12.2 NORTH AMERICA

FIGURE 39 CROP-WISE ORGANICALLY CULTIVATED LAND, 2019 (HECTARES)

FIGURE 40 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET SNAPSHOT

TABLE 97 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 98 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 99 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 100 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 101 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY

FUNCTION, 2017–2021 (KILOTONS)

TABLE 102 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY
FUNCTION, 2022–2027 (KILOTONS)

TABLE 103 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR CROP
PROTECTION, BY TYPE, 2017–2021 (USD MILLION)

TABLE 104 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR CROP
PROTECTION, BY TYPE, 2022–2027 (USD MILLION)

TABLE 105 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR SOIL
AMENDMENT, BY TYPE, 2017–2021 (USD MILLION)

TABLE 106 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR SOIL
AMENDMENT, BY TYPE, 2022–2027 (USD MILLION)

TABLE 107 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY CROP
TYPE, 2017–2021 (USD MILLION)

TABLE 108 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY CROP
TYPE, 2022–2027 (USD MILLION)

TABLE 109 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY MODE
OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 110 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY MODE
OF APPLICATION, 2022–2027 (USD MILLION)

TABLE 111 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY
FORMULATION, 2017–2021 (USD MILLION)

TABLE 112 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY
FORMULATION, 2022–2027 (USD MILLION)

TABLE 113 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE,
2017–2021 (USD MILLION)

TABLE 114 NORTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE,
2022–2027 (USD MILLION)

12.2.1 US

12.2.1.1 Presence of leading companies and rising demand for organic products to
drive market

TABLE 115 US: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021
(USD MILLION)

TABLE 116 US: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027
(USD MILLION)

TABLE 117 US: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD
MILLION)

TABLE 118 US: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD
MILLION)

12.2.2 CANADA

12.2.2.1 Growing number of organic farms to drive demand for biofertilizers and biopesticides

TABLE 119 CANADA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 120 CANADA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 121 CANADA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 122 CANADA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.2.3 MEXICO

12.2.3.1 Growth of commercialized farms and supportive governmental policies to drive market

TABLE 123 MEXICO: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 124 MEXICO: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 125 MEXICO: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 126 MEXICO: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.3 EUROPE

TABLE 127 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 128 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 129 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 130 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 131 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (KILOTONS)

TABLE 132 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (KILOTONS)

TABLE 133 EUROPE: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2017–2021 (USD MILLION)

TABLE 134 EUROPE: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2022–2027 (USD MILLION)

TABLE 135 EUROPE: AGRICULTURAL MICROBIALS MARKET FOR SOIL

AMENDMENT, BY TYPE, 2017–2021 (USD MILLION)

TABLE 136 EUROPE: AGRICULTURAL MICROBIALS MARKET FOR SOIL

AMENDMENT, BY TYPE, 2022–2027 (USD MILLION)

TABLE 137 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE,
2017–2021 (USD MILLION)

TABLE 138 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE,
2022–2027 (USD MILLION)

TABLE 139 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY MODE OF
APPLICATION, 2017–2021 (USD MILLION)

TABLE 140 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY MODE OF
APPLICATION, 2022–2027 (USD MILLION)

TABLE 141 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION,
2017–2021 (USD MILLION)

TABLE 142 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION,
2022–2027 (USD MILLION)

TABLE 143 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY TYPE,
2017–2021 (USD MILLION)

TABLE 144 EUROPE: AGRICULTURAL MICROBIALS MARKET, BY TYPE,
2022–2027 (USD MILLION)

12.3.1 SPAIN

12.3.1.1 Market growth driven by increasing agricultural applications of biopesticides
and semiochemicals

TABLE 145 SPAIN: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2017–2021 (USD MILLION)

TABLE 146 SPAIN: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2022–2027 (USD MILLION)

TABLE 147 SPAIN: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021
(USD MILLION)

TABLE 148 SPAIN: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027
(USD MILLION)

12.3.2 FRANCE

12.3.2.1 Need for sustainable crop production encouraged farmers to opt for organic
practices

TABLE 149 FRANCE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2017–2021 (USD MILLION)

TABLE 150 FRANCE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2022–2027 (USD MILLION)

TABLE 151 FRANCE: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021
(USD MILLION)

TABLE 152 FRANCE: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.3.3 GERMANY

12.3.3.1 Early adoption of EU agricultural standards and policies to drive agricultural microbials market

TABLE 153 GERMANY: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 154 GERMANY: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 155 GERMANY: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 156 GERMANY: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.3.4 ITALY

12.3.4.1 Significant use of microbials in horticulture and development of organic farming practices to support market growth

TABLE 157 ITALY: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 158 ITALY: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 159 ITALY: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 160 ITALY: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.3.5 UK

12.3.5.1 Changing consumer preferences to drive microbial bioinsecticides segment

TABLE 161 UK: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 162 UK: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 163 UK: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 164 UK: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.3.6 REST OF EUROPE

TABLE 165 REST OF EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 166 REST OF EUROPE: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 167 REST OF EUROPE: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 168 REST OF EUROPE: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.4 ASIA PACIFIC

FIGURE 41 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET SNAPSHOT

TABLE 169 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 170 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 171 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 172 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 173 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (KILOTONS)

TABLE 174 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (KILOTONS)

TABLE 175 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2017–2021 (USD MILLION)

TABLE 176 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2022–2027 (USD MILLION)

TABLE 177 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET FOR SOIL AMENDMENT, BY TYPE, 2017–2021 (USD MILLION)

TABLE 178 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET FOR SOIL AMENDMENT, BY TYPE, 2022–2027 (USD MILLION)

TABLE 179 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 180 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

TABLE 181 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 182 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

TABLE 183 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 184 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

TABLE 185 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY TYPE,

2017–2021 (USD MILLION)

TABLE 186 ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY TYPE,
2022–2027 (USD MILLION)

12.4.1 CHINA

12.4.1.1 Efforts to raise sustainable farming practices to support market

TABLE 187 CHINA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2017–2021 (USD MILLION)

TABLE 188 CHINA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2022–2027 (USD MILLION)

TABLE 189 CHINA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021
(USD MILLION)

TABLE 190 CHINA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027
(USD MILLION)

12.4.2 INDIA

12.4.2.1 Supportive efforts of government to promote use of biological products

TABLE 191 INDIA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2017–2021 (USD MILLION)

TABLE 192 INDIA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2022–2027 (USD MILLION)

TABLE 193 INDIA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021
(USD MILLION)

TABLE 194 INDIA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027
(USD MILLION)

12.4.3 JAPAN

12.4.3.1 Rise in food security and quality concerns among population to drive market
for microbials in crop cultivation

TABLE 195 JAPAN: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2017–2021 (USD MILLION)

TABLE 196 JAPAN: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2022–2027 (USD MILLION)

TABLE 197 JAPAN: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021
(USD MILLION)

TABLE 198 JAPAN: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027
(USD MILLION)

12.4.4 AUSTRALIA

12.4.4.1 Well-established and strong market conditions support growth of agricultural
microbials market

TABLE 199 AUSTRALIA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION,
2017–2021 (USD MILLION)

TABLE 200 AUSTRALIA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 201 AUSTRALIA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 202 AUSTRALIA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.4.5 REST OF ASIA PACIFIC

TABLE 203 REST OF ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 204 REST OF ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 205 REST OF ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 206 REST OF ASIA PACIFIC: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.5 SOUTH AMERICA

TABLE 207 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2017–2021 (USD MILLION)

TABLE 208 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY COUNTRY, 2022–2027 (USD MILLION)

TABLE 209 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 210 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 211 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (KILOTONS)

TABLE 212 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (KILOTONS)

TABLE 213 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2017–2021 (USD MILLION)

TABLE 214 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2022–2027 (USD MILLION)

TABLE 215 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR SOIL AMENDMENT, BY TYPE, 2017–2021 (USD MILLION)

TABLE 216 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET FOR SOIL AMENDMENT, BY TYPE, 2022–2027 (USD MILLION)

TABLE 217 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 218 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY CROP

TYPE, 2022–2027 (USD MILLION)

TABLE 219 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 220 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

TABLE 221 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 222 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

TABLE 223 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 224 SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.5.1 ARGENTINA

12.5.1.1 Efforts for conservation of agriculture and sustainable land management to support market

TABLE 225 ARGENTINA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 226 ARGENTINA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

TABLE 227 ARGENTINA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 228 ARGENTINA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

12.5.2 BRAZIL

12.5.2.1 Increasing awareness and adoption of organic methods for cultivation to drive market

TABLE 229 BRAZIL: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 230 BRAZIL: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 231 BRAZIL: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 232 BRAZIL: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.5.3 REST OF SOUTH AMERICA

TABLE 233 REST OF SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 234 REST OF SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET,

BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 235 REST OF SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 236 REST OF SOUTH AMERICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.6 REST OF THE WORLD

TABLE 237 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2017–2021 (USD MILLION)

TABLE 238 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY REGION, 2022–2027 (USD MILLION)

TABLE 239 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 240 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 241 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (KILOTONS)

TABLE 242 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (KILOTONS)

TABLE 243 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2017–2021 (USD MILLION)

TABLE 244 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET FOR CROP PROTECTION, BY TYPE, 2022–2027 (USD MILLION)

TABLE 245 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET FOR SOIL AMENDMENT, BY TYPE, 2017–2021 (USD MILLION)

TABLE 246 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET FOR SOIL AMENDMENT, BY TYPE, 2022–2027 (USD MILLION)

TABLE 247 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2017–2021 (USD MILLION)

TABLE 248 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY CROP TYPE, 2022–2027 (USD MILLION)

TABLE 249 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2017–2021 (USD MILLION)

TABLE 250 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY MODE OF APPLICATION, 2022–2027 (USD MILLION)

TABLE 251 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2017–2021 (USD MILLION)

TABLE 252 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY FORMULATION, 2022–2027 (USD MILLION)

TABLE 253 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY

TYPE, 2017–2021 (USD MILLION)

TABLE 254 REST OF THE WORLD: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.6.1 AFRICA

12.6.1.1 Large number of organic farmers and supportive government policies to widen scope of agricultural microbial industry

TABLE 255 AFRICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 256 AFRICA: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 257 AFRICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 258 AFRICA: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

12.6.2 MIDDLE EAST

12.6.2.1 Focus on increasing agricultural output with sustainable farming practices and organic alternatives

TABLE 259 MIDDLE EAST: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2017–2021 (USD MILLION)

TABLE 260 MIDDLE EAST: AGRICULTURAL MICROBIALS MARKET, BY FUNCTION, 2022–2027 (USD MILLION)

TABLE 261 MIDDLE EAST: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2017–2021 (USD MILLION)

TABLE 262 MIDDLE EAST: AGRICULTURAL MICROBIALS MARKET, BY TYPE, 2022–2027 (USD MILLION)

13 COMPETITIVE LANDSCAPE

13.1 OVERVIEW

13.2 MARKET SHARE ANALYSIS

TABLE 263 AGRICULTURAL MICROBIALS MARKET: DEGREE OF COMPETITION

13.3 STRATEGIES ADOPTED BY KEY PLAYERS

13.4 REVENUE ANALYSIS OF KEY PLAYERS

FIGURE 42 REVENUE ANALYSIS OF KEY PLAYERS IN AGRICULTURAL MICROBIALS MARKET, 2017–2021 (USD BILLION)

13.5 KEY PLAYER EVALUATION QUADRANT

13.5.1 STARS

13.5.2 EMERGING LEADERS

13.5.3 PERVASIVE PLAYERS

13.5.4 PARTICIPANTS

FIGURE 43 AGRICULTURAL MICROBIALS MARKET: COMPANY EVALUATION QUADRANT (KEY PLAYERS), 2022

13.6 COMPANY FOOTPRINT ANALYSIS

TABLE 264 PRODUCT FOOTPRINT OF COMPANIES

TABLE 265 CROP TYPE FOOTPRINT OF COMPANIES

TABLE 266 REGIONAL FOOTPRINT OF COMPANIES

TABLE 267 OVERALL FOOTPRINT OF COMPANIES

13.7 STARTUP/SME EVALUATION QUADRANT

13.7.1 PROGRESSIVE COMPANIES

13.7.2 STARTING BLOCKS

13.7.3 RESPONSIVE COMPANIES

13.7.4 DYNAMIC COMPANIES

FIGURE 44 AGRICULTURAL MICROBIALS MARKET: COMPANY EVALUATION QUADRANT FOR STARTUPS/SMES, 2022

13.8 COMPETITIVE BENCHMARKING

TABLE 268 AGRICULTURAL MICROBIALS MARKET: DETAILED LIST OF KEY STARTUPS/SMES

TABLE 269 AGRICULTURAL MICROBIALS MARKET: COMPETITIVE BENCHMARKING OF KEY STARTUPS/SMES

13.9 COMPETITIVE SCENARIO

13.9.1 PRODUCT LAUNCHES

TABLE 270 PRODUCT LAUNCHES, 2017–2022

13.9.2 DEALS

TABLE 271 DEALS, 2017–2022

13.9.3 OTHER DEVELOPMENTS

TABLE 272 OTHER DEVELOPMENTS, 2017–2022

14 COMPANY PROFILES

14.1 KEY PLAYERS

(Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments)*

14.1.1 BASF SE

TABLE 273 BASF SE: BUSINESS OVERVIEW

FIGURE 45 BASF SE: COMPANY SNAPSHOT

TABLE 274 BASF SE: PRODUCTS OFFERED

TABLE 275 BASF SE: PRODUCT LAUNCHES

TABLE 276 BASF SE: DEALS

14.1.2 BAYER CROPSCIENCE

TABLE 277 BAYER CROPSCIENCE: BUSINESS OVERVIEW

FIGURE 46 BAYER CROPSCIENCE: COMPANY SNAPSHOT

TABLE 278 BAYER CROPSCIENCE: PRODUCTS OFFERED

TABLE 279 BAYER CROPSCIENCE: PRODUCT LAUNCHES

TABLE 280 BAYER CROPSCIENCE: DEALS

14.1.3 FMC CORPORATION

TABLE 281 FMC CORPORATION: BUSINESS OVERVIEW

FIGURE 47 FMC CORPORATION: COMPANY SNAPSHOT

TABLE 282 FMC CORPORATION: PRODUCTS OFFERED

TABLE 283 FMC CORPORATION: PRODUCT LAUNCHES

TABLE 284 FMC CORPORATION: DEALS

14.1.4 SYNGENTA AG

TABLE 285 SYNGENTA AG: BUSINESS OVERVIEW

FIGURE 48 SYNGENTA AG: COMPANY SNAPSHOT

TABLE 286 SYNGENTA AG: PRODUCTS OFFERED

TABLE 287 SYNGENTA AG: PRODUCT LAUNCHES

TABLE 288 SYNGENTA AG: DEALS

14.1.5 UPL

TABLE 289 UPL: BUSINESS OVERVIEW

FIGURE 49 UPL: COMPANY SNAPSHOT

TABLE 290 UPL: PRODUCTS OFFERED

TABLE 291 UPL: PRODUCT LAUNCHES

TABLE 292 UPL: DEALS

14.1.6 CORTEVA AGRISCIENCE

TABLE 293 CORTEVA AGRISCIENCE: BUSINESS OVERVIEW

FIGURE 50 CORTEVA AGRISCIENCE: COMPANY SNAPSHOT

TABLE 294 CORTEVA AGRISCIENCE: PRODUCTS OFFERED

TABLE 295 CORTEVA AGRISCIENCE: DEALS

14.1.7 NOVOZYMES A/S

TABLE 296 NOVOZYMES A/S: BUSINESS OVERVIEW

FIGURE 51 NOVOZYMES A/S: COMPANY SNAPSHOT

TABLE 297 NOVOZYMES A/S: PRODUCTS OFFERED

TABLE 298 NOVOZYMES A/S: DEALS

14.1.8 MARRONE BIO INNOVATIONS, INC.

TABLE 299 MARRONE BIO INNOVATIONS, INC.: BUSINESS OVERVIEW

FIGURE 52 MARRONE BIO INNOVATIONS, INC.: COMPANY SNAPSHOT

TABLE 300 MARRONE BIO INNOVATIONS, INC.: PRODUCTS OFFERED

TABLE 301 MARRONE BIO INNOVATIONS, INC.: PRODUCT LAUNCHES
TABLE 302 MARRONE BIO INNOVATIONS, INC.: DEALS
TABLE 303 MARRONE BIO INNOVATIONS, INC.: OTHER DEVELOPMENTS

14.1.9 CHR. HANSEN HOLDING A/S

TABLE 304 CHR. HANSEN HOLDING A/S: BUSINESS OVERVIEW
TABLE 305 CHR. HANSEN HOLDING A/S: PRODUCTS OFFERED
TABLE 306 CHR. HANSEN HOLDING A/S: DEALS

14.1.10 ISAGRO S.P.A.

TABLE 307 ISAGRO S.P.A.: BUSINESS OVERVIEW
TABLE 308 ISAGRO S.P.A.: PRODUCTS OFFERED
TABLE 309 ISAGRO S.P.A.: DEALS

14.1.11 VALENT BIOSCIENCES LLC

TABLE 310 VALENT BIOSCIENCES LLC: BUSINESS OVERVIEW
TABLE 311 VALENT BIOSCIENCES LLC: PRODUCTS OFFERED
TABLE 312 VALENT BIOSCIENCES LLC: DEALS
TABLE 313 VALENT BIOSCIENCES LLC: OTHER DEVELOPMENTS

14.1.12 CERTIS BIOLOGICALS

TABLE 314 CERTIS BIOLOGICALS: BUSINESS OVERVIEW
TABLE 315 CERTIS BIOLOGICALS: PRODUCTS OFFERED
TABLE 316 CERTIS BIOLOGICALS: PRODUCT LAUNCHES
TABLE 317 CERTIS BIOLOGICALS: OTHER DEVELOPMENTS

14.1.13 BIOWORKS, INC.

TABLE 318 BIOWORKS, INC.: BUSINESS OVERVIEW
TABLE 320 BIOWORKS, INC.: PRODUCT LAUNCHES

14.1.14 KOPPERT BIOLOGICAL SYSTEMS

TABLE 321 KOPPERT BIOLOGICAL SYSTEMS: BUSINESS OVERVIEW
TABLE 322 KOPPERT BIOLOGICAL SYSTEMS: PRODUCTS OFFERED
TABLE 323 KOPPERT BIOLOGICAL SYSTEMS: DEALS

14.2 STARTUPS/SMES/OTHER PLAYERS

14.2.1 LALLEMAND INC.

TABLE 324 LALLEMAND INC.: BUSINESS OVERVIEW
TABLE 325 LALLEMAND INC.: PRODUCTS OFFERED
TABLE 326 LALLEMAND INC.: PRODUCT LAUNCHES

14.2.2 AGRILIFE BIOSOLUTIONS LTD.

TABLE 327 AGRILIFE BIOSOLUTIONS LTD.: BUSINESS OVERVIEW
TABLE 328 AGRILIFE BIOSOLUTIONS LTD.: PRODUCTS OFFERED

14.2.3 WILBUR-ELLIS HOLDINGS, INC.

TABLE 329 WILBUR-ELLIS HOLDINGS, INC.: BUSINESS OVERVIEW
TABLE 330 WILBUR-ELLIS HOLDINGS, INC.: PRODUCTS OFFERED

TABLE 331 WILBUR-ELLIS HOLDINGS, INC.: DEALS

TABLE 332 WILBUR-ELLIS HOLDINGS, INC.: PRODUCT LAUNCHES

14.2.4 PIVOT BIO

TABLE 333 PIVOT BIO: BUSINESS OVERVIEW

TABLE 334 PIVOT BIO: PRODUCTS OFFERED

TABLE 335 PIVOT BIO: DEALS

14.2.5 VEGALAB SA

TABLE 336 VEGALAB SA: BUSINESS OVERVIEW

TABLE 337 VEGALAB SA: PRODUCTS OFFERED

14.2.6 IPL BIOLOGICALS LTD.

TABLE 338 IPL BIOLOGICALS LTD.: BUSINESS OVERVIEW

TABLE 339 IPL BIOLOGICALS LTD: PRODUCTS OFFERED

TABLE 340 IPL BIOLOGICALS LTD.: OTHER DEVELOPMENTS

*Business Overview, Products/Services/Solutions Offered, MnM View, Key Strengths and Right to Win, Strategic Choices Made, Weaknesses and Competitive Threats, Recent Developments might not be captured in case of unlisted companies.

14.2.7 VERDESIAN LIFE SCIENCES

14.2.8 BIOTALYS

14.2.9 BIOLOGIC INSECTICIDE, INC.

14.2.10 PROVIVI

14.2.11 FYTOFEND S.A.

15 ADJACENT AND RELATED MARKETS

15.1 INTRODUCTION

15.2 BIOPESTICIDES MARKET

15.2.1 LIMITATIONS

15.2.2 MARKET DEFINITION

15.2.3 MARKET OVERVIEW

15.2.4 BIOPESTICIDES MARKET, BY SOURCE

TABLE 341 BIOPESTICIDES MARKET, BY SOURCE, 2018–2021 (USD MILLION)

TABLE 342 BIOPESTICIDES MARKET, BY SOURCE, 2022–2027 (USD MILLION)

15.2.5 BIOPESTICIDES MARKET, BY REGION

TABLE 343 BIOPESTICIDES MARKET, BY REGION, 2018–2021 (USD MILLION)

TABLE 344 BIOPESTICIDES MARKET, BY REGION, 2022–2027 (USD MILLION)

15.3 AGRICULTURAL BIOLOGICALS MARKET

15.3.1 LIMITATIONS

15.3.2 MARKET DEFINITION

15.3.3 MARKET OVERVIEW

15.3.4 AGRICULTURAL BIOLOGICALS MARKET, BY FUNCTION

TABLE 345 AGRICULTURAL BIOLOGICALS MARKET, BY FUNCTION, 2017–2020
(USD MILLION)

TABLE 346 AGRICULTURAL BIOLOGICALS MARKET, BY FUNCTION, 2021–2027
(USD MILLION)

15.3.5 AGRICULTURAL BIOLOGICALS MARKET, BY REGION

TABLE 347 AGRICULTURAL BIOLOGICALS MARKET, BY REGION, 2017–2020 (USD
MILLION)

TABLE 348 AGRICULTURAL BIOLOGICALS MARKET, BY REGION, 2021–2027 (USD
MILLION)

15.4 BIOFERTILIZERS MARKET

15.4.1 LIMITATIONS

15.4.2 MARKET DEFINITION

15.4.3 MARKET OVERVIEW

15.4.4 BIOFERTILIZERS MARKET, BY TYPE

TABLE 349 BIOFERTILIZERS MARKET, BY TYPE, 2016–2020 (USD MILLION)

TABLE 350 BIOFERTILIZERS MARKET, BY TYPE, 2021–2026 (USD MILLION)

15.4.5 BIOFERTILIZERS MARKET, BY REGION

TABLE 351 BIOFERTILIZERS MARKET, BY REGION, 2016–2020 (USD MILLION)

TABLE 352 BIOFERTILIZERS MARKET, BY REGION, 2021–2026 (USD MILLION)

16 APPENDIX

16.1 DISCUSSION GUIDE

16.2 KNOWLEDGESTORE: MARKETSANDMARKETS' SUBSCRIPTION PORTAL

16.3 CUSTOMIZATION OPTIONS

16.4 RELATED REPORTS

16.5 AUTHOR DETAILS

About

The report, "Agricultural Microbials Market by Type (bacteria, fungi, virus, and protozoa), Crop Type (Cereals & grains, oilseeds, & pulses, fruit & vegetable) & Region - Global Trends & Forecast to 2019", defines and segments the global market with analyses and projections of the size of the market.

The agricultural microbials market is estimated to worth \$2,182.78 million in 2014, and is projected to reach \$4,556.37 million by 2019, at a CAGR of 15.3%.

The market is segmented and the value is projected on the basis of regions such as North America, Europe, Asia-Pacific, Latin America, and Rest of the World (RoW). Key countries the U.S., Spain, Italy, India, and China are covered and their market is projected for the next 5 years. The market size is projected on the basis of type, crop type, and region. The market for agricultural microbials has a significant impact on crop production. Agricultural microbials are broadly categorized into bacteria, fungi, and others (virus and protozoa) on the basis of microorganism types.

Leading players of the agricultural microbials market include

BASF SE

Bayer CropScience AG

Monsanto

Sumitomo Chemical Co., Ltd.

Syngenta AG

Dow Chemicals

This report focuses on the agricultural microbials market. This research categorizes agricultural microbials on the basis of types, crop type, and region.

On the basis of region, the agricultural microbials market has been segmented as follows:

North America

Europe

Asia-Pacific

Latin America

Rest of the World (RoW)

On the basis of type, the agricultural microbials market has been segmented as follows:

Bacterial

Fungal

Others (virus and protozoa)

On the basis crop type, the agricultural microbials market has been segmented as follows:

- Cereals & grains
- Oilseeds & Pulses
- Fruits & vegetables
- Other crop types (turf, forage, plantation, and ornamental crops)

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