

Agricultural Biotechnology Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Transgenic Crops & Animals, Vaccine Development, Nutritional Supplements, Antibiotic Development, Biofuels, And Flower Culturing), By Organism Type (Plants, Animals, And Microbes) Region and Competition, 2019-2029F

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Abstracts

Global Agricultural Biotechnology Market was valued at USD 96.12 billion in 2023 and is anticipated to project robust growth in the forecast period with a CAGR of 9.11% through 2029. Agricultural biotechnology has become a vital force in addressing global food security challenges amidst climate change and population growth. Major players in this market include multinational corporations, research institutions, and startups. They utilize various biotechnological tools such as genetic modification, genome editing, and trait selection to develop genetically modified organisms (GMOs) and innovative agricultural products. These advancements cover a range of crops, from staple grains like corn, soybean, and rice, to fruits, vegetables, and specialty crops. Engineered traits include resistance to pests, diseases, and herbicides, as well as tolerance to environmental stresses like drought and salinity, and improvements in nutritional content and shelf-life.

The market's growth is driven by the increasing adoption of biotech crops by farmers globally, attracted by promises of higher yields, reduced chemical inputs, and improved profitability. Regulatory frameworks governing biotech crop cultivation and commercialization vary globally, influencing market dynamics and industry strategies.

Agricultural biotechnology extends beyond crop improvement to animal agriculture, where genetic engineering is used for livestock breeding, disease resistance, and pharmaceutical and vaccine production. It also intersects with sectors like biofuels, bio-based materials, and precision agriculture, fostering innovation and diversification within the agricultural industry.

Evolving consumer attitudes and preferences towards biotech products influence market dynamics, with discussions on safety, ethics, and sustainability shaping public discourse. Technological advancements, such as CRISPR-Cas9 gene editing and synthetic biology, promise new opportunities for crop improvement and agricultural innovation. However, the market faces challenges including regulatory hurdles, socio-economic considerations, and concerns over intellectual property rights and technology access. Overall, the Global Agricultural Biotechnology Market represents a dynamic ecosystem driving transformative changes in agriculture while navigating complex scientific, ethical, and regulatory landscapes.

Key Market Drivers

Rising Demand for Sustainable Agriculture

The Global Agricultural Biotechnology Market is experiencing substantial growth driven by increasing demand for sustainable agriculture. This demand surge is fostering innovation, investment, and market expansion. Sustainable agriculture has become a priority for farmers, consumers, policymakers, and businesses due to mounting environmental concerns, resource limitations, and calls for responsible farming practices. Agricultural biotechnology is instrumental in addressing these challenges, making it a key facilitator of sustainable agriculture.

Biotechnology plays a pivotal role in promoting sustainability by developing crops that require fewer chemical inputs, such as pesticides and fertilizers. Through genetic modification and genome editing techniques, biotech firms can engineer crops with inherent resistance to pests and diseases, thereby reducing the need for chemical treatments. This not only cuts production costs for farmers but also mitigates environmental impacts associated with pesticide use, including soil and water contamination, biodiversity loss, and harm to non-target organisms.

Also, biotech crops can be tailored to exhibit traits that enhance resource efficiency, such as drought tolerance and nitrogen use efficiency. By enhancing crops' ability to withstand environmental stresses and utilize nutrients more efficiently, biotechnology

helps farmers optimize yields while minimizing inputs, promoting sustainable farming practices. Additionally, biotech crops can be customized to thrive in specific agroecological conditions, reducing the necessity for land conversion and conserving natural habitats.

The demand for sustainable agriculture is further driven by consumer preferences for environmentally friendly and ethically produced food. Consumers are increasingly seeking products grown using sustainable farming practices, thus boosting market demand for biotech crops with lower environmental footprints. Biotechnology can also be utilized to enhance the nutritional content and quality of crops, aligning with consumer preferences for healthier and more nutritious food options.

Policymakers and regulatory bodies are also acknowledging the importance of sustainable agriculture and are increasingly supportive of biotechnology as a means to achieve sustainability objectives. Regulatory frameworks governing biotech crops are evolving to accommodate advancements in genetic engineering and ensure the safety and sustainability of biotech products. Consequently, biotech companies can expedite the introduction of new products to market, driving further adoption and market expansion.

Advancements in Genetic Engineering

Advancements in genetic engineering are driving significant growth in the Global Agricultural Biotechnology Market. Recent years have seen remarkable progress in genetic engineering techniques, such as CRISPR-Cas9, genome editing, and gene stacking. These advancements have accelerated crop improvement and expanded possibilities for addressing agricultural challenges.

CRISPR-Cas9, in particular, has transformed genetic engineering by providing a precise, efficient, and versatile tool for editing the DNA of organisms. This technology enables targeted modifications to crop genomes, introducing desirable traits with unprecedented accuracy. By editing genes responsible for traits like pest resistance, drought tolerance, and nutritional content, CRISPR-Cas9 facilitates the rapid development of genetically modified organisms (GMOs) with enhanced characteristics. These advancements streamline crop breeding programs, speeding up the introduction of novel traits into agricultural systems.

Genome editing techniques, including CRISPR-Cas9, also offer solutions to traditional breeding barriers, making it possible to modify crops that are challenging to improve

through conventional methods. This includes crops with complex genetic traits or limited genetic variability. Consequently, genetic engineering presents opportunities for enhancing a wider range of crops, including orphan crops, specialty crops, and those grown in challenging environments.

Also, advancements in genetic engineering enable the development of crops with improved nutritional profiles, addressing global malnutrition and food insecurity. Scientists can engineer crops to produce higher levels of essential nutrients, offering potential solutions to prevalent nutritional deficiencies. For example, biofortified crops enriched with vitamins and minerals hold promise for combating micronutrient deficiencies and improving public health outcomes. The rapid pace of advancements in genetic engineering is expanding researchers' toolkit and driving investment and innovation in the agricultural biotechnology market.

Growing Global Population and Food Security Concerns

The expansion of the Global Agricultural Biotechnology Market is primarily driven by the growing global population and escalating food security concerns. With projections indicating a population nearing 10 billion by 2050, ensuring a sustainable and adequate food supply has become an urgent priority. Agricultural biotechnology offers innovative solutions to tackle the challenges posed by population growth, climate change, and limited arable land.

Biotechnology plays a critical role in enhancing crop productivity and resilience, thus boosting global food production capacity. Through genetic modification, genome editing, and trait selection, biotech companies develop crops with improved yield potential, resistance to pests and diseases, and tolerance to environmental stresses like drought, heat, and salinity. These genetically modified organisms (GMOs) can thrive in various agroecological conditions, enabling farmers to increase food production on existing agricultural lands while minimizing inputs and conserving natural resources.

Also, biotechnology presents opportunities to enhance the nutritional quality and safety of food crops, addressing malnutrition and improving public health outcomes worldwide. Scientists engineer crops to produce higher levels of essential vitamins, minerals, and nutrients, offering potential solutions to prevalent micronutrient deficiencies. Additionally, biotech crops can be designed to reduce the presence of harmful substances such as mycotoxins and allergens, enhancing food safety and quality. As food demand continues to surpass supply, particularly in developing regions experiencing rapid population growth, there is a growing acknowledgment of

biotechnology's role in addressing food security challenges. Governments, international organizations, and private sector stakeholders are investing in agricultural biotechnology research, infrastructure, and capacity building initiatives to promote sustainable food production and distribution systems. Furthermore, regulatory frameworks governing biotech crop cultivation and commercialization are evolving to facilitate faster approvals and market access, encouraging innovation and investment in the agricultural biotechnology sector.

Key Market Challenges

Regulatory Complexity and Uncertainty

One of the primary challenges facing the Global Agricultural Biotechnology Market is the complex and often unpredictable regulatory landscape governing the cultivation and commercialization of biotech crops. Regulatory approval processes vary widely across countries and regions, leading to lengthy timelines and significant costs for bringing new biotech products to market. Additionally, regulatory requirements may change over time, further complicating market access and investment decisions. Harmonizing regulatory frameworks and improving transparency and predictability in the regulatory process are essential for fostering innovation and facilitating market growth.

Public Perception and Consumer Acceptance

Public perception and consumer acceptance of biotech crops remain significant challenges for the agricultural biotechnology market. Despite the scientific consensus on the safety and benefits of genetically modified organisms (GMOs), there is widespread skepticism and opposition among certain segments of the population. Misinformation, fearmongering, and ideological biases contribute to negative perceptions of biotechnology, leading to consumer mistrust and reluctance to embrace biotech products. Educating the public about the science behind agricultural biotechnology, addressing concerns about safety and environmental impact, and promoting transparent communication are critical for building trust and fostering acceptance of biotech crops.

Intellectual Property Rights and Access to Technology

Intellectual property rights (IPR) and access to technology present significant challenges for the agricultural biotechnology market, particularly in developing countries. Biotech companies invest heavily in research and development to develop

new crop traits and technologies, often securing patents to protect their intellectual property. However, the high cost of licensing patented technologies and restrictive intellectual property regimes can limit access to biotech innovations, especially for smallholder farmers in low-income countries. Balancing the need for innovation and profitability with the goal of ensuring equitable access to technology is essential for promoting sustainable and inclusive agricultural development.

Key Market Trends

Adoption of Digital Agriculture Technologies

The adoption of digital agriculture technologies is revolutionizing the Global Agricultural Biotechnology Market, driving innovation, efficiency, and sustainability throughout the agricultural value chain. Digital agriculture encompasses a wide range of technologies, including precision farming, remote sensing, data analytics, and artificial intelligence, all of which are transforming the way crops are grown, managed, and monitored. One of the key ways digital agriculture is boosting the agricultural biotechnology market is through precision farming techniques. Precision farming utilizes advanced technologies such as GPS, sensors, and drones to collect real-time data on soil conditions, weather patterns, and crop health. This data allows farmers to make informed decisions about planting, irrigation, fertilization, and pest management, optimizing resource use and maximizing crop yields. By integrating biotechnology with precision farming, farmers can leverage genetically modified crops tailored to specific environmental conditions, further enhancing productivity and sustainability.

Remote sensing technologies are also playing a crucial role in driving the adoption of digital agriculture and fueling the growth of the agricultural biotechnology market. Satellite imagery, aerial photography, and drones equipped with multispectral cameras enable farmers to monitor crop growth, detect pests and diseases, and assess field conditions with unprecedented accuracy and granularity. By analyzing this data, farmers can identify areas of concern, implement targeted interventions, and optimize crop management practices, leading to improved yields and reduced environmental impact.

Furthermore, data analytics and artificial intelligence are transforming agriculture by providing farmers with powerful tools for decision-making and optimization. Advanced algorithms can analyze vast amounts of data collected from various sources, including sensors, satellites, and historical records, to generate actionable insights and predictive models. These insights enable farmers to optimize planting schedules, predict crop yields, and identify opportunities for improvement, driving efficiency and profitability.

Additionally, artificial intelligence algorithms can accelerate the development of biotech crops by analyzing genomic data, predicting gene functions, and guiding breeding programs, leading to the rapid development of novel crop varieties with desirable traits.

Increasing Focus on Health and Nutrition

The increasing focus on health and nutrition is playing a pivotal role in boosting the Global Agricultural Biotechnology Market, driving demand for genetically modified crops with enhanced nutritional profiles. As awareness grows about the critical link between diet and health, consumers are seeking foods that not only satisfy hunger but also provide essential nutrients for optimal health and wellness. Agricultural biotechnology offers innovative solutions to address nutritional deficiencies and improve public health outcomes worldwide.

One of the keyways in which agricultural biotechnology is contributing to improved health and nutrition is through the development of biofortified crops. Biofortification involves enhancing the nutritional content of crops through genetic modification or breeding techniques. Biotech companies are engineering crops to produce higher levels of essential vitamins, minerals, and other nutrients, addressing deficiencies that affect billions of people globally. For example, vitamin A-enriched rice, iron-fortified beans, and zinc-enhanced wheat are biofortified crops that offer promising solutions to nutrient deficiencies prevalent in many parts of the world.

Furthermore, agricultural biotechnology is enabling the development of crops with improved nutritional quality and safety. By leveraging genetic engineering techniques, scientists can enhance the nutritional value of crops by increasing levels of beneficial compounds such as antioxidants, phytochemicals, and omega-3 fatty acids. Additionally, biotech crops can be engineered to reduce the presence of harmful substances such as mycotoxins and allergens, enhancing food safety and quality. These advancements in crop biotechnology contribute to healthier and more nutritious food options for consumers, promoting better overall health and well-being.

Moreover, agricultural biotechnology plays a crucial role in addressing specific health challenges, such as malnutrition and micronutrient deficiencies, particularly in developing countries. By developing genetically modified crops with targeted nutritional traits, biotech companies are helping to combat hunger, improve childhood development, and prevent chronic diseases associated with nutrient deficiencies. These efforts align with global initiatives such as the Sustainable Development Goals and the Scaling Up Nutrition Movement, which aim to eliminate hunger and malnutrition.

Segmental Insights

Application Insights

Based on the application, transgenic crops & animals segment emerged as the dominant segment in the global agricultural biotechnology market in 2023. As consumers prioritize health and wellness and governments invest in nutrition-sensitive agriculture, the market for biofortified crops and genetically modified foods is expected to continue expanding. Biotech companies that innovate and collaborate to develop crops that address nutritional needs and improve public health outcomes will be well-positioned to capitalize on this trend and drive further market growth and innovation.

Organism Type Insights

Based on the organism type, plants segment emerged as the dominant segment in the global agricultural biotechnology market in 2023. Transgenic crops and animals offer a wide range of benefits to farmers, including improved yield, resistance to pests and diseases, and enhanced nutritional content. By incorporating genes from other species or through genetic modification, transgenic crops can exhibit traits such as herbicide tolerance, insect resistance, and drought tolerance, making them more resilient and productive in challenging environmental conditions. Similarly, transgenic animals can be engineered for traits such as faster growth, increased disease resistance, and improved meat quality, offering significant advantages to livestock producers.

Regional Insights

North America emerged as the dominant player in the global agricultural biotechnology market in 2023, holding the largest market share. North America has a highly developed agricultural sector with advanced infrastructure, extensive research and development capabilities, and a favorable regulatory environment. Countries such as the United States and Canada have long been at the forefront of agricultural innovation, investing heavily in biotechnology research, education, and industry collaboration. The presence of leading biotech companies, research institutions, and universities in North America further strengthens the region's position as a global hub for agricultural biotechnology.

Key Market Players

ADAMA

Corteva, Agriscience.

Evogene Ltd.

KWS SAAT SE & Co. KGaA

Bayer AG

Pro Farm Group Inc.

MITSUI & CO., LTD

Limagrain

Nufarm Limited

Valent BioSciences LLC

Report Scope:

In this report, the Global Agricultural Biotechnology Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

Agricultural Biotechnology Market, By Application:

Transgenic Crops & Animals

Vaccine Development

Nutritional Supplements

Antibiotic Development

Biofuels

Flower Culturing

Agricultural Biotechnology Market, By Organism Type:

Plants

Animals

Microbes

Agricultural Biotechnology Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Agricultural Biotechnology Market.

Available Customizations:

Global Agricultural Biotechnology Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

Detailed analysis and profiling of additional market players (up to five).

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