

Agricultural Microbials Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Bacterial, Fungi, Virus, Protozoa), By Function (Soil Amendments and Crop Protection), By Formulation (Dry and Liquid), By Mode of Application (Foliar Spray, Soil Treatment, Seed Treatment, Others), By Crop Type (Cereals & Grains, Oilseeds & Pulses, Fruits & Vegetables, Others), By Region and Competition

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Abstracts

Global Agricultural Microbials Market was valued at USD 6.12 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 8.64% through 2028. Agricultural microbials, also known as agricultural bio stimulants, are a diverse group of microorganisms that play a crucial role in enhancing crop productivity and improving the quality of yield. These microorganisms encompass a wide range of species including bacteria, archaea, yeasts, molds, algae, protozoa, and even viruses.

By harnessing the power of these microorganisms, farmers and agricultural practitioners are able to bolster crops' ability to withstand various environmental stressors. These can include extreme temperatures, ultraviolet (UV) radiation, salinity, floods, drought, and even damage caused by insects, herbivores, nematodes, fungi, bacteria, or weeds. Furthermore, agricultural microbials have been found to actively contribute to the promotion of plant growth by facilitating the availability of vital nutrients, such as phosphorous and nitrogen, through their interactions with the plant's root system. In addition, they play a crucial role in maintaining a balanced hormonal profile within plants, producing stress-protective compounds, and mitigating the incidence of various

plant diseases.

Key Market Drivers

Shift Towards Organic Farming & Sustainable Agricultural Practices

The global shift towards organic farming and sustainable agricultural practices is expected to significantly increase the demand for agricultural microbials. As the harmful environmental impacts of synthetic fertilizers and pesticides become more evident, farmers worldwide are seeking greener alternatives. Agricultural microbials, which involve beneficial bacteria, fungi, and other microorganisms, are a natural solution that promotes plant health and growth without the detrimental environmental fallout. By integrating these microbials into farming practices, producers can improve crop yield and quality while decreasing their reliance on harmful chemical inputs. Moreover, as consumers increasingly demand organically grown and ecologically responsible products, the use of agricultural microbials aligns with market trends and regulatory pressures. Countries around the globe are implementing more stringent regulations on chemical pesticide use, further propelling the shift towards bio-based solutions. In addition, the adaptability of microbials to various climate conditions and crop types broadens their applicability, heightening their global demand. Therefore, the move towards sustainable agriculture, coupled with consumer and regulatory preferences, is set to boost the global demand for agricultural microbials.

Advancements in Microbial Research & Biotechnology

Advancements in microbial research and biotechnology are set to significantly boost the global demand for agricultural microbials. Cutting-edge research in microbiology has led to the discovery of novel microorganisms that are beneficial for crop growth, and innovations in biotechnology have enabled the manipulation and optimal usage of these microorganisms for agricultural purposes. The use of these agricultural microbials can lead to improved crop yield and resilience, especially in the face of changing climate conditions and increasing cases of plant diseases. Additionally, they provide a sustainable alternative to traditional chemical fertilizers, aligning with the global trend towards organic farming and environmentally friendly agricultural practices. As such, the combination of scientific breakthroughs in microbial research and the growing emphasis on sustainable agriculture is anticipated to escalate the demand for agricultural microbials on a global scale. Furthermore, initiatives by governments and international organizations to promote the use of environmentally friendly agricultural solutions are expected to provide additional impetus to the market growth. Thus, the future of global

agriculture is set to be significantly influenced by developments in the field of microbial research and biotechnology.

Government Initiatives Promoting the Use of Agricultural Microbials

Government-led initiatives to promote the use of agricultural microbials have significantly contributed to the surge in global demand. These microbials, which include bacteria, fungi, and viruses, play a crucial role in improving crop yield, enhancing soil fertility, and reducing the reliance on chemical fertilizers by facilitating natural nutrient uptake. Governments worldwide are recognizing this potential and are implementing policies that encourage farmers to adopt microbial-based agricultural practices. For instance, subsidies are offered for the purchase of microbial products, and extensive educational campaigns are rolled out to raise awareness about their benefits. Moreover, the governmental push towards sustainable farming practices and organic food production further amplifies the demand. In regions where agriculture is a critical part of the economy, the adoption of agricultural microbials can lead to increased productivity and improved food security. Consequently, these combined efforts are expected to catalyze the global demand for agricultural microbials, altering the dynamics of modern farming practices.

Growing Resistance of Pests to Chemical Pesticides

The escalating resistance of pests to chemical pesticides is posing a significant and pressing challenge to global agriculture. As a result, there is an increasing tilt towards innovative and sustainable alternatives that can effectively combat this issue. One such solution gaining traction is the use of agricultural microbials, which encompass a diverse range of beneficial organisms such as bacteria and fungi. These microorganisms play a vital role in enhancing crop productivity, protecting plants from potential diseases and pests, and promoting overall plant health. By harnessing the power of nature, agricultural microbials offer a compelling and eco-friendly approach to pest control.

The growing pesticide resistance has rendered traditional agrochemical-based solutions less effective, leading to a surge in global demand for microbial products. Agricultural microbials, with their natural composition and reduced harm to the environment, are emerging as a promising alternative for sustainable pest management. Moreover, the adoption of bio-based solutions aligns with heightened ecological concerns and regulatory restrictions associated with the use of chemical pesticides. This shift towards agricultural microbials not only addresses the immediate challenge of pest resistance but also contributes to a more environmentally conscious and efficient approach to

global agriculture.

Key Market Challenges

Lack of Advanced Technologies for Microbial Inoculants

The global agricultural microbials market is anticipated to experience a decline in demand due to the lack of advanced technologies for microbial inoculants. Microbial inoculants are pivotal in promoting plant growth, enhancing crop yield, and improving soil health. However, their widespread application is hindered by the absence of sophisticated technologies for their production and application. Traditional techniques often result in the loss of microorganism viability, reducing the overall effectiveness of these inoculants. Additionally, the lack of controlled release technologies hampers the inoculants' longevity in soil, necessitating frequent applications which is both time-consuming and costly for farmers. Furthermore, the inability to uniformly distribute these inoculants across large agricultural tracts with current technologies limits their impact on a broad scale. Limited understanding of microbe-plant interactions and the complexity of soil microbial ecosystems also trigger challenges in the development and usage of microbial inoculants. These technological deficiencies not only impede the growth of agricultural microbials market but also restrict the potential benefits that could be leveraged from these bio-based solutions in sustainable farming practices worldwide. Therefore, the dearth of advanced technologies for microbial inoculants is expected to negatively impact the global demand for agricultural microbials.

Lack of Awareness Among Farmers

The global demand for agricultural microbials is expected to be negatively affected by a prevalent lack of awareness among farmers. Many farmers, particularly in developing and underdeveloped regions, are still unaware of the potential benefits of these microbials in enhancing crop yields and improving soil fertility. Consequently, their adoption of this innovative solution remains minimal. This limited knowledge is exacerbated by insufficient outreach and education initiatives from governments and agricultural bodies to foster understanding of the value of microbials in sustainable farming. Moreover, erroneous beliefs and misconceptions about the safety and efficacy of microbials persist, further dissuading farmers from their use. The lack of proper distribution channels and the cost implications of adopting these agricultural innovations also deter many farmers. As a result of these combined factors, the global demand for agricultural microbials is likely to stagnate or decline, unless substantive action is taken to remedy this knowledge gap and improve farmers' accessibility to and comprehension

of these beneficial products.

Key Market Trends

Increase in Investment in Agricultural R&D

Investment in agricultural Research and Development (R&D) plays a crucial role in boosting the global demand for Agricultural Microbials. As growing populations and climate change pose significant challenges to the agricultural sector, driving the need for more resilient and sustainable farming practices, the role of Agricultural Microbials becomes increasingly significant. These microorganisms assist in enhancing crop productivity, soil fertility, and plant health, ultimately contributing to sustainable agriculture. An increase in R&D investments signifies an increase in innovative solutions and enhanced microbial products. These cutting-edge solutions can better adapt to various soil types and climatic conditions, improving crop yield and resilience. Furthermore, R&D investments often lead to advancements in biopesticides, biofertilizers, and bio-stimulants, which translate to a decrease in synthetic pesticide usage and a step towards environmentally friendly farming. As such, increased investment in agricultural R&D is anticipated to stimulate the global demand for Agricultural Microbials, driving market growth and contributing towards a more sustainable future for agriculture.

Expansion of Agricultural Sectors in Emerging Economies

The global agricultural sector is witnessing a significant shift as emerging economies intensify their farming practices in an effort to meet the rising demand for food. This expansion of agricultural sectors is expected to fuel a global surge in the demand for agricultural microbials. Agricultural microbials, comprising bacteria, fungi, viruses, and other microorganisms, play a crucial role in improving crop yield and soil fertility, acting as a sustainable alternative to chemical fertilizers. In emerging economies, the demand for these microbials is heightened by factors such as the growing population, increased awareness of sustainable farming practices, and government initiatives supporting the use of eco-friendly farming solutions. The integration of microbials in farming is also propelled by the need to combat the adverse environmental impact of traditional agricultural practices, such as soil degradation and loss of biodiversity. Furthermore, the rise of precision agriculture fueled by technological advancements is expected to facilitate the efficient use of microbials. As a result, the global agricultural microbials market is poised for substantial growth, driven by the escalating demand from expanding agricultural sectors in emerging economies.

Segmental Insights

Type Insights

Based on the Type, the bacterial segment accounted for the largest revenue in 2022, primarily due to its extensive use in formulating bio-pesticides, bio-fertilizers, and bio-stimulants. Bacteria play a crucial role in promoting growth by effectively addressing root-fungus diseases. Abundant strains of bacteria are readily available in the environment and soil. The market is expected to witness increased adoption of fungi, driven by their positive impact on germination, yield, and flowering. Fungi can establish symbiotic associations with plant roots, enhancing nutrient uptake. Additionally, certain fungi act as bio-control agents, suppressing plant pathogens and improving soil health. Moreover, fungi contribute to the decomposition of organic matter, facilitating nutrient cycling in ecosystems.

In precision agriculture, specific viruses are used as bio-pesticides to target pests and minimize environmental impact. This approach provides a targeted and environmentally friendly means of pest control in crop management systems. Viruses can be engineered or selected based on their ability to infect specific pests, resulting in reduced pest populations. Furthermore, researchers continue to explore and develop new virus-based solutions to enhance their practicality in agriculture.

Crop Type Insights

Based on the Crop Type, the cereals and grains segment held the largest revenue share in 2022, primarily due to factors such as improved nutrient availability, enhanced plant growth, disease suppression, and sustainable agricultural practices. These microorganisms are capable of stimulating the growth of cereals and grains by producing growth hormones, facilitating nutrient uptake, and enhancing root architecture, leading to increased crop yields and improved plant resilience. Moreover, specific microorganisms act as bio-pesticides, offering protection against insect pests that can adversely affect cereals and grains. For instance, the bacterium *Bacillus thuringiensis* (Bt) produces toxins that are lethal to certain pests, thereby reducing the need for chemical pesticides.

The global demand for high-value crops, including fruits and vegetables, is on the rise due to their associated remuneration factors. Agricultural microbes play a crucial role in providing essential nutrients to these crops. The increasing demand for organic fruits

and vegetables is expected to drive the utilization of microbials in their cultivation. Additionally, microbials contribute significantly to the breakdown of organic matter and the release of nutrients, thereby improving nutrient availability in the soil and promoting plant growth. Some microbial inoculants can also enhance the stress tolerance of oilseeds and pulses, enabling them to withstand environmental challenges such as drought or salinity. This is particularly beneficial for crops cultivated in regions with diverse climatic conditions. Application of these microorganisms as seed coatings or soil amendments during planting ensures their proximity to the emerging roots, maximizing their positive impact on early plant growth and development.

Regional Insights

The North American region emerged as the market leader in 2022, generating the highest revenue, and is projected to maintain its position in the foreseeable future. This can be attributed to the increasing awareness among farmers about the environmental advantages of microbial products, the growing demand for high-value crops, and the adoption of organic farming practices in several North American countries.

Europe is expected to hold the second-largest share in the global agricultural market during the analysis period, primarily due to the rapid expansion of organic farming. The strict regulations on harmful chemical products have led to a preference for Agricultural Microbials, consequently driving the demand in this market. Significant market growth is anticipated in the Asia Pacific region throughout the projected period. The rising awareness regarding the benefits of Agricultural Microbials products is poised to fuel the market in the APAC region. Notably, India and China play a crucial role as major contributors to this growth.

Key Market Players

BASF SE

Bayer Crop Science

Syngenta AG

Certis USA LLC

Marrone Bio Innovations, Isagro S.p.A

Verdesian Life Sciences LLC

Valent Biosciences LLC

Lallemand Plant Care

Agrilife Biosolutions Ltd.

Novozymes A/S

Report Scope:

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

Agricultural Microbials Market, By Type:

Bacterial

Fungi

Virus

Protozoa

Agricultural Microbials Market, By Function:

Soil Amendments

Crop Protection

Agricultural Microbials Market, By Formulation:

Dry

Liquid

Agricultural Microbials Market, By Mode of Application:

Foliar Spray

Soil Treatment

Seed Treatment

Others

Agricultural Microbials Market, By Crop Type:

Cereals & Grains

Oilseeds & Pulses

Fruits & Vegetables

Others

Agricultural Microbials 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

Competitive Landscape

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

Available Customizations:

Global Agricultural Microbials market report with the given market data, Tech Sci

Agricultural Microbials Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Seg...

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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