

# **Biocontrol Market – Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Product Type (Microbials, Macrobials, Biochemicals), By Function (Bioinsecticides, Biofungicides, Bionematicides, Bioherbicides, Others), By Mode of Treatment (Soil Treatment, Seed Treatment, Foliar Spray, Post-harvest, Others), By Crop Type (Grains and Cereals, Oilseeds and Pulses, Fruits and Vegetables, Others), By Region and Competition, 2019-2029F**

<https://marketpublishers.com/r/BA60FA092C04EN.html>

Date: July 2024

Pages: 182

Price: US\$ 4,900.00 (Single User License)

ID: BA60FA092C04EN

## **Abstracts**

Global Biocontrol Market was valued at USD 3.77 Billion in 2023 and is anticipated to witness an impressive growth in the forecast period with a CAGR of 8.07% through 2029. Biocontrol, short for biological control, is a method of managing pests and diseases in agriculture, forestry, and other ecosystems using living organisms or naturally derived substances. The primary goal of biocontrol is to regulate pest populations in a targeted and environmentally sustainable manner. Unlike chemical pesticides, biocontrol methods rely on the use of beneficial organisms, such as predators, parasitoids, pathogens, or competitors, to control pests. Biocontrol is often integrated into a broader approach known as Integrated Pest Management (IPM). IPM combines biological, cultural, physical, and chemical methods to manage pests in a sustainable and economically viable manner. Biocontrol is considered environmentally friendly because it reduces reliance on chemical pesticides, minimizing negative impacts on ecosystems, non-target species, and human health. It aligns with principles of sustainable agriculture by promoting natural processes and biodiversity.

Increasing awareness of environmental sustainability and the need for reduced chemical inputs in agriculture are driving the demand for biocontrol products. Consumers and farmers are seeking sustainable and eco-friendly alternatives to conventional agrochemicals. Supportive regulatory frameworks that encourage the use of biocontrol agents and integrated pest management (IPM) practices play a significant role in driving the market. Regulatory incentives and approvals for biocontrol products contribute to market growth. Growing concerns about the residues of chemical pesticides in food products have led to a shift in consumer preferences. Biocontrol methods offer a solution by providing residue-free or low-residue crops, contributing to increased demand. Continuous advancements in biotechnology and genetic engineering contribute to the development of more effective and targeted biocontrol solutions. Innovations in the formulation and delivery of biocontrol agents enhance their efficacy. The expansion of organic farming practices, driven by consumer demand for organic products, has boosted the demand for biocontrol solutions. Biocontrol methods align well with organic farming principles, supporting the growth of the market.

## Key Market Drivers

### Rising Concerns About Chemical Pesticide Residues

Consumers are becoming more health-conscious and are concerned about the potential negative impacts of chemical pesticide residues on their health. This awareness drives demand for food products that are produced using methods with minimal or no chemical residues. Biocontrol methods offer a more sustainable and environmentally friendly approach to pest management, resulting in food products with lower chemical residues. This aligns with the growing demand for safe, high-quality, and nutritious food. Regulatory bodies are increasingly imposing stringent limits on the allowable residues of chemical pesticides in food products. This regulatory environment creates a favorable climate for the adoption of biocontrol solutions that inherently produce crops with lower residue levels. Many export markets have strict regulations and standards concerning the maximum allowable levels of chemical residues in agricultural products. To comply with these requirements and access global markets, farmers and producers are turning to biocontrol methods.

The environmental impact of chemical pesticides, including soil and water contamination, has raised ecological concerns. Biocontrol methods, being more environmentally friendly, are sought after as a sustainable alternative that reduces the

overall ecological footprint of agriculture. The demand for organic and specialty crops has been on the rise, and these markets often have stringent standards regarding pesticide residues. Biocontrol methods are a preferred choice for organic farming practices, supporting the growth of this sector. Public perception plays a crucial role in shaping market demands. The negative perception of chemical pesticides, coupled with increasing trust in biocontrol methods, leads to a shift in consumer preferences toward products with reduced chemical residues.

Integrated Pest Management (IPM) practices, which involve the combined use of various pest control methods, including biocontrol, are gaining popularity. This approach helps to minimize the reliance on chemical pesticides, resulting in crops with fewer residues. The broader global push towards sustainable agriculture includes reducing the environmental impact of conventional farming practices. Biocontrol methods contribute to achieving sustainability goals by offering effective pest management with reduced chemical inputs. Concerns about the development of resistance in pests to chemical pesticides have led to the exploration of alternative pest control strategies. Biocontrol methods provide a valuable tool in managing resistance issues and maintaining the efficacy of pest management. This factor will help in the development of the Global Biocontrol Market.

### Growing Organic Farming Practices

Organic farming relies on practices that minimize the use of synthetic chemicals, including pesticides. Biocontrol methods align with organic certification standards, making them a preferred choice for pest management in organic agriculture. Consumer preferences for organic and sustainably produced food have been steadily increasing. Biocontrol products are integral to organic farming practices, meeting consumer expectations for environmentally friendly and chemical-free agricultural products. Organic farming regulations often prohibit or restrict the use of synthetic pesticides. This restriction creates a demand for alternative pest control methods, making biocontrol agents a natural fit for organic farming systems.

Biocontrol methods are considered environmentally friendly and sustainable. Organic farmers prioritize practices that promote soil health, biodiversity, and overall ecosystem balance, making biocontrol a key component of their integrated pest management strategies. Organic farming places a strong emphasis on soil health and fertility. Biocontrol agents, which are often introduced into the soil, contribute to maintaining a balanced and healthy soil ecosystem, aligning with the principles of organic agriculture. Organic farming seeks to minimize the environmental impact of

agricultural practices. Biocontrol methods, being inherently less harmful to the environment compared to chemical pesticides, contribute to the overall sustainability of organic farming.

Organic certification bodies set strict guidelines for pest management practices. Biocontrol methods, which are compatible with organic principles, help farmers meet these requirements and obtain organic certification. Biocontrol methods contribute to the production of crops with fewer chemical residues and improved nutritional profiles. The emphasis on high-quality, nutrient-dense produce in organic farming aligns with the benefits offered by biocontrol. Access to organic markets and the ability to command premium prices for organic products drive the adoption of biocontrol methods. Farmers engaging in organic farming practices recognize the economic incentives associated with meeting the growing demand for organic produce. Extension programs, educational initiatives, and government support for organic farming practices contribute to the awareness and adoption of biocontrol methods among organic farmers. This factor will pace up the demand of the Global Biocontrol Market

#### Advancements in Biotechnology and Genetic Engineering

Biotechnological innovations have led to the development of improved formulations for biocontrol agents. Enhanced delivery systems, such as encapsulation and microencapsulation technologies, help increase the stability and effectiveness of biocontrol products, improving their application in the field. Genetic engineering allows for the modification of biocontrol agents to enhance their specificity and efficacy. This precision allows for targeted control of pests while minimizing non-target effects, providing a more sustainable and environmentally friendly solution. Genetic modifications enable the incorporation of specific traits into biocontrol agents, such as increased tolerance to environmental conditions, extended activity periods, or improved resistance to pests and diseases. This enhances the overall performance of biocontrol products. Biotechnological advancements have facilitated the development of transgenic plants that express certain traits conferring resistance to pests. These genetically modified crops can act as biocontrol tools by reducing the susceptibility of the crop to specific pests.

Genetic engineering allows for the enhancement of host plant resistance against pests. Biocontrol strategies can be integrated with plant genetics to create crops that are inherently more resilient to pest attacks, reducing the reliance on external biocontrol agents. Biotechnological tools, including genomics and proteomics, aid in the identification, characterization, and optimization of biocontrol agents. This allows

researchers understand the mechanisms underlying their effectiveness and optimize their performance in the field. RNA interference technologies have been leveraged to silence specific genes in pests, disrupting their vital processes. This approach can be utilized in conjunction with biocontrol agents to enhance their efficacy and provide a targeted solution to pest-related issues.

The introduction of engineered traits into biocontrol agents or the host plants can result in biological augmentation, where the natural abilities of these agents are enhanced for better pest control. Biotechnological advancements assist in the development of biocontrol agents that are less prone to resistance development in target pests. This helps in addressing challenges related to the evolution of resistance, ensuring the long-term efficacy of biocontrol strategies. Genetic engineering can contribute to the development of strains of biocontrol agents that are more amenable to mass production. This ensures a consistent and cost-effective supply of biocontrol products to meet the demands of agricultural practices. This factor will accelerate the demand of the Global Biocontrol Market

## Key Market Challenges

### Public Perception and Acceptance

Many consumers and even some farmers may have limited knowledge about biocontrol methods. The lack of awareness about the effectiveness, safety, and benefits of biocontrol agents can contribute to skepticism and reluctance to adopt these practices. Traditional farming practices often involve the use of chemical pesticides that have been in use for decades. Shifting from conventional practices to biocontrol methods may face resistance due to the ingrained mindset and practices in the agricultural community. Some individuals may question the effectiveness of biocontrol methods compared to chemical pesticides. This perception can be a barrier, especially if there is a belief that biocontrol agents are not as potent in controlling pests or diseases. Farmers may resist adopting biocontrol practices due to the comfort and familiarity associated with conventional chemical pesticides. The transition to biocontrol may require changes in farming practices and mindset, which can be met with resistance. There may be concerns about the consistency and reliability of biocontrol methods, particularly when dealing with variable environmental conditions. Farmers may worry about the predictability of results compared to traditional chemical approaches. Farmers may fear potential economic losses during the transition period to biocontrol methods. The upfront costs or perceived risks associated with adopting new practices can be a barrier, especially for those with limited resources.



## Limited Availability of Biocontrol Agents

The development and commercialization of new biocontrol agents often require extensive research and development efforts. Limited funding and resources for R&D can constrain the discovery and optimization of novel biocontrol agents. The regulatory approval process for biocontrol agents can be complex and time-consuming. Meeting the stringent requirements for safety and efficacy may pose challenges for companies seeking to bring new biocontrol products to market. The development of biocontrol agents, especially those involving genetic modifications or new formulations, can have long development timelines. This extended timeline can limit the rate at which new products become available in the market. The biological nature of many biocontrol agents introduces inherent challenges. Factors such as limited shelf life, sensitivity to environmental conditions, and specific requirements for storage and transportation can affect the availability of these agents. The capacity for large-scale commercial production of biocontrol agents may be limited. Establishing and maintaining production facilities for living organisms can be resource-intensive, limiting the quantity of biocontrol agents available for distribution. Some biocontrol agents are species-specific, meaning they are effective against particular pests or diseases. Developing a broad range of biocontrol agents that target various pests and diseases adds complexity to the process and may result in limited options for certain agricultural challenges.

## Key Market Trends

### Expansion of Biocontrol Product Portfolios

Companies in the biocontrol sector are expanding their product portfolios to include a diverse range of biocontrol agents. This includes various beneficial insects, microbial-based products, and other naturally occurring organisms that help control pests and diseases in crops. The trend involves innovations in the formulation of biocontrol products. Companies are developing new formulations that enhance the stability, shelf life, and effectiveness of biocontrol agents. Improved formulations contribute to the ease of use and application of biocontrol solutions. Advancements in biotechnology play a significant role in expanding biocontrol portfolios. Companies are incorporating genetic engineering and biotechnological approaches to enhance the traits of biocontrol agents, making them more effective and adaptable to different agricultural scenarios. Continuous research and development efforts lead to the discovery of new strains and varieties of biocontrol agents. These new strains may exhibit improved pest control capabilities, resilience to environmental conditions, or other desirable

traits, expanding the options available to farmers. Companies are expanding their biocontrol product portfolios to cater to the pest management needs of different crops and agricultural systems globally. This involves introducing biocontrol solutions to new geographic regions and addressing specific regional pest challenges. The trend includes the development and introduction of biopesticides and biostimulants as part of biocontrol portfolios. Biopesticides target pests and diseases, while biostimulants enhance plant growth and resilience. This dual approach offers comprehensive solutions for sustainable crop management.

## Segmental Insights

### Product Type Insights

In 2023, the Global Biocontrol Market largest share was held by Macrobiotics segment and is predicted to continue expanding over the coming years. Macrobiotics, which include larger organisms such as predators and parasitoids, can be highly effective in controlling pests. They prey on or parasitize harmful insects, contributing to a targeted and natural method of pest management. Macrobiotics can target a wide range of pests, including insects, mites, and other arthropods. This versatility makes them suitable for addressing diverse pest issues in various crops, which may contribute to the segment's prominence in the biocontrol market. The use of macrobiotics aligns with the principles of integrated pest management (IPM), which involves the coordinated use of various pest control methods. Many farmers and agricultural practitioners increasingly favor IPM approaches for sustainable and holistic pest management. Macrobiotics generally have a lower environmental impact compared to chemical pesticides. The use of macrobiotics in pest control aligns with the growing global demand for environmentally friendly and sustainable agricultural practices.

### Mode of Treatment Insights

In 2023, the Global Biocontrol Market largest share was held by Soil Treatment segment and is predicted to continue expanding over the coming years. The Soil Treatment segment may involve the use of biocontrol agents in conjunction with other soil treatments for comprehensive pest management. Treating the soil can address various soil-borne pests and diseases, providing a holistic approach to agricultural pest control. Soil treatment with biocontrol agents can have long-lasting effects compared to foliar applications. Biocontrol organisms introduced into the soil may establish populations that persist over time, providing ongoing protection against soil-borne pests and diseases. Soil-borne pests and diseases can affect a wide range of

crops. The Soil Treatment segment may be considered essential for managing pests and diseases that have a significant impact on various agricultural commodities. Treating the soil with biocontrol agents can act as a preventive measure against potential pest and disease outbreaks. This proactive approach may be favoured by farmers seeking to minimize the risks associated with soil-borne issues.

## Regional Insights

The North America region dominates the Global Biocontrol Market in 2023. North America, particularly the United States and Canada, is known for its advanced and technologically sophisticated agricultural practices. Farmers in these regions are more likely to adopt innovative solutions, including biocontrol methods, to optimize crop yields and sustainability. The regulatory environment in North America, which may include measures to reduce the use of chemical pesticides and promote sustainable agriculture, could encourage the adoption of biocontrol solutions. Regulatory support for biocontrol products can drive market growth. Farmers in North America may have a higher level of awareness and education regarding the benefits of biocontrol methods. Education and outreach programs can play a crucial role in encouraging the adoption of new and sustainable agricultural practices. Robust research and development activities in the field of biocontrol in North America could contribute to the availability of a diverse range of effective biocontrol products. This, in turn, might attract farmers to integrate these products into their pest management strategies.

## Key Market Players

Bayer AG

Corteva Agriscience

Syngenta Ag

Aragene Inc

SeedForward GmbH

Powerpollen

Koppert



Locus AG Solutions

Marrone BioInnovations Inc.

Novozymes A/S

### Report Scope:

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

#### Biocontrol Market, By Product Type:

Microbials

Macrobials

Biochemicals

#### Biocontrol Market, By Function:

Bioinsecticides

Biofungicides

Bionematicides

Bioherbicide

Others

#### Biocontrol Market, By Mode of Treatment:

Soil Treatment

Seed Treatment

Foliar Spray

Post-harvest

Others

Biocontrol Market, By Crop Type:

Grains and Cereals

Oilseeds and Pulses

Fruits and Vegetable

Others

Biocontrol Market, By region:

North America

United States

Canada

Mexico

Asia-Pacific

China

India

South Korea

Australia

Japan

Europe

Germany

France

United Kingdom

Spain

Italy

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Biocontrol Market.

## Available Customizations:

Global Biocontrol 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).

## Contents

### 1. PRODUCT OVERVIEW

- 1.1. Market Definition
- 1.2. Scope of the Market
  - 1.2.1. Markets Covered
  - 1.2.2. Years Considered for Study
  - 1.2.3. Key Market Segmentations

### 2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validation
- 2.7. Assumptions and Limitations

### 3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

### 4. VOICE OF CUSTOMER

### 5. GLOBAL BIOCONTROL MARKET OUTLOOK

- 5.1. Market Size & Forecast
  - 5.1.1. By Value
- 5.2. Market Share & Forecast
  - 5.2.1. By Product Type (Microbials, Macrobiotics, Biochemicals)
  - 5.2.2. By Function (Bioinsecticides, Biofungicides, Bioherbicides, Bioherbicides Others)

5.2.3. By Mode of Treatment (Soil Treatment, Seed Treatment, Foliar Spray, Post-harvest Others)

5.2.4. By Crop Type (Grains and Cereals, Oilseeds and Pulses, Fruits, and Vegetables Others)

5.2.5. By Region

5.2.6. By Company (2023)

5.3. Market Map

## **6. ASIA PACIFIC BIOCONTROL MARKET OUTLOOK**

6.1. Market Size & Forecast

6.1.1. By Value

6.2. Market Share & Forecast

6.2.1. By Product Type

6.2.2. By Function

6.2.3. By Mode of Treatment

6.2.4. By Crop Type

6.2.5. By Country

6.3. Asia Pacific: Country Analysis

6.3.1. China Biocontrol Market Outlook

6.3.1.1. Market Size & Forecast

6.3.1.1.1. By Value

6.3.1.2. Market Share & Forecast

6.3.1.2.1. By Product Type

6.3.1.2.2. By Function

6.3.1.2.3. By Mode of Treatment

6.3.1.2.4. By Crop Type

6.3.2. India Biocontrol Market Outlook

6.3.2.1. Market Size & Forecast

6.3.2.1.1. By Value

6.3.2.2. Market Share & Forecast

6.3.2.2.1. By Product Type

6.3.2.2.2. By Function

6.3.2.2.3. By Mode of Treatment

6.3.2.2.4. By Crop Type

6.3.3. Australia Biocontrol Market Outlook

6.3.3.1. Market Size & Forecast

6.3.3.1.1. By Value

6.3.3.2. Market Share & Forecast



- 6.3.3.2.1. By Product Type
- 6.3.3.2.2. By Function
- 6.3.3.2.3. By Mode of Treatment
- 6.3.3.2.4. By Crop Type
- 6.3.4. Japan Biocontrol Market Outlook
  - 6.3.4.1. Market Size & Forecast
    - 6.3.4.1.1. By Value
  - 6.3.4.2. Market Share & Forecast
    - 6.3.4.2.1. By Product Type
    - 6.3.4.2.2. By Function
    - 6.3.4.2.3. By Mode of Treatment
    - 6.3.4.2.4. By Crop Type
- 6.3.5. South Korea Biocontrol Market Outlook
  - 6.3.5.1. Market Size & Forecast
    - 6.3.5.1.1. By Value
  - 6.3.5.2. Market Share & Forecast
    - 6.3.5.2.1. By Product Type
    - 6.3.5.2.2. By Function
    - 6.3.5.2.3. By Mode of Treatment
    - 6.3.5.2.4. By Crop Type

## **7. EUROPE BIOCONTROL MARKET OUTLOOK**

- 7.1. Market Size & Forecast
  - 7.1.1. By Value
- 7.2. Market Share & Forecast
  - 7.2.1. By Product Type
  - 7.2.2. By Function
  - 7.2.3. By Mode of Treatment
  - 7.2.4. By Crop Type
  - 7.2.5. By Country
- 7.3. Europe: Country Analysis
  - 7.3.1. France Biocontrol Market Outlook
    - 7.3.1.1. Market Size & Forecast
      - 7.3.1.1.1. By Value
    - 7.3.1.2. Market Share & Forecast
      - 7.3.1.2.1. By Product Type
      - 7.3.1.2.2. By Function
      - 7.3.1.2.3. By Mode of Treatment

- 7.3.1.2.4. By Crop Type
- 7.3.2. Germany Biocontrol Market Outlook
  - 7.3.2.1. Market Size & Forecast
    - 7.3.2.1.1. By Value
  - 7.3.2.2. Market Share & Forecast
    - 7.3.2.2.1. By Product Type
    - 7.3.2.2.2. By Function
    - 7.3.2.2.3. By Mode of Treatment
    - 7.3.2.2.4. By Crop Type
- 7.3.3. Spain Biocontrol Market Outlook
  - 7.3.3.1. Market Size & Forecast
    - 7.3.3.1.1. By Value
  - 7.3.3.2. Market Share & Forecast
    - 7.3.3.2.1. By Product Type
    - 7.3.3.2.2. By Function
    - 7.3.3.2.3. By Mode of Treatment
    - 7.3.3.2.4. By Crop Type
- 7.3.4. Italy Biocontrol Market Outlook
  - 7.3.4.1. Market Size & Forecast
    - 7.3.4.1.1. By Value
  - 7.3.4.2. Market Share & Forecast
    - 7.3.4.2.1. By Product Type
    - 7.3.4.2.2. By Function
    - 7.3.4.2.3. By Mode of Treatment
    - 7.3.4.2.4. By Crop Type
- 7.3.5. United Kingdom Biocontrol Market Outlook
  - 7.3.5.1. Market Size & Forecast
    - 7.3.5.1.1. By Value
  - 7.3.5.2. Market Share & Forecast
    - 7.3.5.2.1. By Product Type
    - 7.3.5.2.2. By Function
    - 7.3.5.2.3. By Mode of Treatment
    - 7.3.5.2.4. By Crop Type

## **8. NORTH AMERICA BIOCONTROL MARKET OUTLOOK**

- 8.1. Market Size & Forecast
  - 8.1.1. By Value
- 8.2. Market Share & Forecast

- 8.2.1. By Product Type
- 8.2.2. By Function
- 8.2.3. By Mode of Treatment
- 8.2.4. By Crop Type
- 8.2.5. By Country
- 8.3. North America: Country Analysis
  - 8.3.1. United States Biocontrol Market Outlook
    - 8.3.1.1. Market Size & Forecast
      - 8.3.1.1.1. By Value
    - 8.3.1.2. Market Share & Forecast
      - 8.3.1.2.1. By Product Type
      - 8.3.1.2.2. By Function
      - 8.3.1.2.3. By Mode of Treatment
      - 8.3.1.2.4. By Crop Type
  - 8.3.2. Mexico Biocontrol Market Outlook
    - 8.3.2.1. Market Size & Forecast
      - 8.3.2.1.1. By Value
    - 8.3.2.2. Market Share & Forecast
      - 8.3.2.2.1. By Product Type
      - 8.3.2.2.2. By Function
      - 8.3.2.2.3. By Mode of Treatment
      - 8.3.2.2.4. By Crop Type
  - 8.3.3. Canada Biocontrol Market Outlook
    - 8.3.3.1. Market Size & Forecast
      - 8.3.3.1.1. By Value
    - 8.3.3.2. Market Share & Forecast
      - 8.3.3.2.1. By Product Type
      - 8.3.3.2.2. By Function
      - 8.3.3.2.3. By Mode of Treatment
      - 8.3.3.2.4. By Crop Type

## **9. SOUTH AMERICA BIOCONTROL MARKET OUTLOOK**

- 9.1. Market Size & Forecast
  - 9.1.1. By Value
- 9.2. Market Share & Forecast
  - 9.2.1. By Product Type
  - 9.2.2. By Function
  - 9.2.3. By Mode of Treatment

- 9.2.4. By Crop Type
- 9.2.5. By Country
- 9.3. South America: Country Analysis
  - 9.3.1. Brazil Biocontrol Market Outlook
    - 9.3.1.1. Market Size & Forecast
      - 9.3.1.1.1. By Value
    - 9.3.1.2. Market Share & Forecast
      - 9.3.1.2.1. By Product Type
      - 9.3.1.2.2. By Function
      - 9.3.1.2.3. By Mode of Treatment
      - 9.3.1.2.4. By Crop Type
  - 9.3.2. Argentina Biocontrol Market Outlook
    - 9.3.2.1. Market Size & Forecast
      - 9.3.2.1.1. By Value
    - 9.3.2.2. Market Share & Forecast
      - 9.3.2.2.1. By Product Type
      - 9.3.2.2.2. By Function
      - 9.3.2.2.3. By Mode of Treatment
      - 9.3.2.2.4. By Crop Type
  - 9.3.3. Colombia Biocontrol Market Outlook
    - 9.3.3.1. Market Size & Forecast
      - 9.3.3.1.1. By Value
    - 9.3.3.2. Market Share & Forecast
      - 9.3.3.2.1. By Product Type
      - 9.3.3.2.2. By Function
      - 9.3.3.2.3. By Mode of Treatment
      - 9.3.3.2.4. By Crop Type

## **10. MIDDLE EAST AND AFRICA BIOCONTROL MARKET OUTLOOK**

- 10.1. Market Size & Forecast
  - 10.1.1. By Value
- 10.2. Market Share & Forecast
  - 10.2.1. By Product Type
  - 10.2.2. By Function
  - 10.2.3. By Mode of Treatment
  - 10.2.4. By Crop Type
  - 10.2.5. By Country
- 10.3. MEA: Country Analysis

### 10.3.1. South Africa Biocontrol Market Outlook

#### 10.3.1.1. Market Size & Forecast

##### 10.3.1.1.1. By Value

#### 10.3.1.2. Market Share & Forecast

##### 10.3.1.2.1. By Product Type

##### 10.3.1.2.2. By Function

##### 10.3.1.2.3. By Mode of Treatment

##### 10.3.1.2.4. By Crop Type

### 10.3.2. Saudi Arabia Biocontrol Market Outlook

#### 10.3.2.1. Market Size & Forecast

##### 10.3.2.1.1. By Value

#### 10.3.2.2. Market Share & Forecast

##### 10.3.2.2.1. By Product Type

##### 10.3.2.2.2. By Function

##### 10.3.2.2.3. By Mode of Treatment

##### 10.3.2.2.4. By Crop Type

### 10.3.3. UAE Biocontrol Market Outlook

#### 10.3.3.1. Market Size & Forecast

##### 10.3.3.1.1. By Value

#### 10.3.3.2. Market Share & Forecast

##### 10.3.3.2.1. By Product Type

##### 10.3.3.2.2. By Function

##### 10.3.3.2.3. By Mode of Treatment

##### 10.3.3.2.4. By Crop Type

## 11. MARKET DYNAMICS

### 11.1. Drivers

### 11.2. Challenges

## 12. MARKET TRENDS & DEVELOPMENTS

### 12.1. Recent Developments

### 12.2. Product Launches

### 12.3. Mergers & Acquisitions

## 13. PORTER'S FIVE FORCES ANALYSIS

### 13.1. Competition in the Industry

- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Product

## **14. COMPETITIVE LANDSCAPE**

- 14.1. Bayer AG
  - 14.1.1. Business Overview
  - 14.1.2. Product & Service Offerings
  - 14.1.3. Recent Developments
  - 14.1.4. Financials (If Listed)
  - 14.1.5. Key Personnel
  - 14.1.6. SWOT Analysis
- 14.2. Corteva Agriscience
- 14.3. Syngenta Ag
- 14.4. Agragene Inc
- 14.5. SeedForward GmbH
- 14.6. Powerpollen
- 14.7. Koppert
- 14.8. Locus AG Solutions
- 14.9. Marrone BioInnovations Inc.
- 14.10. Novozymes A/S

## **15. STRATEGIC RECOMMENDATIONS**

## **16. ABOUT US & DISCLAIMER**



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