

# Frass Fertilizer Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Soldier Flies, Mealworms, Crickets, Buffalo Worms, and Others), By Form (Solid, Liquid Extracts), By Application (Cereals & Grains, Fruits, Vegetables and Others), By Region and Competition, 2019-2029F

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## Abstracts

Global Frass Fertilizer Market was valued at USD 96.11 Million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.94% through 2029. The frass fertilizer market is influenced by several drivers that contribute to its growth and development such as the rise of the organic food business, increasing awareness about the use of insects to convert waste into organic fertilizer, and increased waste output from the restaurant, farm, and food beverage industries.

There is a rising global preference for organic and sustainable agricultural methods. Frass fertilizers are recognized as an environmentally friendly and natural substitute for conventional chemical fertilizers. With consumers and farmers increasingly mindful of environmental issues and seeking sustainable farming techniques, the demand for insect-based fertilizers is projected to grow. Insects such as black soldier flies, mealworms, and crickets are abundant in essential nutrients like nitrogen, phosphorus, and potassium, crucial for plant development. Insect-based fertilizers provide a natural source of these nutrients while also enhancing soil health. As awareness of the nutritional advantages of insect-based products expands, so does the demand for frass fertilizers.

Governments worldwide are implementing policies and regulations to encourage sustainable agricultural practices. This includes promoting the use of organic fertilizers

and reducing reliance on chemical alternatives. Government support through funding, subsidies, and awareness initiatives plays a significant role in driving the adoption of frass fertilizers.

## Key Market Drivers

### Increasing Adoption of Insect-Based Fertilizers in Farming

Globally, there is significant interest in employing insect larvae to recycle organic waste into high-quality frass fertilizer using a circular economy strategy. All bug species' frass fertilizers have an acceptable number of macronutrients [nitrogen (N), phosphorus (P), potassium (K), secondary nutrients (calcium, magnesium, and sulphur), and micronutrients (manganese, copper, iron, zinc, boron, and sodium).

Insects' employment as bio-converters of low-value organic materials into economical and high-quality food, feed, fibre, and organic fertilizer products has gained widespread interest.

For instance, the French Agency for Food, Environmental, and Occupational Health and Safety, ANSES, granted insect, the permission for its natural frass fertilizer, Frass in 2020. The mealworm *Tenebrio Molitor*, which feeds on cereal by-products at the insect plant in Dole (France), produces insect waste or frass, which is used to make fertilizer. The product, known as 'Frass,' was developed over the course of four years by insect and several esteemed universities. It is currently compliant with regulation No. 384/2007 and can be used in organic farming. One of the most well-known European wine brands, Torres, and Compo Group, a leader in plant nutrition for amateur gardeners, are among Frass's initial clients.

### Declining Food Production due to Soil Degradation

Most places across the world have high levels of hunger and food insecurity, and the situation is worsening owing to increased soil degradation. In Sub-Saharan Africa (SSA), for example, there are significant problems to environmental health and food and nutrition security. Approximately 40% of soils in SSA are lacking in the majority of nutrients essential for agricultural growth, with 25% impacted by aluminum toxicity, 18% susceptible to leaching, and 8.5% characterized by phosphorus fixation. Despite the difficulties, most smallholder farmers use little (10 kg ha<sup>-1</sup> year<sup>-1</sup>) or no mineral fertilizer due to the high costs and restricted access. Even when mineral fertilizers are extensively utilized, their effectiveness is hampered by poor soil organic matter,

micronutrient shortages, and excessive soil acidity. Although farmers find organic fertilizer to be acceptable and economical, there has been minimal uptake in SSA due to low quality, extended production times, and a lack of organic materials on the farm. As a result, there is a need to investigate alternate sources of organic fertilizers that are widely available, inexpensive, and of high quality, such as frass fertilizer which qualifies the criteria of a nutrient-rich ideal fertilizer.

Insect mass rearing utilizing organic waste might help SSA overcome the issues of inadequate waste management and low soil fertility. Organic waste bioconversion by insects into organic fertilizers might prevent land filling and return nutrients to agricultural regions. The bioconversion of organic waste into high-value commercial goods is a positive step towards long-term waste recycling, with the revenue and other non-monetary advantages serving as incentives for better waste management and a circular economy. For example, *H. illucens* larvae have been shown to recycle organic wastes into nutrient-rich mature and stable frass fertilizer in about 5 weeks, compared to 8-24 weeks for standard composting. Ex-ante macroeconomic calculations in Kenya show that using insect bioconversion technology may recycle between 2 and 18 million tonnes of garbage into organic fertilizer worth 9-85 million USD each year.

### Rising Cost of Organic Fertilizers

Frass fertilizer is often derived from the excrement of insects that are raised on organic waste materials or agricultural byproducts. By utilizing these waste materials as feedstock, frass fertilizer production can help reduce waste disposal costs for industries or farmers. This can contribute to overall cost savings and make frass fertilizer a cost-effective option among the use of other types of organic fertilizers.

By selling organic fertilizer as a byproduct of BSF rearing, the frass fertilizer produced have both improve income from insect farming and spare the farmer from he expense of purchasing costly fertilizer.

Frass fertilizer can be a cost-effective alternative to traditional fertilizers because it provides a concentrated source of nutrients. As a result, farmers require smaller quantities of frass fertilizer compared to conventional fertilizers to achieve the same nutrient levels in the soil. This can lead to cost savings in terms of lower input costs. Since producers and dealers are likely to prefer shipping restricted goods to larger customers, relatively smaller markets—especially many African countries—face a challenge for the availability of fertilizers. Given that Africa still only uses a small number of fertilizers—an estimated average of 25 kilogrammes per hectare, which is less than

the 121 kg/ha used globally—a drop in fertilizer use would result in a major decline in productivity for the continent, which might have serious implications for food security. Thus, the need for fertilizer production and to lower the dependency on export is important for low-income country, the use of frass fertilizer is expected to increase as the large-scale insect farms benefit from economies of scale, which can help reduce production costs per unit of frass fertilizer. Smaller-scale operations may face higher production costs due to limitations in economies of scale. However, advancements in insect farming techniques and automation can help increase efficiency and lower costs even for smaller operations.

### Hunger and Food Insecurity Among Low-Income Countries

The production of human food and/or fuel is increasingly competing with the production of animal feed for resources (land, water, and fertilizers). This increases the pressure on the environment (such as on water supplies, deforestation, or soil degradation in developing nations). The Food and Agriculture Organization (FAO) estimates that the world's food output will need to expand by 70% by 2050, mostly to feed a population that is predicted to exceed 9.1 billion people.

Organic fertilizer made from insect frass is one potential soil enhancement that is gaining popularity. An increasing concern is the industrial-scale breeding of insects for human consumption and animal feed, which generates a sizable amount of organic waste as a byproduct.

With more than 50 million tonnes of meat produced annually, Europe is the third largest producer of poultry in the world, according to the Association of Poultry Processors and Poultry Trade in the EU Countries.

The International Platform of Insects for Food and Feed (IPIFF), the umbrella association of the European insect sector based in Brussels, has published Commission Regulation (EU) 2021/1372 in the Official Journal of the European Union. This regulation permits the use of processed animal proteins derived from insects (insect PAPs) in poultry and pig feed. Additionally, Regulation (EU) 2021/1925, adopted on November 29, 2021, outlines the EU's minimum requirements for the production and marketing of insect frass as an organic fertilizer. The harmonization of processing requirements across Member States is primarily achieved through the development of EU standards for insect frass. Operators across the EU seeking authorization from their national competent authorities to utilize insect frass as organic fertilizer must now adhere to the time/temperature norms and other standards specified in Regulation (EU)

2021/1925. Consequently, European countries are anticipated to become extensive users of frass fertilizer compared to other nations.

For instance, a biofertilizer derived 100% from *Tenebrio molitor* called oFrass is extensively used in organic farming. Depending on the demands of the farmer, frass is sold as powder or as pellets, two forms that make application easier.

European Commission itself supports its usage in food production by its inclusion on the Union's list of new foods. Thus, increasing investment in organic farming and practice of using frass fertilizer can contribute to sustainable agriculture practices, environmental conservation, and improved food production.

### Key Market Challenges

#### Price Competitiveness Cost-Efficiency

A significant challenge hindering the growth of the global Frass fertilizer market is the need to maintain price competitiveness and ensure cost-efficiency relative to conventional chemical fertilizers. While Frass fertilizer offers numerous benefits such as improved soil health, enhanced nutrient uptake, and reduced environmental impact, its production costs may be higher compared to synthetic fertilizers due to factors such as insect rearing, processing, and packaging expenses. As a result, farmers and agricultural stakeholders may be hesitant to adopt Frass fertilizer if it is perceived as too expensive or cost-prohibitive relative to conventional alternatives.

#### Market Fragmentation and Competition

Market fragmentation and intense competition pose significant challenges to the growth of the global Frass fertilizer market, creating obstacles for market penetration and expansion efforts. The agricultural inputs industry is highly diverse and dynamic, characterized by a multitude of players offering a wide range of products and solutions to meet the needs of farmers and growers worldwide. Established players in the industry, including multinational corporations and well-established brands, have established strong footholds and brand recognition within the market, making it difficult for newer entrants such as Frass fertilizer to gain traction and capture market share.

Moreover, the agricultural inputs market is inundated with a plethora of alternative products and solutions that compete directly with Frass fertilizer for market share. Organic fertilizers, bio-stimulants, and soil amendments represent formidable

competitors, each offering unique advantages and value propositions that appeal to different segments of the agricultural community. Organic fertilizers, for example, are prized for their natural and sustainable qualities, while bio-stimulants are valued for their ability to enhance plant growth and productivity through biological mechanisms. Soil amendments, on the other hand, focus on improving soil health and fertility through the addition of organic matter and beneficial microorganisms.

Furthermore, the presence of a diverse array of players in the agricultural inputs market, ranging from multinational corporations to small-scale producers and distributors, further exacerbates market fragmentation and intensifies pricing pressures. Larger companies with extensive resources and distribution networks may enjoy economies of scale and pricing advantages, allowing them to undercut smaller competitors and dominate market segments. Conversely, smaller producers and distributors may struggle to compete on price and scale, limiting their ability to penetrate markets and reach target customers effectively.

## Key Market Trends

### Increasing Demand for Sustainable Agriculture Practices

One of the primary trends driving the expansion of the global Frass fertilizer market is the increasing demand for sustainable agriculture practices. As concerns about environmental degradation, soil health, and food safety continue to mount, farmers and growers worldwide are seeking alternative solutions that promote ecological balance, minimize chemical inputs, and enhance long-term sustainability in agricultural production. Frass fertilizer, derived from insect excrement, offers a natural and sustainable alternative to conventional chemical fertilizers, providing essential nutrients and promoting soil fertility while minimizing environmental impact.

The growing emphasis on sustainability in agriculture is fueled by various factors, including consumer preferences for organic and eco-friendly products, regulatory initiatives promoting environmentally friendly farming practices, and the recognition of the role of agriculture in mitigating climate change and preserving biodiversity. Frass fertilizer aligns with these sustainability goals by offering a renewable and biodegradable source of plant nutrients that promotes soil health, enhances crop resilience, and reduces reliance on synthetic chemicals.

### Technological Advancements in Frass Fertilizer Production and Application

A significant trend propelling the growth of the global Frass fertilizer market is the ongoing technological advancements in Frass fertilizer production and application methods. As the demand for sustainable agriculture practices continues to rise, there is increasing emphasis on innovation and technology-driven solutions to enhance the efficiency, efficacy, and scalability of Frass fertilizer production and utilization.

Technological advancements in Frass fertilizer production encompass various aspects, including insect farming techniques, processing methods, and quality control measures. Advanced insect rearing technologies, such as automated feeding systems, climate-controlled environments, and optimized breeding protocols, can significantly increase insect biomass production and improve the overall efficiency of Frass fertilizer production. Similarly, innovations in processing and formulation technologies can enhance the nutrient content, consistency, and shelf life of Frass fertilizer products, ensuring optimal performance and quality for end-users.

## Segmental Insights

### Type Insights

Based on the type, soldier flies stand out as the dominant type in the global market. Soldier Flies have gained prominence due to their efficient conversion of organic waste into nutrient-rich Frass, making them highly suitable for large-scale commercial production of Frass fertilizer.

Soldier Flies are prized for their voracious appetite and rapid growth rates, allowing them to consume significant quantities of organic matter and produce Frass efficiently. Their ability to thrive on a wide range of organic substrates, including food waste, agricultural residues, and livestock manure, makes them versatile and adaptable to diverse production environments. Additionally, Soldier Flies are relatively low maintenance compared to other insect species, requiring minimal care and attention during the rearing process.

Furthermore, soldier fly frass exhibits excellent nutrient composition and microbial diversity, making it a valuable soil amendment and plant growth promoter. Rich in essential nutrients such as nitrogen, phosphorus, and potassium, Soldier Fly Frass provides plants with the necessary elements for healthy growth and development. Moreover, the presence of beneficial microorganisms in Soldier Fly Frass enhances soil fertility and promotes soil health, improving nutrient cycling and microbial activity in the soil ecosystem.

## Form Insights

Based on the form segment, solid extracts are dominating the global Frass fertilizer market. Solid Frass fertilizer extracts are favoured for their ease of handling, storage, and application, making them a practical choice for farmers and growers worldwide. Solid Frass extracts are typically available in granular or pelletized forms, making them convenient to transport, store, and distribute.

Solid Frass extracts offer excellent nutrient content and microbial diversity, providing plants with a balanced blend of essential nutrients and beneficial microorganisms that promote soil health and plant growth. The solid form of Frass fertilizer allows for slow-release nutrient availability, ensuring sustained nutrient uptake by plants over time, thereby reducing the need for frequent reapplication and enhancing efficiency in nutrient utilization.

Solid Frass extracts are compatible with various application methods, including broadcasting, top-dressing, and incorporation into the soil, making them versatile and adaptable to different farming systems and crop types. Farmers and growers can easily integrate solid Frass extracts into their existing fertilizer management practices, enhancing soil fertility, improving crop yields, and promoting sustainable agriculture.

## Regional Insights

North America is currently dominating the global Frass fertilizer market. This dominance can be attributed to several factors that contribute to the region's significant market share and influence in the Frass fertilizer industry.

North America has a well-established agricultural sector with a high level of awareness and adoption of sustainable agriculture practices. Farmers and growers in North America are increasingly turning to organic and eco-friendly alternatives to conventional fertilizers, driving demand for products like Frass fertilizer that offer natural and sustainable solutions for soil health and crop nutrition.

North America is home to a thriving insect farming industry, particularly in countries such as the United States and Canada, where innovative companies are pioneering the production of Frass fertilizer on a commercial scale. The availability of advanced technologies, research institutions, and supportive regulatory frameworks in North America has facilitated the development and commercialization of Frass fertilizer



products, enabling the region to maintain its leadership position in the global market.

### Key Market Players

Insect SAS

Protix B.V.

Enterra Feed Corporation

InnovaFeed SAS

EnviroFlight, LLC

Nutrition Technologies Group

Entomo Farms

nextProtein

Hexafly

Protenga Pte. Ltd.

### Report Scope:

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

### Frass Fertilizer Market,By Type:

oSoldier Flies

oMealworms

oCrickets

oBuffalo Worms

oOthers

Frass Fertilizer Market,By Form:

oSolid

oLiquid Extracts

Frass Fertilizer Market,By Application:

oCereals Grains

oFruits

oVegetables

oOthers

Frass Fertilizer Market, By Region:

oNorth America

United States

Canada

Mexico

oEurope

France

United Kingdom

Italy

Germany

Spain

oAsia-Pacific

China

India

Japan

Australia

South Korea

oSouth America

Brazil

Argentina

Colombia

oMiddle East Africa

South Africa

Saudi Arabia

UAE

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Frass Fertilizer Market.

### Available Customizations:

Global Frass Fertilizer market report with the given market data, Tech Sci 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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