

Introduction to the 2023 DunhamTrimmer Global Biocontrol Report

The **2023 DunhamTrimmer Global Biocontrol Market Report** quantifies the Biocontrol market and its numerous subsegments for products used in **Agriculture, Forestry, and Industrial Uses**. It provides insights into all four **Product Type** subcategories of Biocontrol: **Microbials, Biochemicals, Macrobiotics, and Others**. It also segments the market by **Use Segments: Bioinsecticides, Biofungicides, Bionematicides, Bioherbicides, and Plant Growth Regulators**.

The Biocontrol Market has nearly doubled in size since DunhamTrimmer issued its first Global Biocontrol Report in 2019. While our 2019 report found the global Biocontrol market growing at 15-17% **CAGR**, we now see this market growing at reduced rate from 2023-2029. As the early adopting regions, growth rates in the US and Western EU are slowing at a faster rate than other markets. Yet despite this deceleration, there remain several countries and regions that continue to experience rapid expansion, particularly Latin America.

By 2029, DunhamTrimmer projects the global Biocontrol market will exceed \$15 billion. This is an amazing achievement for an industry that didn't reach \$1 billion in global sales until 2010.

Microbial and biochemical products continue to dominate the Biocontrol market, representing over 90% of global revenue. Bioinsecticides and biofungicides are the leading use segments for Biocontrol products, representing more than 70% of global revenue. The fastest-growing use segment is bionematicides, driven largely by adoption of these products in row crops in LATAM. Macroorganisms continue to be found primarily in protected markets, but we are seeing an increasing trend for their introduction in some outdoor crops.

The 2023 DunhamTrimmer Global Biocontrol Market Report includes a one-of-kind, in-depth section **Defining Biocontrol** technologies. It also features a detailed look at the **Trends and Drivers** that are helping to shape the industry. Since **Regulatory** systems remain a key influencing factor on the pace of Biocontrol market development, the Report includes an insightful section on regulatory agencies and processes in key markets. The US market has benefited from EPA establishing a dedicated Biopesticide Division nearly 30 years ago, and recent regulatory reforms in Brazil have helped fuel the rapid market expansion now occurring there. Much of the slowdown in the EU remains a challenging regulatory environment, particularly for microbial-based Biocontrol products.

From a numbers perspective, data and forecasts are provided for: 5 **Global Regions**, 21 **Key Countries**, and 9 **Crop Groups**. Market regional and country outlooks are further segmented by 4 Product Types, 5 Use Segments, and 5 Application types.

Finally, DunhamTrimmer scores and profiles 120 of the **Leading Companies** in the Global Biocontrol space using its proprietary Consolidated Strength Rating (CSR) system. This scoring includes assessment of product portfolio, global footprint, innovation and disruption capacity, and top-line revenue estimates.

The Report concludes with STEP (a.k.a. PEST, PESTLE) Analysis, a Porter's 5 Forces Analysis, and **SWOT** analysis.

A complete outline of the 2023 DunhamTrimmer Global Biocontrol Report can be found below:

Executive Summary

Report Methodology

Base Assumptions

Market Projections

Research Methodology Global Regional Segmentation

- Key Countries by Region
- Product Type Segmentation
- Crop Group Segmentation

Defining Biocontrol

Introduction

How We Define Biocontrols

Biocontrol Classifications: Modes of Action, Leading Actives, Manufacturing, Strengths and Weaknesses

Microbials

Bacteria

Fungi

Baculoviruses

Protozoa

Biochemicals

Macrobials

Pheromones

Plant Growth Regulators

Minerals

Bioinsecticides

Biofungicides

Bionematicides

Bioherbicides

Trends and Drivers

Macro Trends

Key Drivers

Influencing Factors

Regulatory Overview

US

Europe

LATAM

Asia

ROW

Market Overview: Regions

Global Market Values 2021

US/Canada Biocontrol Market

US, Canada

Europe Biocontrol Market

Spain, Italy, France, Netherlands, Germany, Rest of Europe

LATAM Biocontrol Market

Brazil, Mexico, Argentina, Chile, Rest of LATAM

Asia/Pacific Biocontrol Market

China, India, Japan, Australia/New Zealand, Rest of Asia/Pacific

Rest of World Biocontrol Market

South Africa, Rest of ROW

Charts & Graphs for each Region

- Regional Market Values 2021
- Regional CAGR 2017-2029
- Regional Shares 2021-2029
- Regional Market Values 2017-2029
- Regional Market Shares 2017-2029

Product Types

Product Types Global Market Values 2021

Microbial Biocontrol Market

Biochemical Biocontrol Market

Macroorganism Biocontrol Market

Other Biocontrols

Charts & Graphs for each Product Type

- Product Types Regional Market Values 2021
- Product Types Regional CAGR 2017-2029
- Product Types Regional Shares 2021-2029
- Product Types Regional Values 2017-2029
- Product Types Regional Shares 2017-2029

Use Segments

Use Segments Global Market Values 2021

Bioinsecticide Biocontrol Market

Biofungicide Biocontrol Market

Bioherbicide Biocontrol Market

Bionematicide Biocontrol Market

PGR Biocontrol Market

Other Uses Biocontrol Market

Charts & Graphs for each Use Segment

- Use Segments Regional Market Values 2021
- Use Segments Regional CAGR 2017-2029
- Use Segments Regional Shares 2021-2029
- Use Segments Regional Values 2017-2029
- Use Segments Regional Shares 2017-2029

Application Types

Application Types Global Market Values 2021

Foliar Application Biocontrol Market

Soil Application Biocontrol Market

Seed Treatment Biocontrol Market

Bionematicide Biocontrol Market

Postharvest Biocontrol Market

Other Application Types Biocontrol Market

Charts & Graphs for each Application Type

- Application Types Regional Market Values 2021
- Application Types Regional CAGR 2017-2029
- Application Types Regional Shares 2021-2029
- Application Types Regional Values 2017-2029
- Application Types Regional Shares 2017-2029

Crop Groups

Global Crop Group Market Values 2021
 Tree Fruit & Nuts Biocontrol Market
 Vine Crops Biocontrol Market
 Berries Biocontrol Market
 Vegetables & Annual Fruit Biocontrol Market
 Row Crops & Cereals Biocontrol Market
 Greenhouse Veg & Cannabis Biocontrol Market
 Turf & Ornamentals Biocontrol Market
 Tropical Crops % Others Biocontrol Market
 Non-Crop Biocontrol Market

Charts & Graphs for each Crop Group

- Crop Groups Regional Market Values 2021
- Crop Groups Regional CAGR 2017-2029
- Crop Groups Regional Shares 2021-2029
- Crop Groups Regional Values 2017-2029
- Crop Groups Regional Shares 2017-2029

Key Countries Highlights

US	Argentina
Canada	Chile
Spain	Rest of LATAM
Italy	China
France	India
Netherlands	Japan
Germany	Australia/New Zealand
Rest of Europe	Rest of Asia/Pacific
Brazil	South Africa
Mexico	Rest of ROW

Charts & Graphs for each Country

- Country Use Segment Values 2017-2029
- Country Product Use Segments CAGR 2017-2029
- Country Product Use Shares 2021-2029
- Country Product Types Market Values 2017-2029
- Country Crop Groups Shares 2017-2029
- Country Crop Groups Market Values 2017-2029

Leading Companies

DunhamTrimmer CSR Scoring

Leading Company Groups

Leading Company Profiles

Spotlight Company Highlights

Company Comparison Table

- Product Type Strength
- Global Footprint Strength
- Innovation & Disruption Strength
- Topline Revenue Strength
- Company CSR

SWOT Analysis

Introduction

STEP Analysis

Porter's 5 Forces Analysis

- Bargaining Power of Customers
- Bargaining Power of Suppliers
- Threat of Substitute Products
- Threat of New Entrants
- Rivalry Among Existing Competitors

SWOT Analysis

Acknowledgements and Disclaimer