



The biological market grows in 2025

- Global biologicals market reached \$9.2 billion, up +5.9% YoY
- Growth continues to outpace many traditional ag inputs, driven by sustainability and innovation trends



What's driving growth?

- Strong demand for low-residue and organic production
- Regulatory pressure on conventional agrochemicals
- Rapid innovation (e.g., RNAi, peptides, microbials)
- Rising pest resistance to synthetics
- Increasing climate stress and need for resilience
- **Biologicals are becoming core to integrated pest management (IPM) strategies**



How the market breaks down

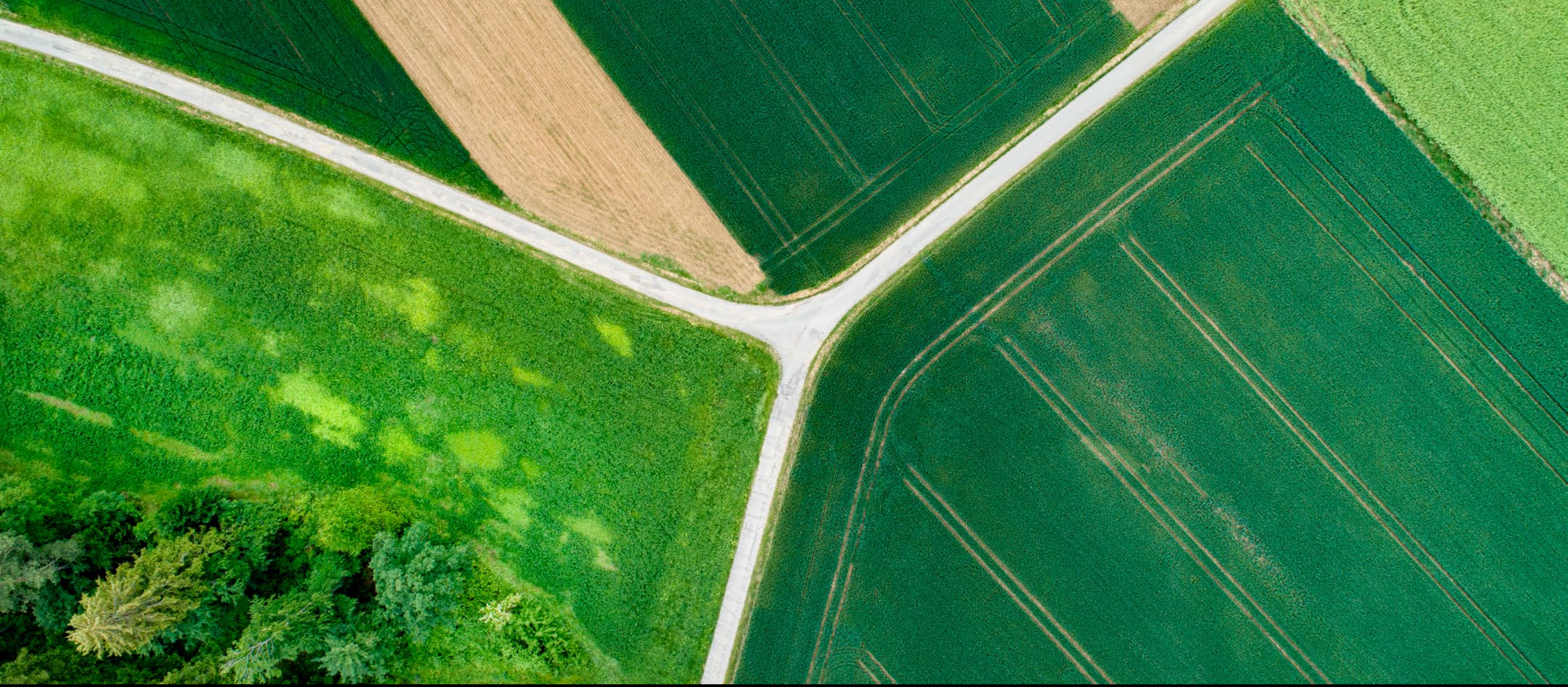
- Biocontrol agents (BCAs): \$4.3B (47%)
 - Biostimulants: \$3.5B (38%)
 - Biofertilizers: \$1.4B (16%)
- **BCAs remain dominant, but biostimulants are the fastest-growing segment**



Where biologicals are used

- Row crops: 39% (largest share & fastest growth)
- Fruit: 25%
- Vegetables: 23%
- Non-crop: 14%

→ High-value crops still lead adoption, but row crops are scaling rapidly



All regions are growing

- Europe: \$3.3B (+7.0%) → largest market
- Asia-Pacific: \$2.3B (+6.4%)
- North America: \$1.9B (+5.5%)
- Latin America: \$1.5B (+3.8%)
- MEA: \$0.3B (+4.0%)

→ Growth driven by sustainability demand and regulatory frameworks



What's holding the market back?

- Lower efficacy vs synthetics in some cases
 - Shorter shelf life & storage challenges
 - Higher cost per hectare
 - Need for technical expertise & stewardship
 - Variable field performance
- **Adoption still requires education and consistency**



Industry dynamics

Consolidation and competition rising

- 100+ acquisitions and partnerships (since 2020)
 - Strong activity from major ag players (Bayer, Corteva, FMC, Syngenta, UPL)
 - Emergence of biological pure-play leaders (Biofirst, Koppert, Rovensa)
- **Scale and innovation are accelerating market maturity**



What's next?

Outlook remains strong

– 2025–2030 CAGR:

- Biostimulants: ~9%
- Biofertilizers: ~8%
- BCAs: ~8%

→ Continued expansion driven by regulation, innovation, and sustainability

Connect with S&P Global's agriculture experts to access:

- Detailed biologicals market forecasts and outlook
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