



# The Business of Biologicals

Session 1: Showcasing Innovations



Laura Mahecha, Director Agrochemicals | October 20, 2025

# Agenda

- + About Kline
- + Sources, Scope and Methodology
- + Biological Market Size and Trends
- + Innovations and Grower Benefits
- + Leading Suppliers
- + Appendix and Contact

# About Kline



# We are Kline + Company

200+  
Employees

9 Global  
Offices

66 Years

30+  
Languages  
Spoken

In 1959, Dr. Charles Kline, a Princeton-trained chemist, was frustrated with the lack of market research and competitive data on the growing specialty chemical industry.

Six decades later, Kline + Company remains a trusted partner for uncovering unique insights and market intelligence through our in-depth primary research to formulate business strategies, recommendations, and ongoing guidance.

Our market researchers are global subject matter experts in agrochemicals, biocontrol, and specialty chemicals.



# Kline + Company is a global market intelligence and advisory firm

## MARKET RESEARCH

Identify market opportunities and create action plans with off-the-shelf products, including reports, databases, intelligence centers.

## CUSTOM RESEARCH

Leverage Kline + Company's content, while customizing the granularity, scope, and timing of the research for your specific business needs on the single-client basis.

## ADVISORY SERVICES

Solve critical business issues and implement solutions with the help of our seasoned industry experts.

## GLOBAL REACH



## SELECT CLIENTS



# Sources, Scope and Methodology



# Today's Presentation is Built from Kline's Portfolio of Studies on Biological Crop Protection

Kline regularly publishes global reports and databases as follows:

5-year forecasts in all studies

## Biopesticides Core Markets 2014, 2017, 2019, 2021, 2025 (14 countries)

**Global Biopesticides**  
An Overview of Natural Pesticides

The report provides a window into the growing biopesticides market. It includes technology descriptions, company profiles, and economic analysis of product segments, while providing an outlook and product category forecast for each country/market segment and company.

**Regional Coverage:** Americas, Europe, Africa

**Scope:**

- The biopesticides market status for each country
- Data segmented for each country by crop or application
- Information on key diseases and pests treated with biopesticides
- Size of biological insecticides, nematodes, fungicides, herbicides, and seed treatment products

**Technologies included:**

- Microbial species, such as beneficial fungi, viruses, and bacteria, acting as pesticides, examples include Bacillus, Beauveria, and Trichoderma
- Natural molecules with pesticidal properties, such as entomotoxic salts
- Plant extracts, such as neem, pyrethrum, and others, as appropriate
- Biological seed treatment, including a classification of technologies used as protectants and stimulants. Examples include Bacillus, Trichoderma, pseudomonas, and Trichoderma
- Phytosterols

**Ingredients included:**

- Microbial species, such as beneficial fungi, viruses, and bacteria, acting as pesticides, examples include Bacillus, Beauveria, and Trichoderma
- Natural molecules with pesticidal properties, such as entomotoxic salts
- Plant extracts, including neem, pyrethrum, and others, as appropriate
- Minerals including copper and sulfur
- Biochemicals including Steroids, Amino acids, and phytonomones

**Features + Timing:**  
Base year: 2021  
2021 4th Edition  
Published: NOV 2022

**Kline + Company offers:**

- A highly reliable and independent assessment of current brand sales, emerging technologies, and company positions
- Forecast outlook for the next five years for each crop segment, and insights into new technologies and expected market developments
- An interactive database that will allow manufacturers and marketers to customize data to fit their needs

**Enhanced Forecasts:**

- Provides future market metrics pairing advanced data science techniques with industry expertise
- Identifies factors driving growth through analysis of macroeconomic factors and end-use segment trend indicators
- Provides up-to-date data for informed decision-making based on automated processes and refined predictions

**About Kline + Company:**  
Kline + Company is a global market intelligence and advisory firm with core competencies in the Chemicals and Agribusiness sectors. Celebrating 65 years of service in 2024, Kline empowers clients to make informed decisions that drive business growth with an unparalleled depth of industry expertise, extensive research capabilities, and data-driven insights.

Primary research techniques | Worldwide network of offices | 65 years of industry expertise

Global Biopesticides | Klinegroup.com

## Biopesticides Emerging Markets 2024 (7 countries)

**Global Biopesticides**  
Natural Pesticides In Emerging Markets

The report provides an analysis of the growing biopesticides market. It includes technology descriptions, competitive landscape, and end-use analysis of product segments, while providing an outlook and product category forecast for each country/market segment and company.

**Regional Coverage:** Americas, Europe, Bulgaria, Hungary, Netherlands, Poland, Turkey

**Scope:**

- Biopesticides market status for each country
- State segment for each country by crop or application
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- Biochemicals including Steroids, Amino acids, and phytonomones

**Features + Timing:**  
Base year: 2024  
2024 5th Edition  
Published: Q4 2024

**Kline + Company offers:**

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Global Biopesticides | Klinegroup.com

## Global Biostimulants and Fertilizer 2015, 2018, 2022, 2026 (9 countries)

**Biostimulants and Biofertilizers**  
Global Overview of the Market and Use

This report provides a window into the growing market segment of the crop protection sector. It includes technology, product descriptions, crop targets, and most importantly, an outlook with forecast for each market segment.

**Regional Coverage:** Americas, Europe, Asia, China, India, Korea, South Africa, France

**Scope:**

- This report covers sales of biostimulants and biofertilizers, including inoculants, seed treatment products
- Sales are segmented by crop types
- Outlook for future technologies in development
- Forecast to 2027

**Technologies included:**

- Bacteria
- Microelements
- Botanical extracts
- Chitosan
- Fungi
- Humic Substances
- Inoculants
- Protein hydrolysates, including amino acids
- Seaweed extracts
- Mixtures of ingredients

**Features + Timing:**  
Base year: 2022  
2022 3rd Edition  
Published: JAN 2023

**Kline + Company offers:**

- A highly reliable and independent assessment of current brand sales, emerging technologies, and company positions
- A look at estimates sales by brand, active ingredient, and supplier for each country and crop segment covered
- An interactive database which allows manufacturers and marketers to refine data to fit their needs

**Enhanced Forecasts:**

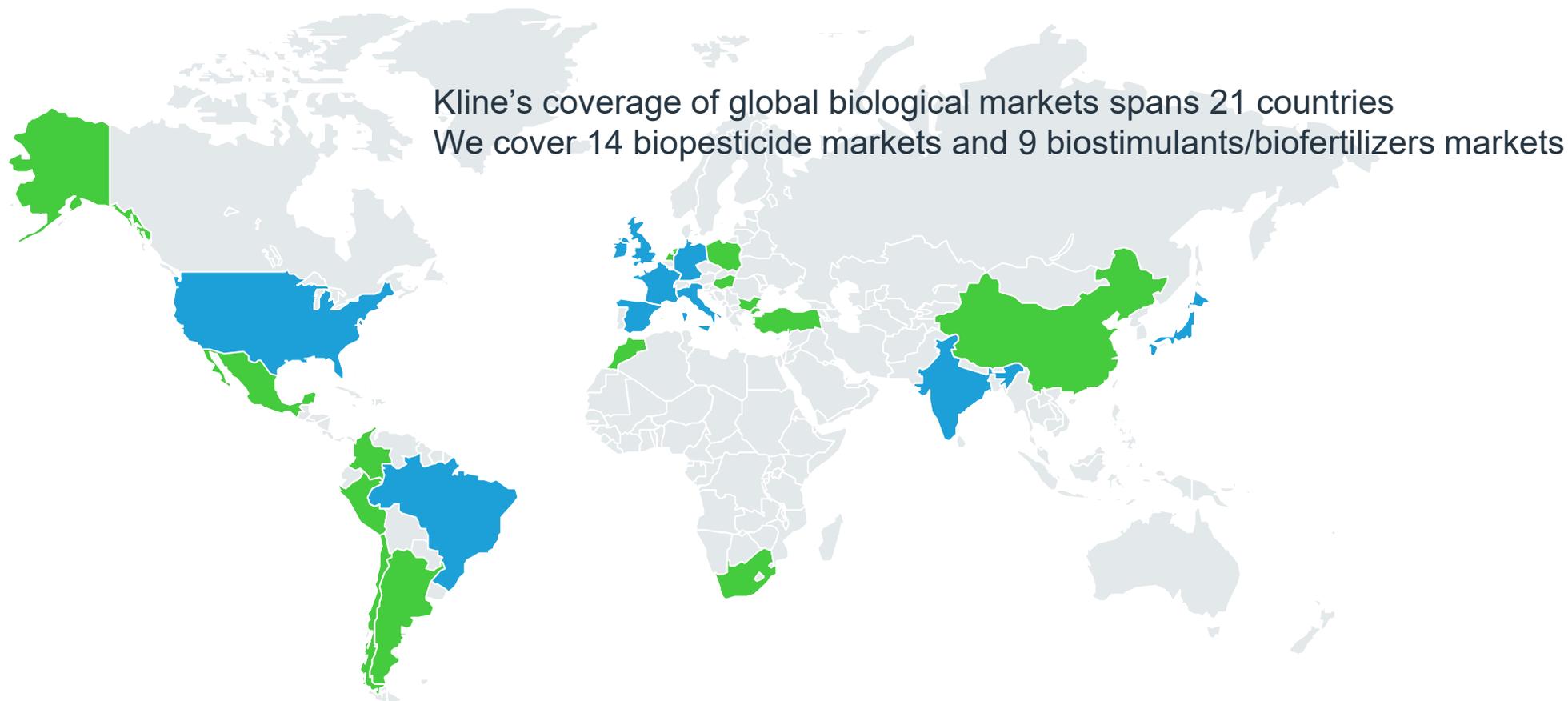
- Provides future market metrics pairing advanced data science techniques with industry expertise
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Global Biopesticides and Biofertilizers | Klinegroup.com

## Scope

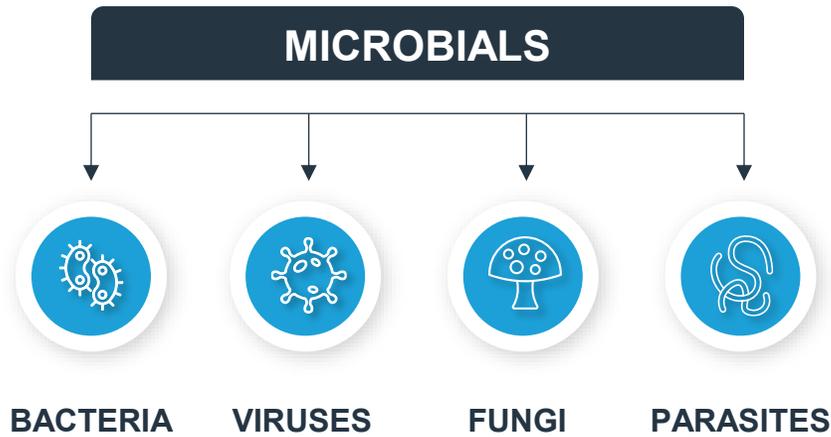


### 21 COUNTRIES COVERED

- |          |                |            |               |         |           |
|----------|----------------|------------|---------------|---------|-----------|
| + Mexico | + South Africa | + Bulgaria | + Turkey      | + U.S.  | + Germany |
| + Chile  | + Morocco      | + Colombia | + Netherlands | + U.K.  | + India   |
| + Brazil | + Argentina    | + Hungary  |               | + Spain | + Japan   |
| + China  |                | + Poland   |               | + Italy | + France  |

# Scope

- Kline + Company’s Agrochemicals practice has conducted several studies on biopesticides and biostimulants/biofertilizers. Our data presents the market according to the following categories and classifications:



Biological Coverage			
Biopesticide Category	Biopesticide Type	Biostimulant Category	Examples of active ingredients
Microbials	Bacteria, fungi, and viruses	Seaweed extracts	Algae, <i>Ascophyllum nodosum</i> , kelp, ecklonia maxima, and sargassum weightii
Biochemicals	Pheromones, abamectin, spinosad, and many others	Beneficial fungi	<i>Trichoderma sp</i> , <i>Glomus intraradices</i> , <i>mycorrhizae</i> , and <i>penicillium</i> , among others
Minerals	Copper, sulfur, iron, and others	Humic substances	Humic acids and fulvic acids
Botanical	Orange oil, neem and other plant extracts	Bionutrients	Silica, manganese, magnesium, and zinc, among many others
All other	Other biologicals	Botanical extracts	Plant extracts such as neem and many others
NOTE: Macrobiologicals are excluded		Protein hydrolysates	Amino acids and betaines
		Beneficial bacteria	Bacteria species including <i>bacillus</i> , <i>rhizobium</i> , and <i>bradyrhizobium</i> , and others.
		Mixtures	Mixtures of ingredients from different categories
		Others	Biosolids, chitosan, and enzymes



# Kline's Methodology

## PRIMARY RESEARCH



Kline research leans heavily on in-depth interviews conducted for each report.

Kline regularly attends trade shows and conferences.

We have local experts/researchers fluent in native languages, and our interviews engage hands-on experts across all pertinent fields, including:

- Suppliers/manufacturers
- Distributors
- End users
- Opinion leaders/research institutes
- Government agencies
- Trade organizations/extension agents

## SECONDARY RESEARCH



Our team supports primary research with constant tracking of annual company reports, national statistics bureaus, and trade/industrial/professional associations.

New developments are diligently followed and their market impacts closely monitored.

## BUSINESS INTELLIGENCE



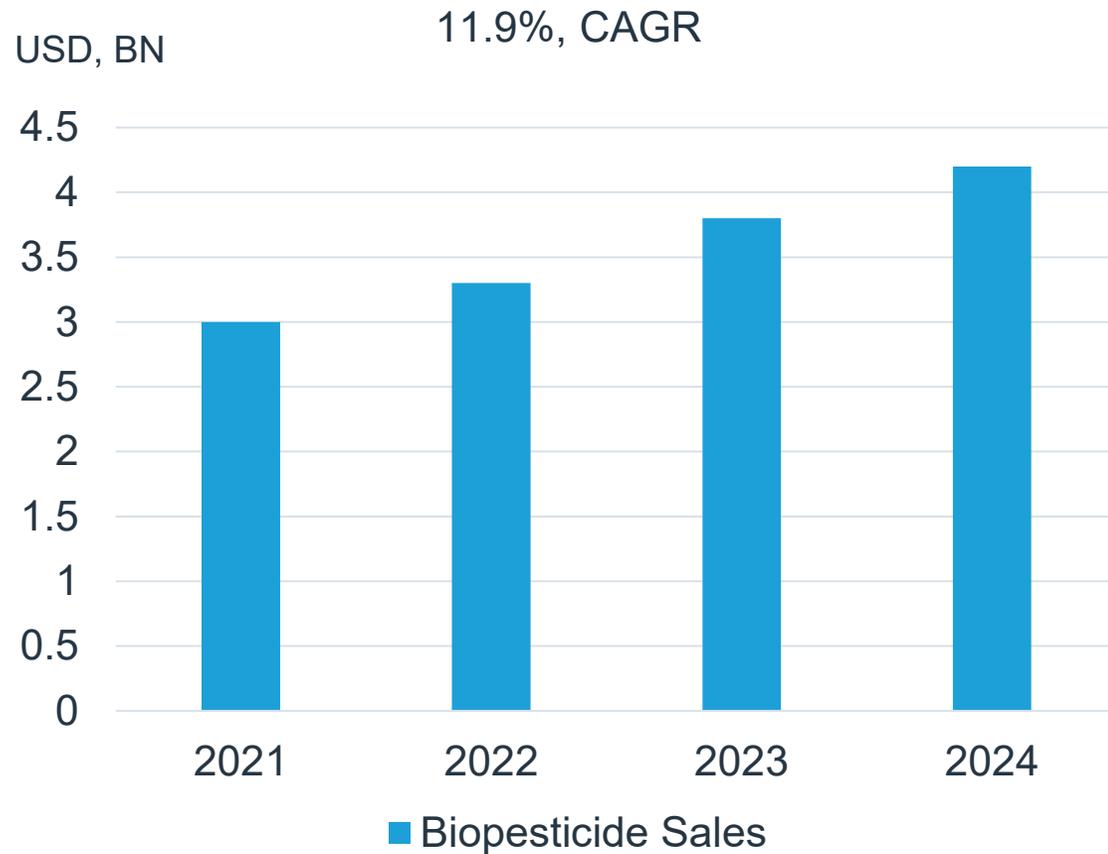
Interviews and conversations with the main players within each field, together with our rigorous analyses and cross checks, create insightful and comprehensive market intelligence.

# Biological Market Size and Trends



# Global Biological Market is Valued at ~ USD 7 bn (~EUR 6 bn), 12% CAGR 2021-2024

## Biopesticide Sales, 21 Markets



## Biostimulant Sales, 9 Markets



## Market Growth Boosted by Key Trends



### DRIVERS

The industry has grown from niche to mainstream with better awareness and trust in product efficacy driven by six major trends including:



Sustainability and organic farming



Expansion and mainstream adoption by growers



Global trade



Regulatory support and fast-track approvals



Technological innovation

# Market Challenges

## RESTRAINTS



Despite growth, there are some restraints and lags when it comes to adoption of new technologies:



Currency exchange rate volatility, economic disruptions, conflict in Ukraine, shifting trade policies can disrupt supply and pricing of imported inputs.



Farmers may be cautious and skeptical about biopesticides due to their slower action, narrow-spectrum activity, and inconsistent performance. Many are comfortable staying with familiar synthetic products.



Biologicals are more expensive, and farmers of lower-valued crops or crops grown for domestic sale may try to limit input costs.



Price gap limits adoption in cost-sensitive crop production systems, especially where growers operate with tight margins.



Challenges implementing new regulations and following sustainability goals.

## Biologicals are Used Predominantly on Higher Margin Crops



**Vegetables** are one of the leading crop groups for biological use where they are often used on crops for export.



**Fruit and nuts** such as citrus, berries, stone fruits, table grapes, avocados, bananas, cherries, and nuts are high-value crops and another large use case for biologicals



**Specialty crops** ornamentals, olives, coffee, potatoes, tea, and vineyards are high margin crops where biologicals are used



**Field crops** corn, wheat, soybeans however usage of biologicals is more limited than fruit and vegetables.



**Seed treatment** used on multiple crops especially field crops such as soy, corn, wheat, and cotton.



**Non-crop** Turf and forestry represent a small portion of the global market. U.S. market is seeing growth in non-crop applications, one-third in pest control

# Growth Driven by Government Support, Export Markets, Streamlined Registration, Bans on Synthetic Ingredients, New Technologies

	USA 	BRAZIL 	INDIA 	CHINA 	SPAIN 
<b>Gov. Support</b>	USDA's Organic Transition Initiative <b>supports farmers in transitioning to organic practices</b> , including the use of biopesticides	National Bio-inputs Program <b>incentivizes research</b> and innovation for biologicals	National Mission on Natural Farming is promoting chemical-free farming among <b>ten million farmers</b> , supported by over 10,000 Bio-Input Resource Centers.	Simplified Dossiers for Biologicals: MARA (Ministry of Agriculture and Rural Affairs)'s e-certification system and <b>streamlined requirements</b> let developers file directly and speed approvals for biopesticides versus chemical products.	Spain's framework of the CAP (2023-2027), which is implemented via <b>Spain's Strategic Plan</b> includes key government initiatives like support through basic payments, with additional redistributive payments for small and medium farms, and complementary aid for young farmers.
<b>Exports and Easier registration</b>	Export-focused crops like grapes, almonds, leafy greens, and berries are leading since they need to adhere to strict Maximum Residue Limits (MRLs). <b>Fruit and nuts, seed treatments, and vegetables are the largest crops</b> , driven by a mix of crop-specific requirements, market demands, and regulatory pressure.	Modernized regulations to streamline the registration process has <b>increased the number of registered biopesticides</b> in Brazil from 433 in 2021 to over 500 in 2025.	EU further lowered MRL thresholds in past 2 years, particularly for imports from non-EU countries. This has created <b>increased demand</b> among Indian growers, especially those dealing with major exports such as grapes, pomegranates, tea, basmati rice, and mangoes.	High-Toxicity Pesticide Phase-Out: China will ban domestic sales and use of oxydemeton-methyl, methidathion, phosme, and triazophos from December 1, 2025, forcing <b>rapid substitution with lower-toxicity and biological alternatives</b> .	A major regulatory milestone was the EU decision to <b>ban the use of abamectin in open-field agriculture</b> , restricting it to greenhouse applications only, due to its high toxicity to pollinators and soil organisms.
<b>New technologies</b>	Integrated Pest Management (IPM) practices and <b>advancements in microbial and biochemical formulations</b> , like Bacillus, are gaining popularity.	<b>Vast planted area</b> for crops such as soy, corn, sugarcane, cereals, and cotton leads to growth for biologicals	Mixtures with multiple strains like <i>Trichoderma</i> , <i>Bacillus</i> , and <i>Pseudomonas</i> to broaden pest and disease coverage, improve efficacy, and reduce need for multiple applications, making biopesticides more farmer-friendly. Formulations using <b>nanoparticles</b> of neem, karanj, and other botanicals are being researched to improve stability, absorption, and pest kill rates.	2024 Nano-Carrier Biopesticide Innovation Policy: The <b>government funds</b> next-generation nano-carrier biopesticides steering the industry toward high-performance, scalable biologicals.	Rapid growth of <b>pheromones</b> , particularly in stone fruits (where mating disruption technologies have become widely adopted; these systems offer a non-toxic, species-specific alternative to conventional insecticides, aligning well with IPM strategies and organic certification requirements.

# Innovations



# Biological Innovations and Benefits to Growers

## INNOVATION



Microbial mixtures

Seaweed extracts

Pheromones

Mycorrhizae products

## GROWER BENEFITS



Broad-spectrum control for disease suppression and plant health; reduce the number of applications needed.

Regulate stress and growth genes, enhance crop performance in challenging conditions. Blended products combine seaweed extracts with other bioactive ingredients to support resilient, climate-smart crops.

Mating disruption used to control specific pests; often used in fruits/specialty crops. Offers non-toxic, species-specific alternative to conventional insecticides, aligning well with IPM strategies and organic certification requirements.

Beneficial fungi that supports soil and root health for more resilient plants and improved crop yields

# Innovations

- **Microbial products:**

- Advanced combinations of beneficial microbes such as *Trichoderma*, *Bacillus*, plant-growth promoting rhizobacteria (PGPRs), and *Arbuscular Mycorrhizal Fungi* (AMF) enhance plant tolerance to severe heat, drought and salinity, improve nutrient uptake, and boost grain protein and nutrient quality.
- **L-2030 (Corteva)**, **Serenade (Bayer)**, **Diepl DF (Valent)**, and **Xentari (Valent)**, are recognized for broad-spectrum control in the U.S., offering disease suppression and promoting plant growth through induced systemic resistance (ISR). These brands are effective across various crops, from greenhouses to open fields.
- Leading biopesticide brands in India include **Anoka (KN Biosciences)** and **Sanjeevni** and **Kalichakra-L** from **IPL Biologicals Limited**, that are blends of *Trichoderma viride* and *Pseudomonas fluorescens*.
- Nano-pesticide based innovations are being developed in China. E.g., Bangnongda, in partnership with Chinese Academy of Agricultural Sciences, is developing water-based, ionic-liquid single-molecule nano-pesticide delivery system that boosts penetration and cuts field use by 30–45%. This work has resulted in micro/nano suspension of *Bacillus subtilis* brands like **Sida Diweishi (Anhui Sida Pesticide Chemicals Co.)**

- **Pheromones:**

- **Isonet** by ShinEtsu Pheromones and sold through CBC Biogard in Spain. Used on vineyards, tomatoes, and peaches and other stone fruits to protect from European grapevine moth, tomato leaf miner, and peach twig borer by disrupting mating of these pests.
- **Anartec** by SEDQ Healthy Crops also used as a mating disruptor to protect peaches and stone fruits from the peach twig borer.





## Innovations

- **Seaweed-based products:**
  - Leverage improved extraction and purification techniques to retain more bioactive compounds. Such extracts can regulate stress and growth genes, enhancing crop performance under challenging conditions. Blended products that combine seaweed extracts with other bioactive ingredients to support resilient, climate-smart agriculture.
  - Examples in the U.S. include Acadian Seaplants' **Stimplex**, a pure *Ascophyllum nodosum* extract; Oceans Organics' **Stress RX**, a seaweed extract formulated for stress tolerance; and Oceans Organics' **Guarantee Green**, a seaweed-based foliar biostimulant sold in the U.S. and other global markets.
- **Mycorrhizae products:**
  - Beneficial fungi products are mixed with multiple strains or with microbial ingredients such as *Bacillus* to help enhance soil and root health.
  - Usage of these products can be an effective tool in areas where severe weather conditions exist such as high salinity and draught
  - Examples include products like **Aegis** (Hello Nature) mixture of mycorrhizaefungi, peptides and hydrolyzed proteins; Panoramix (Reka) which mix with *Bacillus* and **Compete Plus** (Lebanon Turf) are mixtures of beneficial microbes that support plant health.

# Leading Suppliers



## Biologicals Market is Highly Fragmented with Many Suppliers

- Each country has a diverse mix of major global agrochemical suppliers, and many local suppliers
- **Corteva** has invested heavily in expanding its presence in biologicals, acquiring **Symborg** and **Stoller**
- **Bayer** been investing in its biological portfolio, announcing strategic partnerships with companies such as **Ginkgo Bioworks** and **Kimitec**
- **Koppert**, focuses solely on biological solutions. In 2024, HAL Investments became a strategic investing partner, investing ~EUR 140 million in capital to help the company grow globally

# Appendix



## Kline has published agrochemical studies for over 50 years

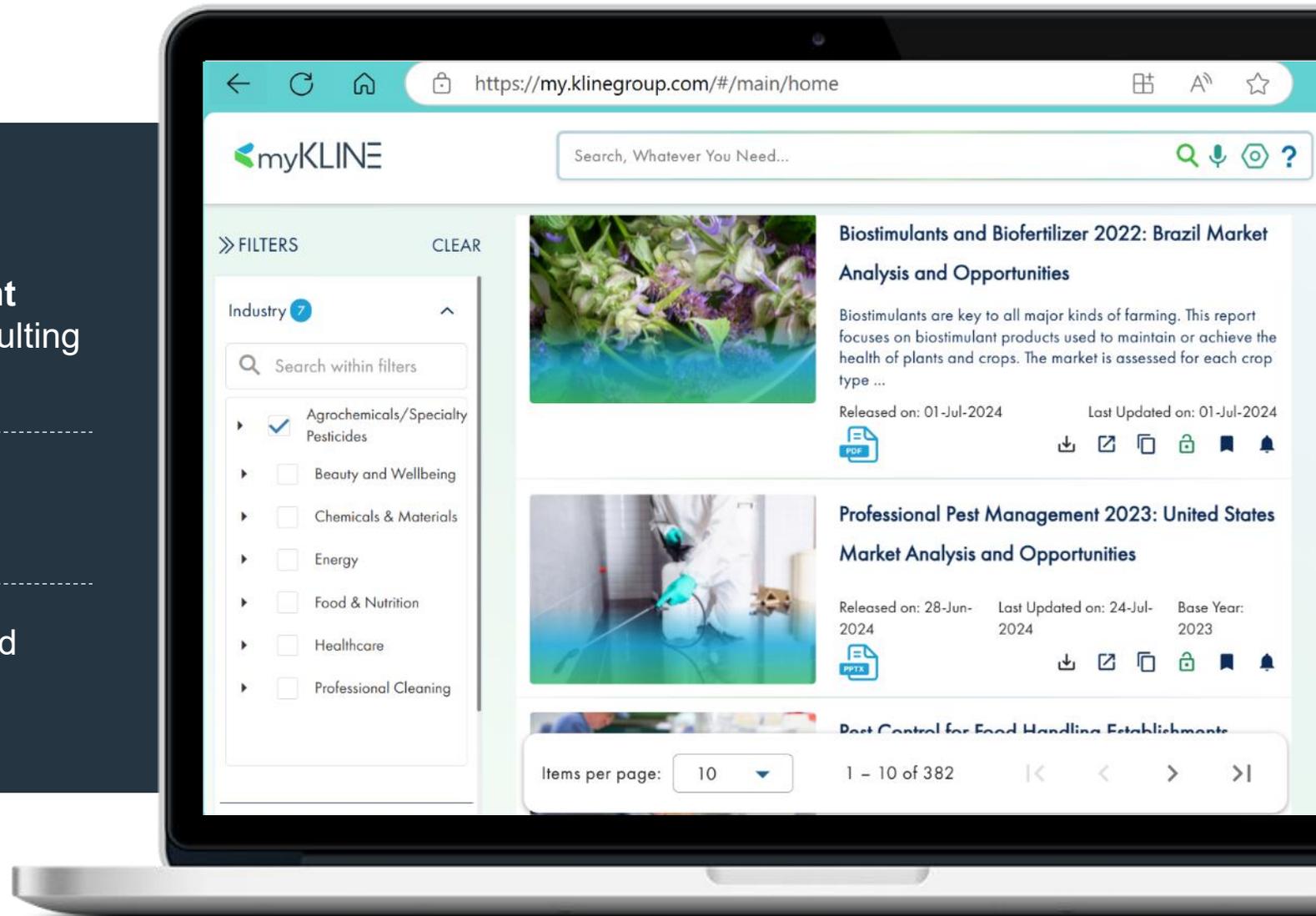
- Dec 2025 Global Biostimulants and Biofertilizers U.S.
- Dec 2025 Mosquito Control Markets U.S.
- Sep 2025 Biopesticides Core Countries
- Aug 2025 Turf & Ornamental U.S. Market for Pesticides & Fertilizers
- Mar 2025 Leading Distributors in the U.S. Crop Protection Industry
- Dec 2024 Biopesticides Emerging Markets
- Aug 2024 Stored Grain Pest Control U.S.
- Jul 2024 Industrial Vegetation Management Pesticides Mexico + Brazil
- Jun 2024 Professional Pest Management Products U.S. 2023
- Jun 2024 Pest Control in Food Handling Establishments U.S. 2023
- Jun 2024 Seed Treatment U.S.
- Mar 2024 Professional Pest Management Pesticides: Spain & France
- Jan 2024 Consumer Markets for Pesticides Brazil
- Dec 2023 Professional Pest Management Pesticides Argentina
- Aug 2023 Professional Pest Management Pesticides Brazil
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- Jan 2023 Rodent Control U.S.
- Jan 2023 Plant Growth Regulators U.S.
- Nov 2022 Pest Control in Animal Health U.S. + SE Asia
- Sep 2022 Supplier Incentive Programs in U.S. Crop Protection

## Our digital delivery platform:



### Always-On Client Access

- + myKline, is Kline's delivery vehicle for **client access** to all reports, databases, and consulting projects purchased from Kline
- + Powered by a **best-in-class knowledge management platform**
- + **Always-on** technical support, research, and industry expert access



# Our databases allow you to sort, filter, and aggregate intel to answer questions about the use of active ingredients by supplier + brand for each application in each country

**Illustrative Example**



Region ▼ Product Form ▼ Country ▼ ActiveIngredient Category ▼ End Use Segment ▼

Price, USD per (L/Kg) Use Rate, (L/Kg)/ ha Area Treated, thousand ha Sales, USD thousand Volume, Liter thousand Mass, Kilogram thousand Year ▼

2024

Crop Group	Crop	Product Type	Biopesticide	Active Ingredient	Supplier	Brand	Price, USD per (L/Kg)	Use Rate, (L/Kg)/ ha	Area Treated, thousand ha	Sales, USD thousand	Volume, Liter thousand	Mass, Kilogram thousand	
Field	All other	Fungicide	<input type="checkbox"/>										
		Insecticide	<input type="checkbox"/>										
		Insecticide/Acaricide	<input type="checkbox"/>										
		Pheromones	<input type="checkbox"/>										
		Plant hormone regulator	<input type="checkbox"/>										
	Corn			<input type="checkbox"/>									
				<input type="checkbox"/>									
				<input type="checkbox"/>									
				<input type="checkbox"/>									
				<input type="checkbox"/>									
Non-crop	Forestry		<input type="checkbox"/>										
Orchard			<input type="checkbox"/>										
Seed treatment			<input type="checkbox"/>										
Specialty	All other		<input type="checkbox"/>										
	Cacao		<input type="checkbox"/>										
	Coffee		<input type="checkbox"/>										
	Floriculture		<input type="checkbox"/>										
	Other specialty		<input type="checkbox"/>										
	Potatoes		<input type="checkbox"/>										
	Quinoa		<input type="checkbox"/>										
Tobacco		<input type="checkbox"/>											
Vineyards		<input type="checkbox"/>											
Vegetables			<input type="checkbox"/>										

Search

Select All

Bacteria

Biochemical

Botanical

Enzymes

Fungi

Mineral

Protein

OK Cancel

# Recently Published + Upcoming studies from Kline's Agrochemicals team

## ▶ Biopesticides Core Markets

September 2025



## ▶ Mosquito Control U.S.

December 2025



## ▶ Biostimulants Core Countries

Q2 2026  
U.S. Q4 2025



## ▶ Professional Turf & Ornamental U.S.

July 2025



## ▶ Industrial Vegetation Management

Q3 2026



## ▶ Nematicides

Q3 2026



## ▶ Seed Treatment U.S.

Q4 2023



## ▶ Leading Distributors in Crop Protection U.S.

Q1 2026



## ▶ Animal Health Pest Control

Q4 2026



# In addition to Kline's syndicated products, our team provides a wide range of advisory services to help clients enhance competitiveness and achieve long-term growth



## Competitor Analysis & Insights

- Company overview
- Key, high-level financials
- Assets, Product portfolio
- Marketing, R&D, Innovation
- Growth strategies and acquisition/alliances
- Operational strategies
- Forward-looking view



## Market Insights

- Current supply/demand
- Market segmentation by application
- Market Trends and Drivers, VOC surveys
- Current suppliers and their market position
- Market forecast



## Technology And Innovation

- Portfolio optimization
- Technology evaluation and commercialization
- Technology search
- R&D organization and processes



## Manufacturing And Supply Chain

- Competitive manufacturing cost benchmarking
- Operational effectiveness/cost reduction
- End-to-end supply chain analysis



## Strategy And Business Development

- Market opportunities
- Business unit strategies
- New business entry
- M&A and investment due diligence
- Competitor analysis

**Our project teams are staffed with seasoned management consultants and operating executives from the specific industry segment**

✓ Agrochemicals

✓ Chemicals & Materials

✓ Biocontrol

Kline + Company is a global market intelligence and advisory firm with core competencies in the Chemicals, Energy, and Beauty sectors. With more than six decades of experience, Kline empowers clients to make informed decisions that drive business growth with an unparalleled depth of industry expertise, extensive research capabilities, and data-driven insights.

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