An Interview with...

Willem Ravensberg, President of IBMA (International Biocontrol Manufacturers Association)

WILLEM RAVENSBERG

Most of IBMA's membership is from Europe at large. When put together, which percentage of the European market for biopesticides do your members represent?

Indeed, in July 2015 we had 235 members of which 115 Active members and 46 Associate members from the EU, thus roughly 70% of our members originate from Europe. The membership includes many SMEs, but also the main multinational agrochemical companies. My estimate is that we have most of the European companies active in biopesticides as a member of IBMA, probably over 90% of all players. We do not have members from the industry active with generic plant protection products.

Regarding the market share of biopesticides, current and reliable numbers are difficult to find, the estimate is still below 5% of sales of all pesticides. IBMA will hold a survey under members during the second part of this year to enquire about turnover in biopesticides, jobs and economic activities. We need the data to illustrate the importance of our growing industry to policy makers.

IBMA has developed good working collaborations with other biocontrol associations such as BPIA, ANBP, IOBC, ABC Bio, etc. Where do you stand with the set-up of the International Federation and what will be the main purpose of this organization?

We have had the inaugural symposium of the Federation in March this year in Fresno, California. We are still developing a structure of the new organization. We will have a meeting again in October after ABIM in Basel. This will be an annual meeting. The subjects of the new federation is to cover common issues that all associations face globally. We have defined three common objectives. These are to harmonize regulatory decisions and acceptance, identify and engage with IGOs, NGOs and other global and regional partners, and lastly to agree and prepare standby statements for our industry.

Although most of the biocontrol companies are still small with limited resources, we have witnessed again a few major changes during this year. In less than five years, the biopesticide industry seems to have reached a concentration almost unheard of: Do you see the trend continuing, including in Europe?

I expect that this trend will continue, although in Europe with less acquisitions than in the USA. I foresee that various models of collaboration will continue to develop, with partnerships in R & D, in production and formulation arrangements, in distribution agreements, worldwide or in regions, etc.

In the past we have seen a strong consolidation of companies in the agrochemical industry as well as in the seed industry. I expect this to happen as well in the biopesticide (and biostimulant) world, but at a slow pace. It took decades in the above mentioned industries, and I anticipate a similar speed in our industry. As biopesticides will play an increasing role in the portfolio of the larger players, they will try to catch up with the developments and invest capital in this sector by buying others. Alongside this there will be independent players as investment in product pipeline does not require as much money as for synthetic chemicals. I think distribution networks will be the main drivers for consolidation rather than rationalization of R & D expenses.

Again in 2015, a number of R&D companies, mainly focusing on microbials, have been acquired at substantial prices by bigger Groups although most of them do not seem to have a potential commercial product coming out in the market in the foreseeable future! Do you think this is a sign that the share of Microbial biopesticides will continue to grow in the medium term, meaning other substances such as natural extracts in particular, will continue to remain marginal?

The focus on microbials seem to be partly driven by underlying technology such as DNA, and maybe RNA knowledge and IP in these areas. A link to genetically modified plants is obvious. Secondly, there could be a link with the production technology, e.g. fermentation, which is in-house technology for some manufacturers. Think of products like spinosins which are derived from the production of a microorganism. This also refers to metabolites produced by microorganisms since knowledge of chemicals in the agrochemical industry is core competence. However, the potential of plant extracts is enormous and I am sure products based on them will also be developed.

When will a relevant portfolio of bioherbicides exist?

That is a very interesting area of course, looking from the potential market. Research attempts in the past focused predominantly on plant pathogens, but these have failed largely. Other measures have been developed, mainly mechanical, which are used in organic agriculture, and will get more attention in IPM programmes. At the same time weeds may be valued differently in the future, as part of ecosystem services, and functional agrobiodiversity. New products will surely be developed as natural herbicides, the question is when and what kind.

When we last spoke a year ago, the regulation of biopesticides in Europe seemed to be on a very slow track, not to say in a dead end! Is it still the case today or has any progress been done? How many of the 54 pending registrations for active substances have now got registration?

We have the new regulation 1107/2009 since June 2011, about four years. That means that pending registrations were partly submitted under the old regime, and partly under 1107/2009. Judging from the outside there are no large changes, but behind the scenes many developments have and are taking place in which IBMA is also involved. The main one is developing guidance documents (GD). This is done by working groups of the EU and/or OECD. Examples are the GD for botanicals, on semiochemicals (in progress), and metabolites (in progress). The main benefit lies in the process of making these GDs where experts of member states, EFSA and IBMA come together and where the dialogue is more open and expertise is shared and built up. The dialogue is taking place in an EU Expert Working Group on Biopesticides and an Expert Working Group on Low-risk Criteria. This improves the understanding of biopesticides and the risk assessment at all levels. I see how this slowly creates a better regulatory environment for our kind of products. More importantly IBMA is lobbying for criteria for low-risk substances and products and for improved procedures including a fast track process. This new process would provide a substantial improvement with regard to timelines and return of investment. We are not there yet but have seen the first three products go through the standing committee as low-risk and are working towards categorising those already approved substances as low-risk.

The 54 pending substances are still partly not fully approved and we share common issues with synthetic chemicals regarding adherence to timelines, mutual recognition and zonal authorizations.

Any progress in the acceptance by the EU of lepidopteran pheromones as one group of actives?

The Straight Chain Lepidopteran Pheromones have now been accepted as one group of active substances. Any new SCLP within this range will be assessed for conformity within the group and noted as SCLPs.

By joining forces with New Ag International and 2B Monthly to co-organize a Biocontrol conference in India, Biocontrol Asia2015, earlier in March this year, IBMA showed a clear interest in a part of the world that has not been a priority for the organization although in Asia there are as many Biocontrol companies as the whole Western world together. Have you been satisfied with the outcome of this inaugural conference? Has it resulted in new potential membership at IBMA?

Biocontrol Asia was a very good meeting, some world players were present as were many Indian companies. However, we lacked producers from other Asian countries. The Chinese industry was notably absent. It is clear that biocontrol is also rapidly gaining momentum in Asia and surely a follow up of this conference will be useful.

We have a few new members from India following the meeting in Delhi. Also our contacts with PMFAI have improved and we are considering a stronger collaboration.

In November 2016, we will be joining forces again to organize the inaugural Biocontrol Latin America conference in Brazil. Do you see this event attracting more people than the Asia conference and is the market in the region more dynamic and advanced than the Asia one?

I am looking forward to having this meeting also in Latin America where biocontrol is rapidly growing. We should learn from the Asia conference and attract not only players active in Brazil, but also from other Latam countries. The potential in South-America for biocontrol is enormous and the business model different from Asia. Therefore I expect a large attendance and a very interesting conference with many examples of biocontrol used in practice, and boundless opportunities.