IBMA Activity Update since 11th JMPM

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Regional > Global Biocontrol Market

**2018 Regional Key Stats**

- **USA/Canada**: $1.2 Bn
- **LatAm**: $0.7 Bn
- **Europe**: $1.0 Bn
- **Asia Pac**: $0.5 Bn
- **ROW**: $0.08 Bn

**Regional Market Shares 2018/2025**
- **2018**: 31% USA/Canada, 22% Europe, 18% Asia/Pac, 18% LatAm, 16% ROW
- **2025**: 31% USA/Canada, 22% Europe, 18% Asia/Pac, 18% LatAm, 16% ROW

**Regional CAGR**

- **North Am**: 16.5%
- **LatAm**: 16.5%
- **Europe**: 16.4%
- **Asia/Pac**: 16.3%
- **ROW**: 16.2%
- **Global**: 16.4%

**Biological Control—Sustainable Growth Globally**—16.4%–16.5% (cagr)

- USA/Canada is the largest region and is projected to maintain that position until 2022, when Europe is projected to surpass the USA/Canada region in sales value.
- Europe has had a very challenging regulatory environment and DunhamTrimmer believes this has stifled growth in Europe; however, we expect the regulatory environment to greatly improve during the projected timeframe.
- LatAm is by far projected to have the highest CAGR during the forecasted timeframe. This is mainly to the expected entrance of biocontrol into row crops and cereals in Brazil.
- Asia-Pac is the most difficult region to project accurately due to the diversity of the countries, regulatory regulations, government policies and how biocontrol is defined. However, DunhamTrimmer expects the present growth to continue and likely increase in the 2020’s, but not to the degree as in LatAm.

August 2019
Biocontrol’s Position in Plant Protection Market

Biocontrol in the Protection Market 2017

- **Global Crop Protection**
  - Biocontrol: 5.6% (94.4%)
  - Conventional: 90.1%

- **Without Herbicides & Bioherbicides**
  - Biocontrol: 9.0% (90%)
  - Conventional: 81.6%

- **Fruits & Veggies**
  - Biocontrol: 18.4% (81.6%)
  - Conventional: 81.6%

**Biocontrol M.S. of Total Plant Protection**

\[
\text{Biocontrol M.S. of Total Plant Protection} = \frac{3.8}{(3.8 + 564)} = 5.6\%
\]

**Biocontrol M.S. of Total Plant Protection w/o Herbicides**

\[
\text{Biocontrol M.S. of Total Plant Protection w/o Herbicides} = \frac{3.8}{564 - (564 \times 40\%) + 3.8} = 9.0\%
\]

**Biocontrol M.S. of Total Plant Protection in F&V**

\[
\text{Biocontrol M.S. of Total Plant Protection in F&V} = \frac{3.8 \times 76\%}{[(564 \times 20\%) + (3.8 \times 76\%)]} = 18.4\%
\]
EU biological* PPP - active substances

TOTAL biopesticides: 134 (17) = 151  Total all PPP = 493
EU active substances (updated February 2019)*
* Definition of biological PPP not fixed so approximate numbers only
Maecenas porttitor congue massa. Fusce posuere, magna sed pulvinar ultricies, purus lectus malesuada libero, sit amet

1. Definitions

Biocontrol technologies defined – Bioprotection

Key Activities 2019

1. Definitions Document
2. Decision Trees to support Data requirements
3. Annual Biocontrol Industry Meeting

Ecology and Biology of microorganisms

DRAFT 4
Bio. Properties and Related risk areas

1. Definitions

Biocntrol technologies defined – Bioprotection

2. Decision Trees

Identify areas where risk assessment necessary and where unnecessary – focus

3. Annual Biocontrol Industry Meeting

1227 Delegates
52 Countries
536 Organizations
Current situation (1)

EU COM revising data requirements in response to continued demand by European Parliament

Revision of data requirements

IBMA Board meeting with EU DG SANTE senior level on 30th April 2019

EU Working Group on BioPesticides in May 2019

DG SANTE Pesticides Team at IBMA Annual Assembly in May 2019

IBMA Secretariat meeting with EU DG SANTE Biopesticides Team in September 2019

EU COM started work on DRs for microbials Meetings with MSs in July, August, September ...

EU COM Expert Meeting on Biopesticides – IBMA presentation on Microbials Decision Tree in November 2019
EU COM revising data requirements in response to continued demand by European Parliament

Current situation (2)

Microbials data requirements

EU COM Expert Meeting on Biopesticides – IBMA MS EU COM Further review data requirements in January 2020

EU COM Expert Meeting on Biopesticides – IBMA MS EU COM review of data requirements in May 2020

Consultation on New Data requirements in June 2019

SCoPAFF sign off October 2020
1. Biocontrol Examples
Collect and collate examples of biocontrol in reality

2. Regulatory Decision Trees
Semio-chemicals
Natural Substances

Planned Activities 2020
1. Biocontrol Examples
2. Decision Trees to support Data requirements – Natural Substances and Semio-chemicals
3. Global regulatory Harmonization Workshop to be hosted at ABIM 2020
## Bioprotection 2020

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Thank you

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