



European biopesticide market worth \$540 m in 2011

The market for biopesticides in Europe was worth \$541.4 million at the end-user level in 2011, estimates the UK consultancy, CPL Business Consultants (Wallingford, Oxfordshire). Invertebrate biocontrol agents accounted for over a third (35.1%) of the market. Sales of microbial biopesticides totalled \$73.4 million.

Biopesticides accounted for some 5% of the European agrochemical market, the company estimates. The growth in the sector came about as a result of: new product introductions; improved scientific credibility; greater user confidence; and increased pressure from the authorities for a move towards greater sustainability in agriculture. Spain was the largest biopesticide market in Europe, followed by Italy and France.

Biopesticide sales in Europe in 2011 (\$ million)		
Category	Sales	% share
Invertebrate biocontrol agents	190	35.1
Biochemicals	100	18.5
Pollinators	72.5	13.4
Semiochemicals	65	12.0
Microbial biopesticides	73.4	13.6
Plant growth regulators	32.5	6.0
Nematodes	8	1.5
Total	541.4	100

CPL estimates that the biopesticide market in Europe grew at a compound annual growth rate of 16.9% over the period 2000-2011. The highest growth at over 20% was recorded by biochemicals. They were followed by invertebrate biocontrol agents (15.6%), semiochemicals (12.1%) and microbial biopesticides (11.3%).

The consultancy found "huge variations" in the end-user price of bacterial pesticides across Europe. It cites the example of Valent BioSciences' Dipel ES (*Bacillus thuringiensis* subsp *kurstaki* HD-1), which sold for \$42.59/litre in Portugal and \$82.43/litre in Germany. Finnish company Verdera's Mycostop (*Streptomyces griseoviridis* strain K61) was three times the price in Switzerland that it is in Hungary. CPL also highlights "a significant difference" in European and US prices, with prevailing prices in Europe being much higher.

◆ Further details of the report, "Biopesticides in Europe 2013", are available from CPL at: www.cplconsult.com. E-mail: steve@cplconsult.com.

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