

AgbioInvestor

Biologicals Services

Overview - 2024



Structure of Services



AgbioNews

Agrochemical Services

AgbioCrop
AgbioSelect
AgbioChem
AgbioTrade

Seeds, Traits & Commodities Services

AgbioSeed
AgbioGuide
AgbioInvestor **GM Monitor**

Biologicals Services

AgBiological
AgbioInsight
Derived from historical market research data
BioMR
Syndicate Buy-In - Latest Data Year

Quarterly Briefing **Service**

AgbioInvestor**MR**

Special**Reports**

Agbio**Consult**

Biologicals Offering



Biologicals Services

AgBiological
Data & analysis covering the global biopesticides & biostimulants market.
→ **Product, Company and Patent Databases**

AgbioInsight
Available from May 2024 - Derived from historical market research data.

BioMR Syndicate
Syndicate Buy-In - Latest data year.

SpecialReports
Biological and biostimulant-focused Special Reports.

Related Services

AgbioConsult
Consultancy Services

AgbioInvestorMR
Cyclical, Bespoke & Biological surveys

SpecialReports





AgBiological

AgBiological is the only qualitative and quantitative report on the global biopesticide and biostimulant markets to be based on bespoke biologicals primary market research.

Market Overview

- ✓ Leading Biologicals Companies Section
- ✓ Crops & Countries Section
- ✓ Products & Research Section

- ✓ **Product Databases**
- ✓ **Company Databases**
- ✓ **Patent Databases**
- ✓ **Consultancy**

AgbiInsight

Pioneering biological and biostimulant-focused market research studies, which were conducted for the first time in 2023 and profiled the 2022 agricultural market.

The market research surveyed many key agricultural markets for biologicals, including:

BioMR Syndicate

→ **BioMR Syndicate closed**
2022 MY (delivery 2023)

North America
+ USA
+ Mexico

South America
+ Chile
+ Brazil
+ Argentina

Europe
+ France
+ Italy
+ Spain
+ Turkey

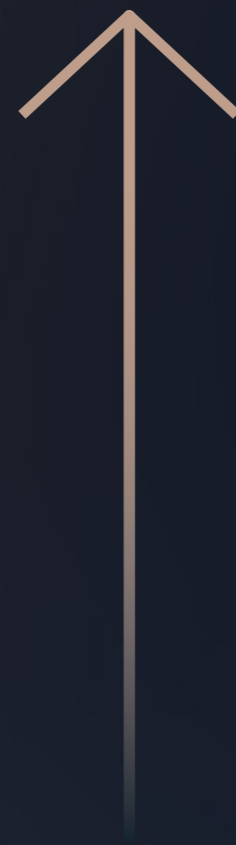
BioMR Syndicate open
2024 MY (delivery 2024-2025)

Countries
+ Repeat of previous markets +
+ India
+ Canada
+ Others (TBC)

“Top down” & “Bottom up” Analysis



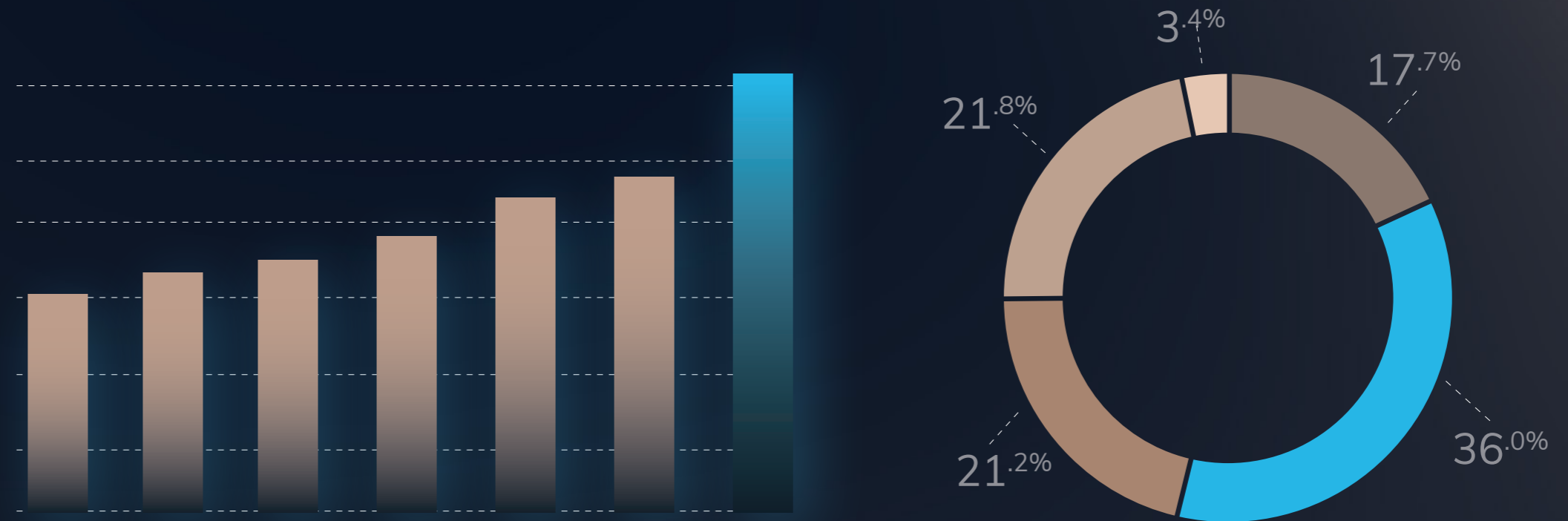
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Top down

“Top down” analysis provides market sizing at the global, country, crop and product segment level



Bottom up

“Bottom up” analysis provides granular market data in the surveyed countries down to the country, crop and product (brand) level:

- Treated Acreage
- Base Area
- Volume
- Value

Context of biologicals in the overall crop protection market



AgbioCrop

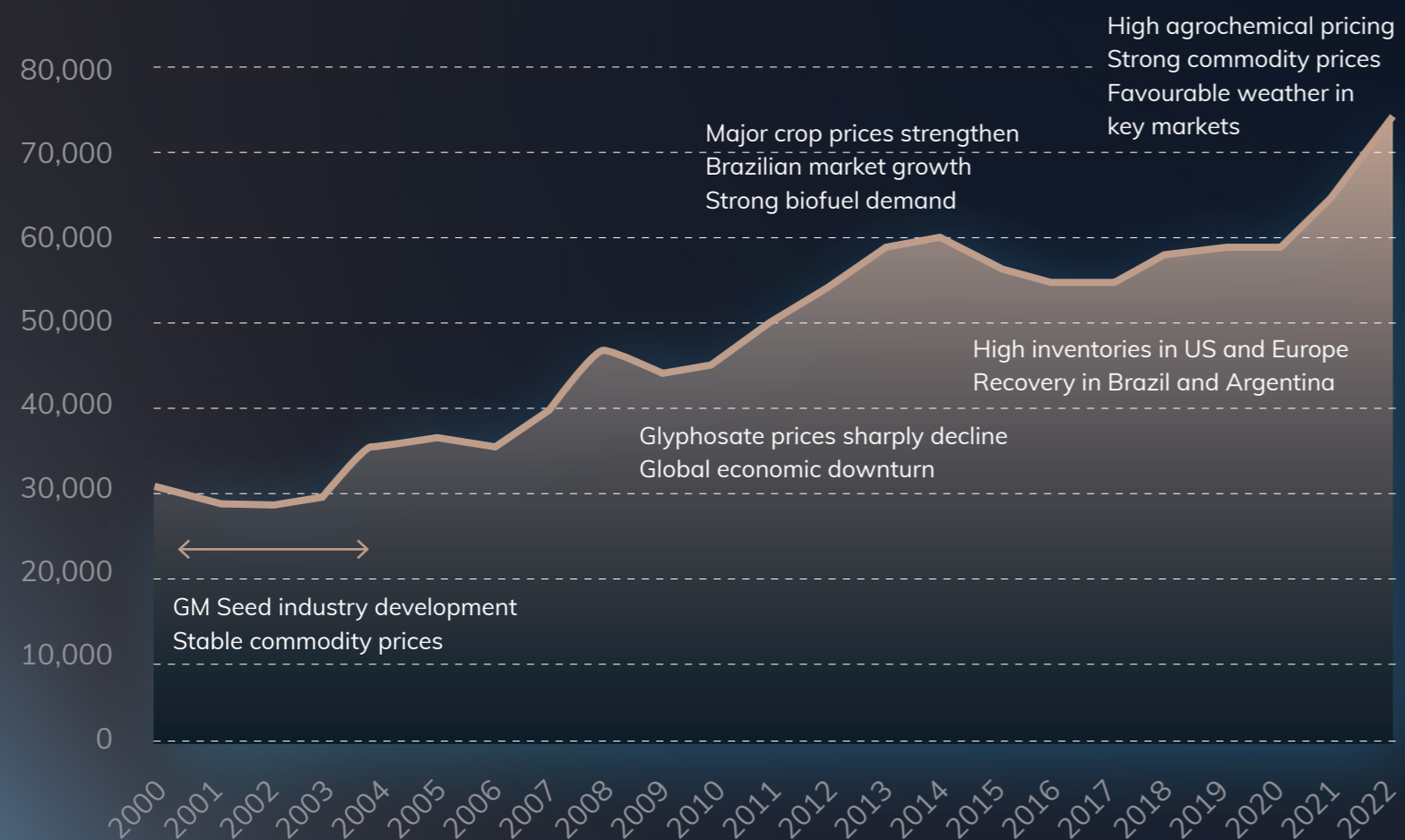
Global market trends,
Company performance,
Country market dynamics,
Crop production data & Market outlook

Integrated into AgbioInvestor's
Analysis 'Ecosystem'

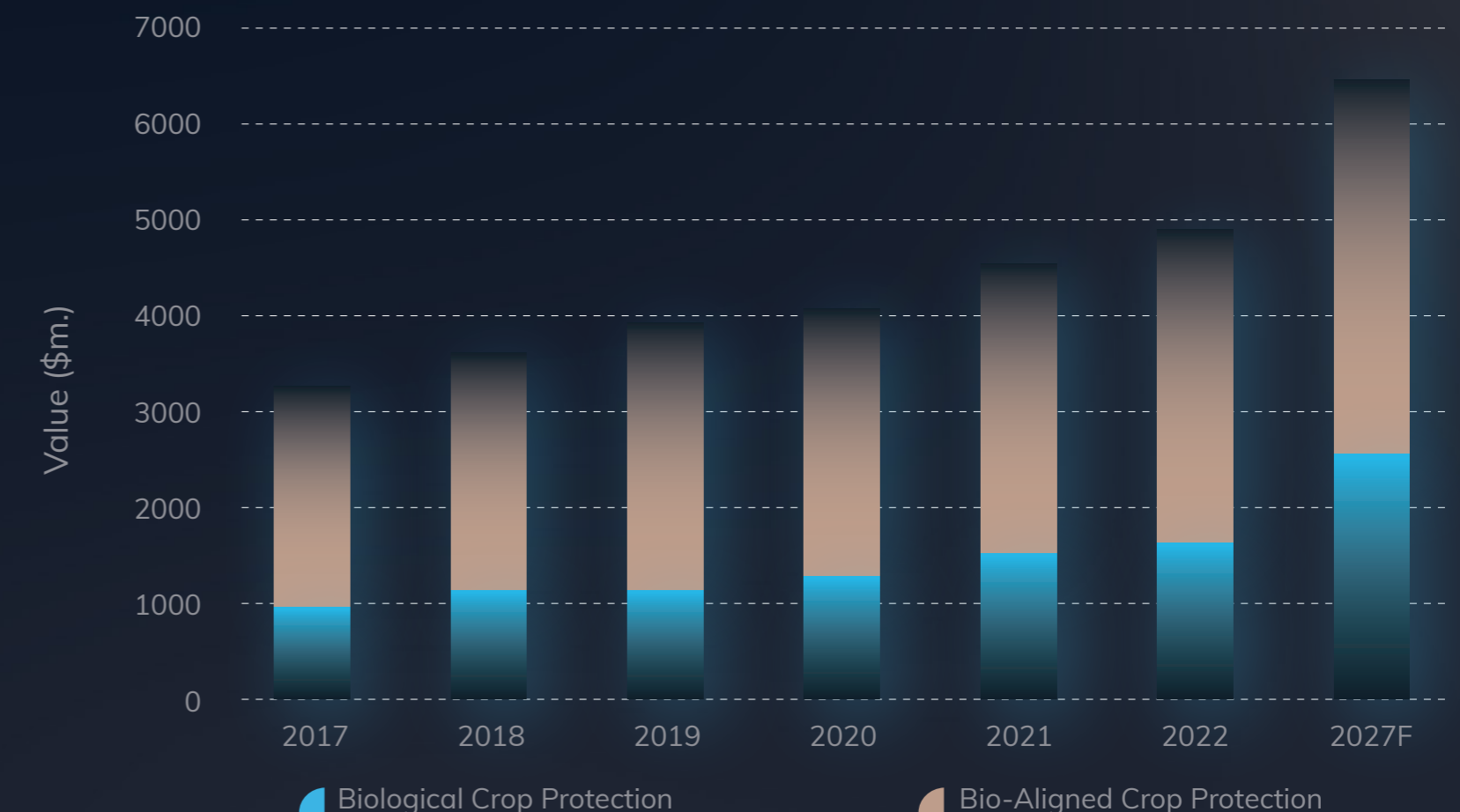
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Most comprehensive
view available on
biologicals market
dynamics

Global Chemical Crop Protection Market Development (\$m.)



Global Biopesticide CP Sales by Segment 2017-2022, 2027F (\$m.)



Non-Public Data



AgbioInvestorMR

Proprietary biopesticide and biostimulants market research.

- 9 key markets
- More markets surveyed in future studies

Surveyed markets used to validate market sizing at the country and crop level

AgbioInvestor

Wider crop protection market research data provides insight on conventional chemistries, but also the largest biopesticide products such as Bacillus thuringiensis and Bacillus firmus.



Non-Public Data + Curated and Cleaned Public Data



AgbioInvestorMR

Proprietary biopesticide and biostimulants market research.

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Surveyed markets used to validate market sizing at the country and crop level

AgbioNews

Company Biological Events
Analysis of company events

- M&A
- Licensing
- Investment
- Other company events

AgbioInvestor

Wider crop protection market research data provides insight on conventional chemistries, but also the largest biopesticide products such as Bacillus thuringiensis and Bacillus firmus.

Company Reporting

Analysis of company results provides a view on the dynamics of the market from year to year, both at a global level but also down to the regional level



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Patent Analysis

Analysis of company patent filings provides an insight on R&D portfolios and relative strength of the company's intellectual property

Feedback from Market

Engaging with crop protection industry and stakeholders e.g. conferences

Public / Governmental Sources

Information on national registrations and volume/value data where available

Acreage Changes

Wider Macroeconomic Factors

Currency, energy pricing, transportation costs, interest rates, feedstock pricing

Regulatory Factors

Sustainability goals, regulatory systems for biological products, phase out of conventional chemistries

Trade Data

Market sizing through import/export
Changes in product pricing levels

AgBiological Market Overview (May/June)



AgBiological is a multiclient report that is split into a number of sections

All sections are included within a single subscription and updated annually

Market Overview (May/June)

- ✓ Summary of global market size
- ✓ Trends
- ✓ Country and crop splits
- ✓ Product segments
- ✓ M&A Events
- ✓ Regulation trends
- ✓ Outlook



AgBiological Companies 1 (July/August)



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Companies 1 (July/August)

- ✓ Sales estimates
- ✓ Overall company performance (e.g. multinational CCP revenue)
- ✓ Product Portfolios
- ✓ Patent Activity
- ✓ Company structure
- ✓ M&A, licencing Events
- ✓ Outlook

Biological Companies Contents

Chapter

Introduction

BASF

Corteva

FMC

Bayer

UPL

Syngenta

Adama

Mitsui & Co./Certis

Sumitomo Chemical / Valent USA

Sumitomo Corporation

Sipcam Oxon

OAT Agrio



AgBiological Companies 2 (September/October)



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Companies 2 (September/October)

- ✓ Sales estimates
- ✓ Overall company performance (e.g. multinational CCP revenue)
- ✓ Product Portfolios
- ✓ Patent Activity
- ✓ Company structure
- ✓ M&A, licencing Events
- ✓ Outlook

Biological Companies Contents

Chapter

Microbial Companies

Koppert
Simbiose Agrotecnologia Biologica
Andermatt
Lallemand
AgBiome

Natural Product Companies

SBM
STK Bio-ag Technologies
Botanical Solutions Inc

Macrobial Companies

Biobest
InVivo
Agrobio
Biobee

Semiochemicals Companies

Suterra
Shin Etsu
Scentry Biologicals

Biostimulants Companies

Pivot Bio
SICIT Group
Rovensa
De Sangosse
Brandt
Acadian
Verdesian
AgriLife
Vittia Group
Biostadt
Bioceres Crop Solutions
Biogard
Stanes
Nitro Quimica
Novozymes
Mosaic Biosciences
Timac

AgBiological Country / Crop (September/October)

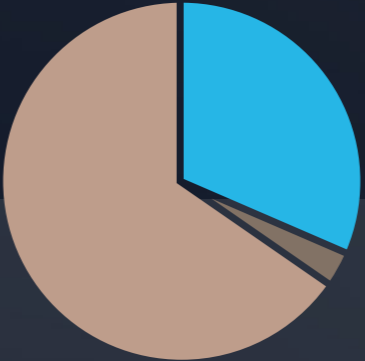


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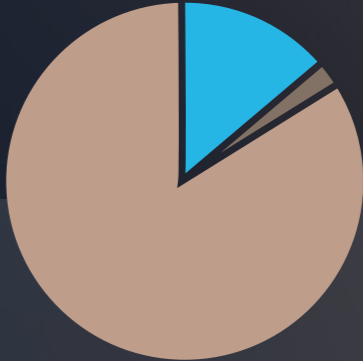
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Country / Crop (September/October)

- ✓ Country market estimates (ex-manufacturer)
- ✓ Crop market splits (ex-manufacturer)
- ✓ Organic acreage/legislation
- ✓ Plant acreage
- ✓ Biopesticide and biostimulant regulation
- ✓ Outlook



Biopesticides



Biostimulants

F&V Other Crops Row Crops F&V Other Crops Row Crops

Ex-manufacturer Value \$m.	Biopesticides		Biostimulants & Speciality Fertiliser		Grand Total
	Bio-aligned	Bio-pesticides	Bio-aligned	Biostimulants	
Market Research	0.0	0.0	0.0	0.0	0.0
F&V	0.0	0.0	0.0	0.0	0.0
Horticulture	0.0	0.0	0.0	0.0	0.0
Pome / Stone Fruit	0.0	0.0	0.0	0.0	0.0
Tree Nuts	0.0	0.0	0.0	0.0	0.0
Vine	0.0	0.0	0.0	0.0	0.0
Row Crops	0.0	0.0	0.0	0.0	0.0
Cotton	0.0	0.0	0.0	0.0	0.0
Maize	0.0	0.0	0.0	0.0	0.0
Soybean	0.0	0.0	0.0	0.0	0.0
Modelled	0.0	0.0	0.0	0.0	0.0
F&V	0.0	0.0	0.0	0.0	0.0
Citrus	0.0	0.0	0.0	0.0	0.0
Olives	0.0	0.0	0.0	0.0	0.0
Peanut	0.0	0.0	0.0	0.0	0.0
Potato	0.0	0.0	0.0	0.0	0.0
Pulses	0.0	0.0	0.0	0.0	0.0
Tropical Fruit	0.0	0.0	0.0	0.0	0.0
Other Crops	0.0	0.0	0.0	0.0	0.0
Other Crops	0.0	0.0	0.0	0.0	0.0
Row Crops	0.0	0.0	0.0	0.0	0.0
Cereals	0.0	0.0	0.0	0.0	0.0
Oilseed Rape	0.0	0.0	0.0	0.0	0.0
Rice	0.0	0.0	0.0	0.0	0.0
Sugar Beet	0.0	0.0	0.0	0.0	0.0
Sugarcane	0.0	0.0	0.0	0.0	0.0
Sugarcane	0.0	0.0	0.0	0.0	0.0
Sunflower	0.0	0.0	0.0	0.0	0.0
Grand Total	0.0	0.0	0.0	0.0	0.0



AgbioInsight



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BioMR Syndicate **open** 2024MY (delivery 2024-2025)

Countries

- + Repeat of previous markets +
- + India
- + Canada
- + Others (TBC)

AgbioInsight



Interactive Dashboard

Qualitative and quantitative data including grower sentiment



Expert Support

Access to AgbioInvestor's industry leading analyst support service





Granular Data in Excel Format

- ✓ Country-by-country data
- ✓ Base area
- ✓ Treated Area
- ✓ Volume Value
- ✓ Brand/Product Name
- ✓ Composition (AIs)
- ✓ Class (HIFO, biostimulant)
- ✓ Manufacturer/vendor
- ✓ Formulation type



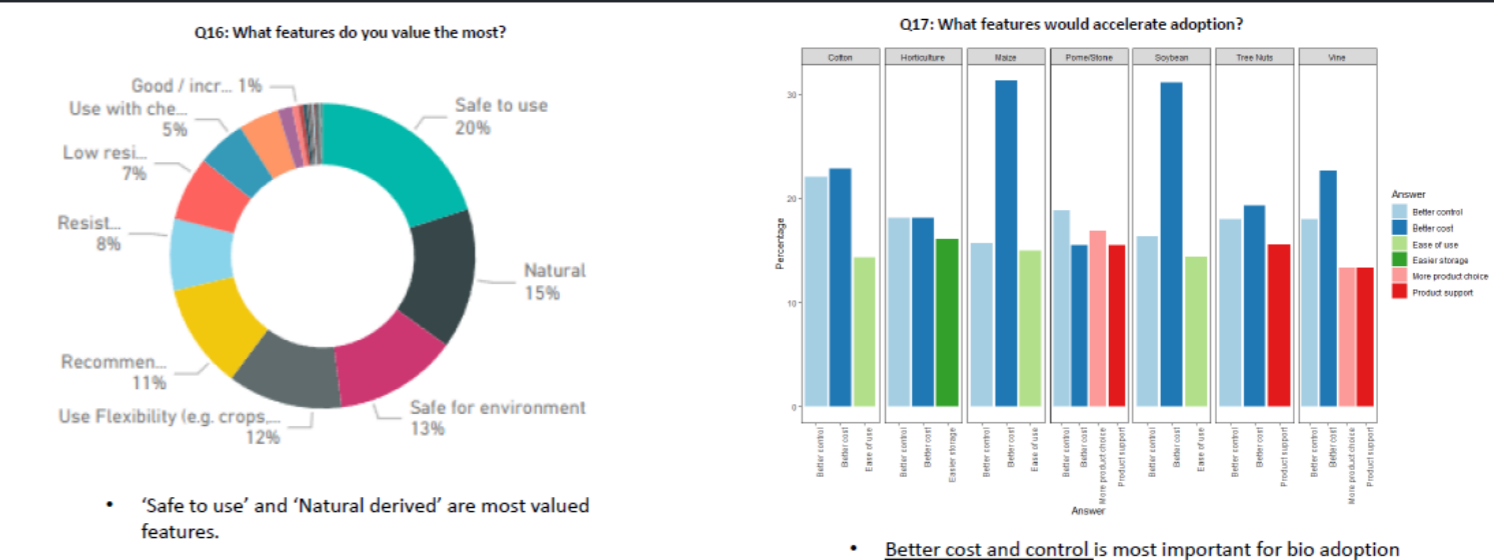
Curated Decks

Analyst curated PowerPoint Decks provide a quick yet powerful snapshot into key findings both quantitative and qualitative for the 9 surveyed markets

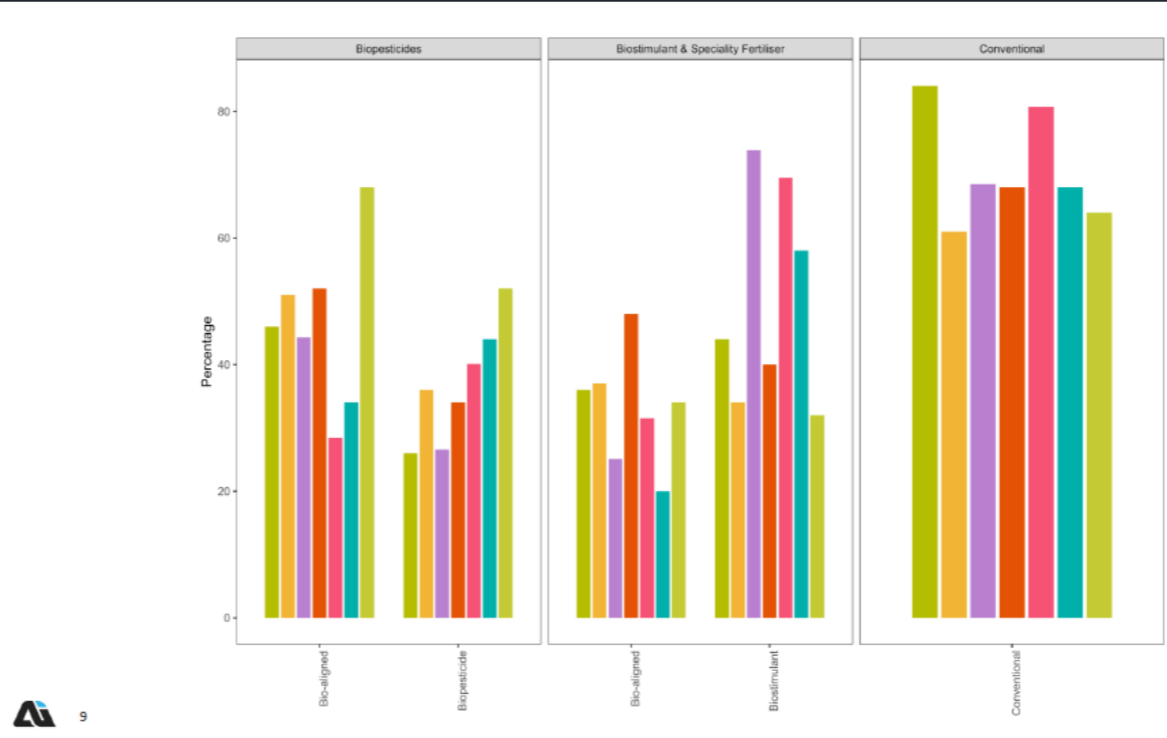
Presentation Outline

1. Definitions, caveats and other information
2. Descriptive Status
3. Market
4. Sentiment
5. Qualitative Findings

Key product features.



Percentage of Bio Growers Using Different Product Types



- **Better cost and control** is most important for bio adoption
- Pome/Stone, Tree Nuts and Vine require **better product support**
- **More product choices** important for fruit growers
- Grower with field crops value **ease of use**
- Horticulture requires **easier storage** for adoption

	A	B	C	D	E	F
1	Count	Survey Crop	Application Typ	Label Applicati	Product Cod	Value (\$ m
2	Spain	Vine	Foliar	Foliar	SPAINBCI00036	0
3	Brazil	Soybean	Foliar	Foliar	BRAZIL01064	0
4	USA	Vine	Foliar	Foliar	USA00226	0
5	Spain	Horticulture	Foliar	Foliar	SPAINBCI01039	0
6	USA	Maize	Foliar	Foliar	USA00747	0
7	Brazil	Soybean	Foliar	Foliar	BRAZIL00412	0
8	USA	Vine	Foliar	Foliar	USA00581	0
9	France	Vine	Foliar	Foliar	FRA00793	0
10	Spain	Olives	Foliar	Foliar	SPAINBCI00253	0
11	Brazil	Soybean	Soil	Foliar	BRAZIL01282	0
12	Brazil	Citrus	Foliar	Foliar	BRAZIL01080	0
13	Italy	Vine	Foliar	Foliar	ITA00312	0



Qualitative | Sentiment

Market | Raw Data

Crop Group, Individual Crop

All

Country, Region

All

Farming Practices

All

Age

18 | 87

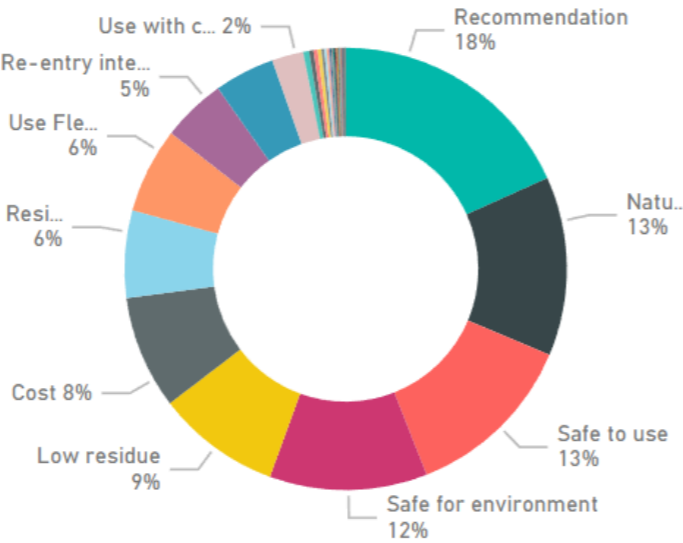
Usage, Type, Class

Search

Biopesticide

Biostimulant & Speciality Fertiliser

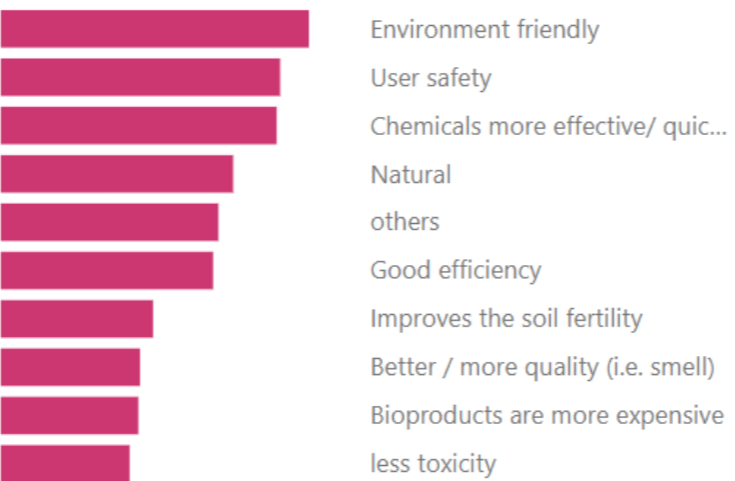
Q13: What made you decide to use bio?



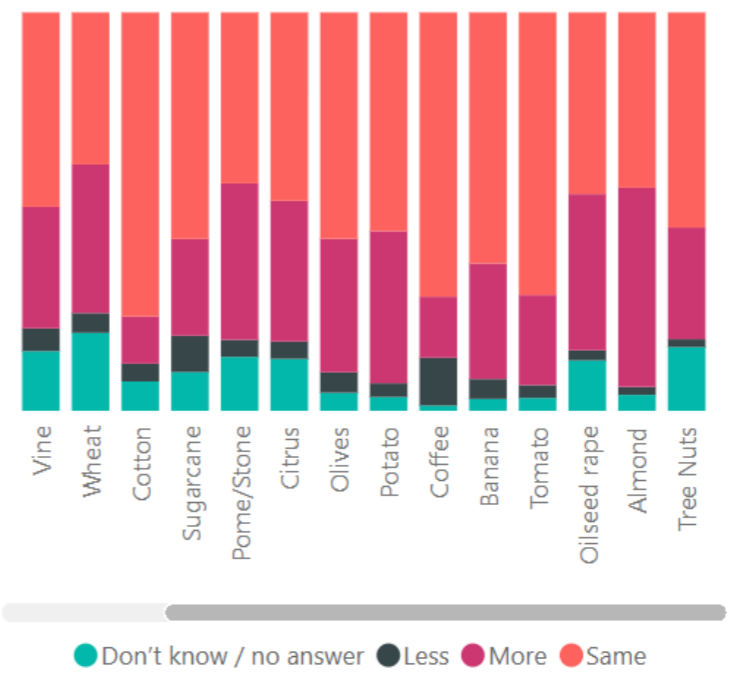
Q14: Is there a difference from using chemicals?



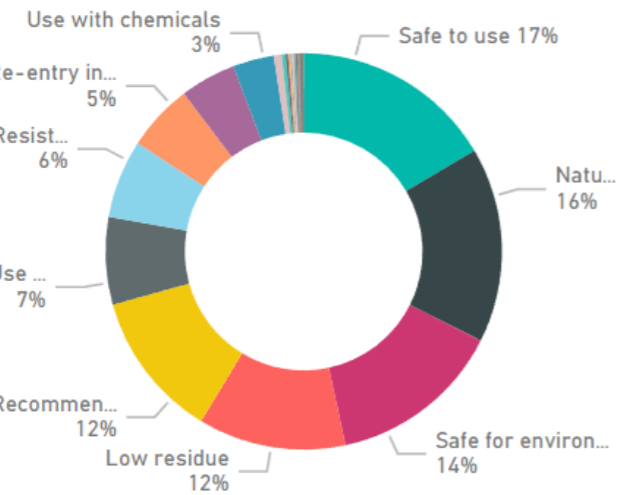
Q14a: In what way is it different?



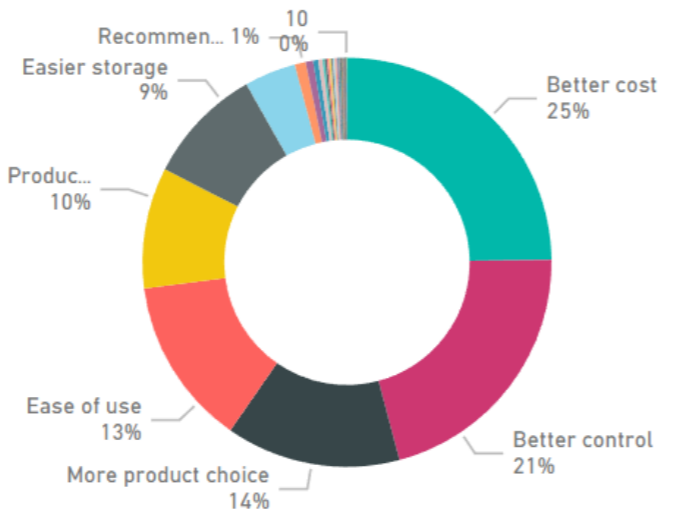
Q15: Do you intend to use bio more/less in future?



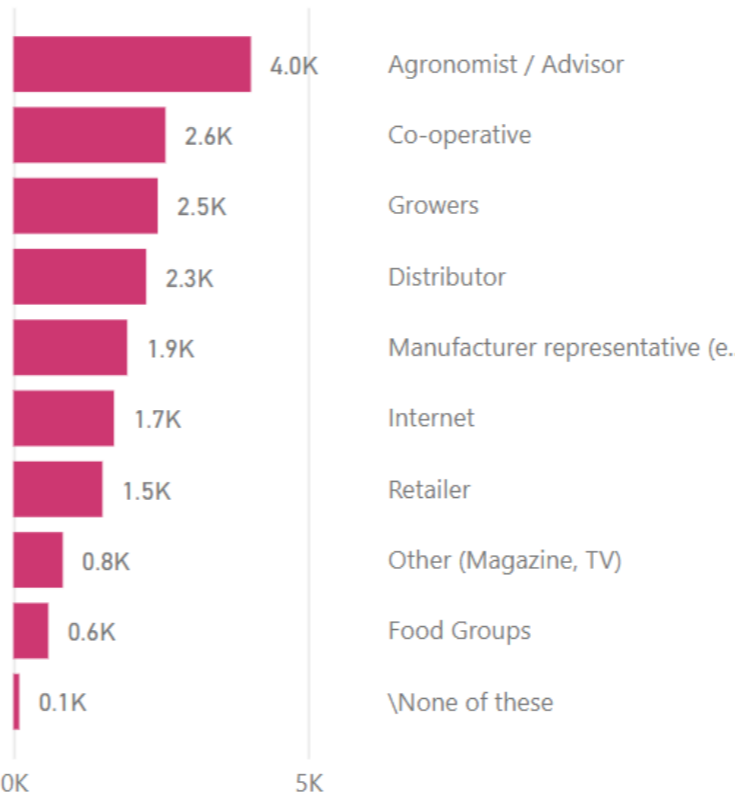
Q16: What features do you value the most?



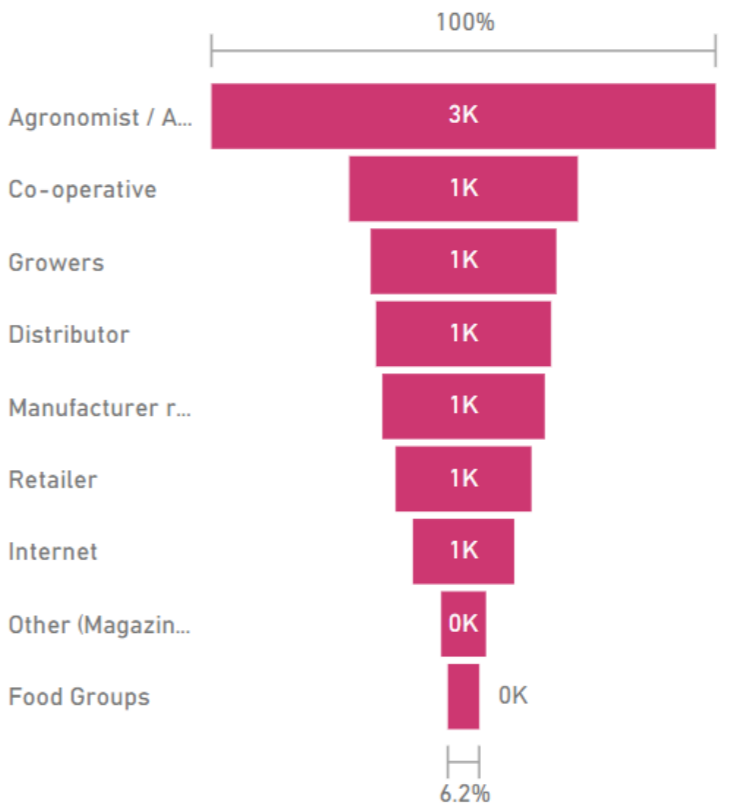
Q17: What features would accelerate adoption?



Q18: What are your sources of information for bio?



Q19: What sources influence your decision most?



Clear Selections

Disclaimer



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