AgbioInvestor

bioMR 2025

Biological Crop Input Use Survey

Europe - 2025

+ Sentiment Analysis + Valuable Trends & Insights + Cost Effective

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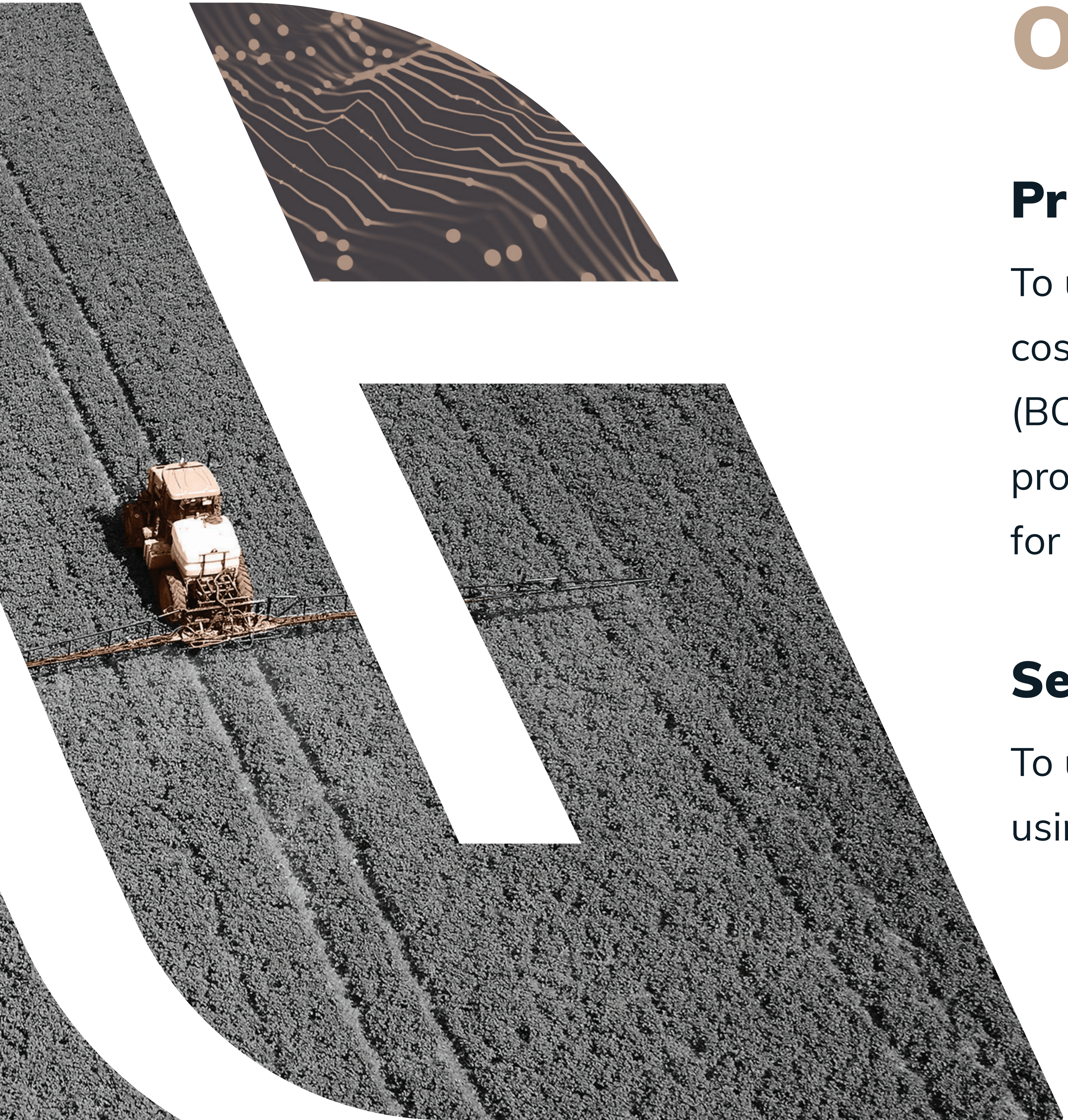
Analytical Market Research

As the agricultural industry changes, new market sectors are emerging, holding significant growth potential for companies positioned to exploit these opportunities.

AgbioInvestor MR's global market research provides unique insights into niche markets where disrupting technology is increasingly altering the agricultural landscape.

With a focus on timeliness and quality and with capabilities across all key crop-growing regions, AgbioInvestor MR leverages our industry expertise together with insightful and detailed information gained through market research to provide powerful insights into crop input usage across key high-value crop markets, enabling a greater understanding of market dynamics and grower product choice.



Objectives

Primary Aim

To understand grower usage (e.g. treated acres, costs, key brands etc.) of Biological Crop Inputs (BCI) in the key crop/country markets, with a view to providing a representative view of the total market for such products in the 2025 agricultural year.

Secondary Aim

To understand grower behaviours and experience of using BCI.

Approach and Study Design

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Country Coverage

- France, Italy, Spain and Turkey
- Key crops harvested in 2025

Target Groups / Screening

- Growers using Bio Crop Inputs
- CATI / F2F / Online interviews where appropriate

Questionnaire

- Quantitative questions to meet Primary Aim
- Qualitative questions to meet Secondary Aim

Farmer interview length expected to be max 25 minutes

Target Products and Definitions

Survey undertaken with Bio Growers – growers using **Biopesticides** or **Biostimulant** products:

Biopesticides & Associated Products

Biopesticides

+ Microbials (e.g. bacteria, fungi, yeast)
+ Macrobials (e.g. insect pest predators nematodes)
+ Natural Products (e.g. plant oils, plant extracts)
+ Basic substances (e.g. acetic acid, COS-OGA)
+ Pheromones (e.g. insect mating disruptants)

Bio-Aligned

+ Inorganics (e.g. copper, sulphur)
+ Fermentation Products (e.g. abamectin, spinosad)
+ Hybrids (e.g. chemistry + biological products)

Biostimulants & Speciality Fert.

Biostimulants

+ Seaweed extracts (e.g. Ascophyllum nodosum extract)
+ Amino acids (e.g. glycine betaine)
+ Plant hormones (e.g. cytokinin, gibberellins)
+ Humic acids (e.g. humic acid, fulvic acid)
+ Microbials (e.g. inoculants, micorhizzae)

Speciality Fert.

+ Chelated Micronutrients
+ Soil Conditioners
+ Pre-inoculants

Products for e.g. Stress Mitigation, Nutrient Use Efficiency, quality improvement etc. which are not just fertilisers.

All application types will be considered (e.g. seed treatment, foliar, soil), whilst bio users will also be asked for information on conventional products used in the program to understand position of bio products within hybrid programs.

Questionnaire

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Screening

Growers must:

- ✓ Be responsible, involved in choice or make decisions for Crop Inputs
- ✓ Have cultivated one of the target crops
- ✓ Have used any biological / natural pesticides or biostimulants in 2025

Quantitative Section

Aims to collect information on key quantitative measures:

- ✓ Crop Area cultivated
- ✓ Product/Brand used
- ✓ Treated Area
- ✓ No Applications & Application Rate
- ✓ Cost
- ✓ Reasoning for application (Open)
- ✓ Satisfaction (Scale 1-5) and satisfaction reasoning (set answers)

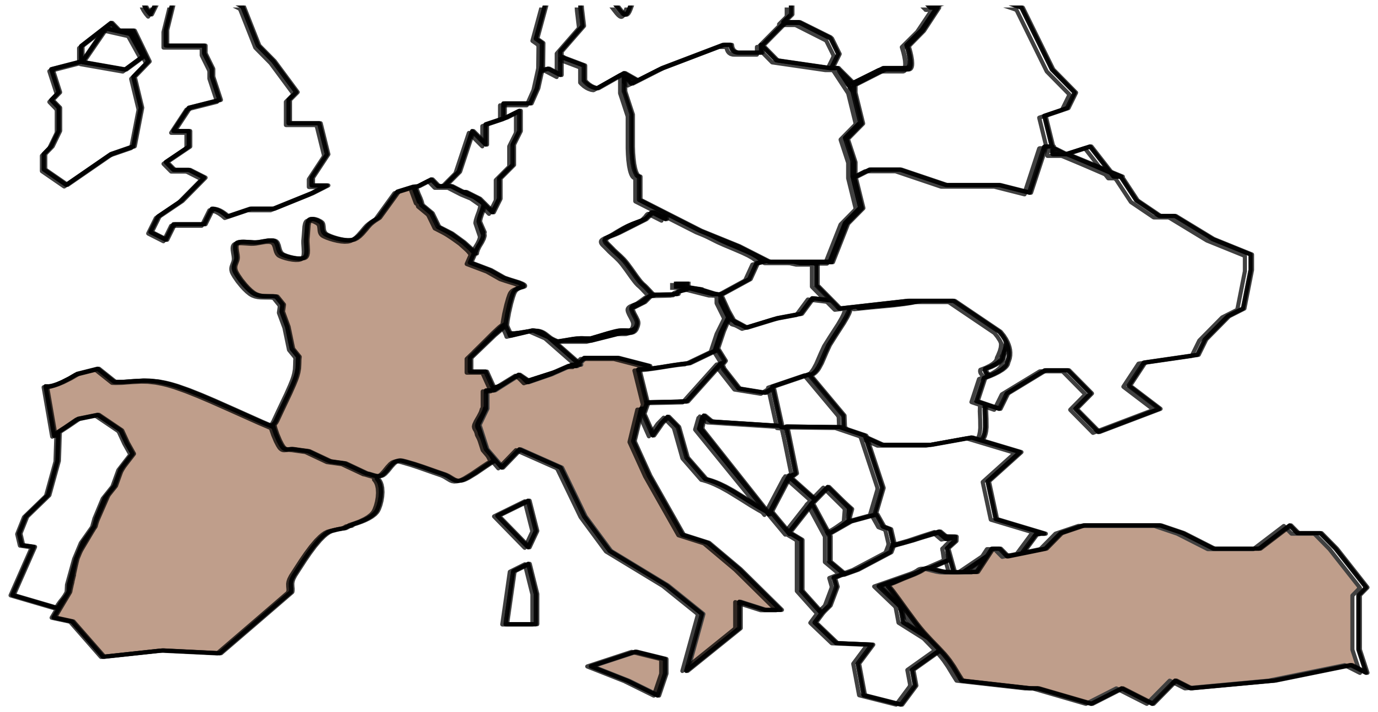
Qualitative Section

Series of short open questions about why growers used bio inputs, whether would use again, what characteristics valued most and where recommendations came from.

Crop/Country Matrix

Region	Almond	Citrus	Cotton	Horticulture	Maize	Oilseed Rape	Olives	Pome/Stone	Potato	Tomato	Tree Fruit/ Nuts	Vine	Wheat	Total
France					75	75					75	75	100	**400**
Italy		100		100	75		75	100		100		75	75	**700**
Spain	50	50		200	100		100	100	100			100	100	**900**
Turkey			100	150	50						150	50		**500**
Total	**50**	**150**	**100**	**450**	**300**	**75**	**175**	**200**	**100**	**100**	**225**	**300**	**275**	**2,500**

Note: No. surveys subject to finding number of bio users.



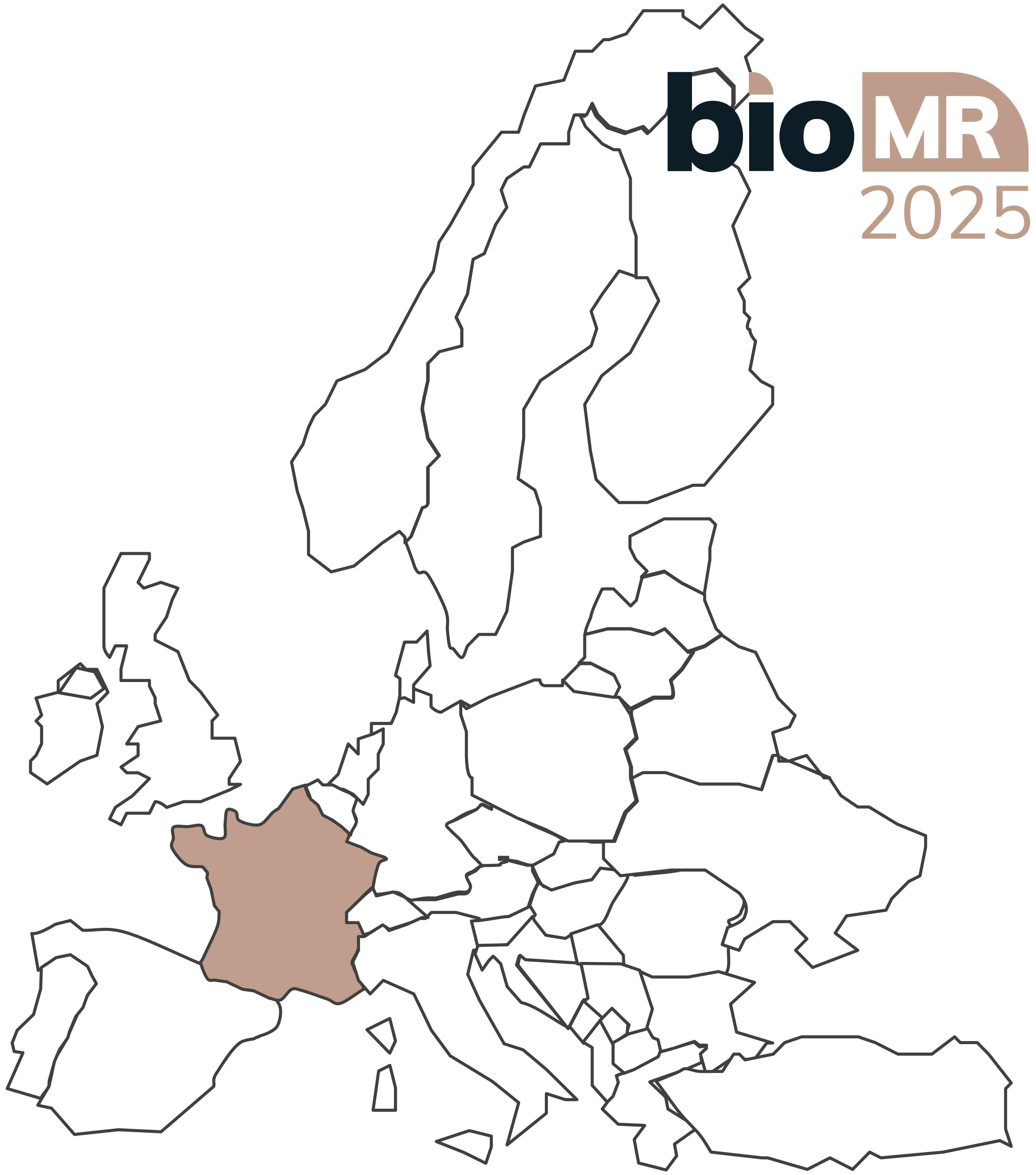
4 **4 Countries Surveyed**

13 **13 Key Crops**

Country: France

France is a leader in adoption of the macrobial Trichogramma for insect control in maize, whilst a number of bio options are positioned for control of key vine and pome / stone fruit pests. Biostimulants are expected to have grown substantially in recent years, with wheat and oilseed rape expected to be growth markets from a low historical base.

Crop Group	Crop	Cut-Off Size	No. Interviews
Field Crops	Maize	>15 Ha	100
Field Crops	Oilseed Rape	>10 Ha	150
F&V	Tree Fruit/Nuts	>2 Ha	100
F&V	Vine	>10 Ha	100
Field Crops	Wheat	>30 Ha	50



Sampling Plan
Sample Broken Down by Key State Acreages

Interview Type
CATI - Computer-assisted telephone interviewing

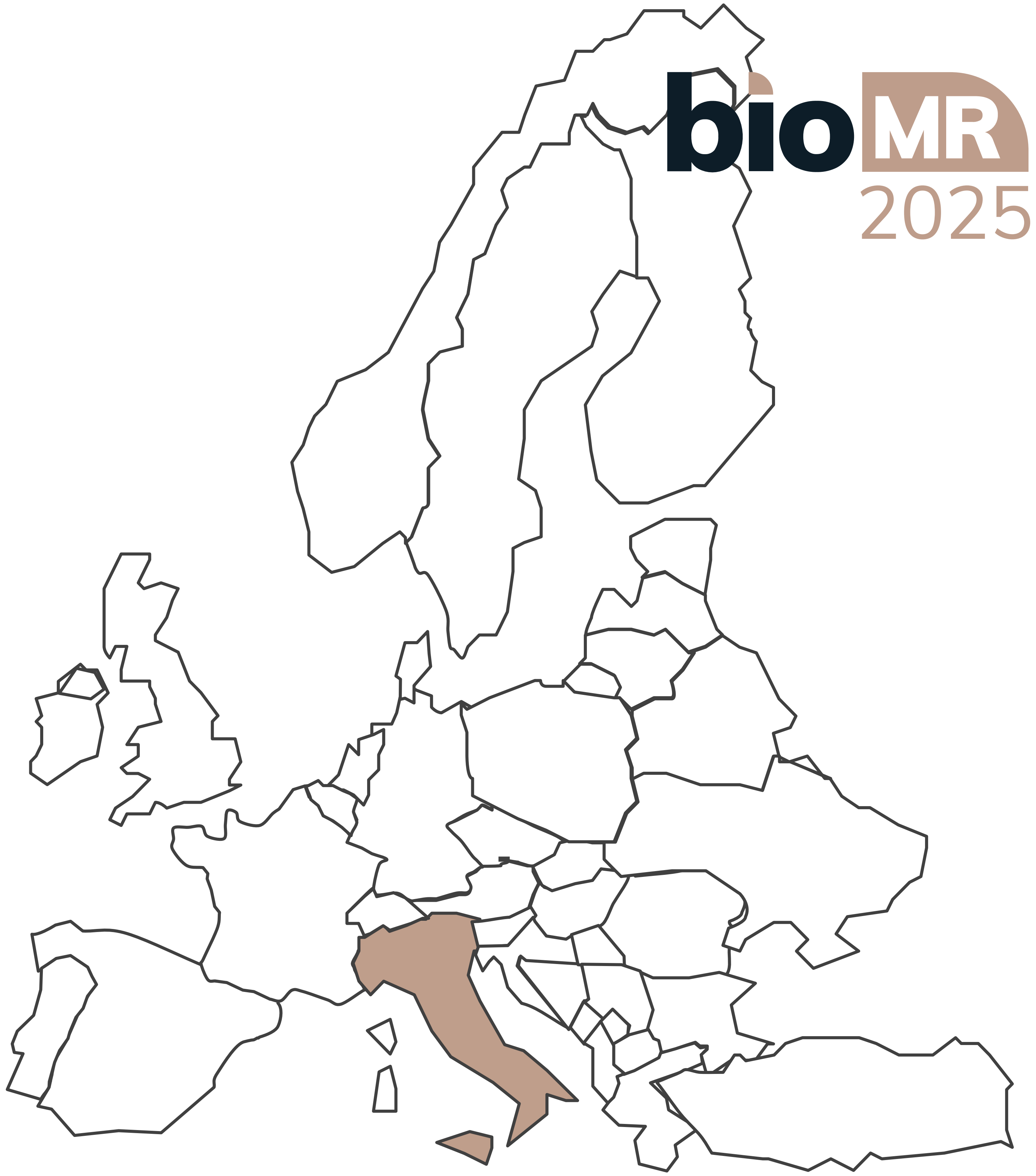
Agricultural Year
October To September

Start Month
September

Country: Italy

Italy is a leading specialty crop producer, with significant acres of tomato, vine, citrus, horticulture and olives. Biostimulants are expected to be of strong importance in Italy.

Crop Group	Crop	Cut-Off Size	No. Interviews
F&V	Citrus	>2 Ha	100
F&V	Horticulture	>2 Ha	100
Field Crops	Maize	>20 Ha	75
Plantations	Olives	>2 ha	75
F&V	Pome/Stone	>2 Ha	100
F&V	Tomato	>1 Ha	100
F&V	Vine	>5 Ha	75
Field Crops	Wheat	>20 Ha	75



Sampling Plan
Sample Broken Down by Key NUTS Region Acreages

Interview Type
CATI - Computer-assisted telephone interviewing

Agricultural Year
January To December

Start Month
September

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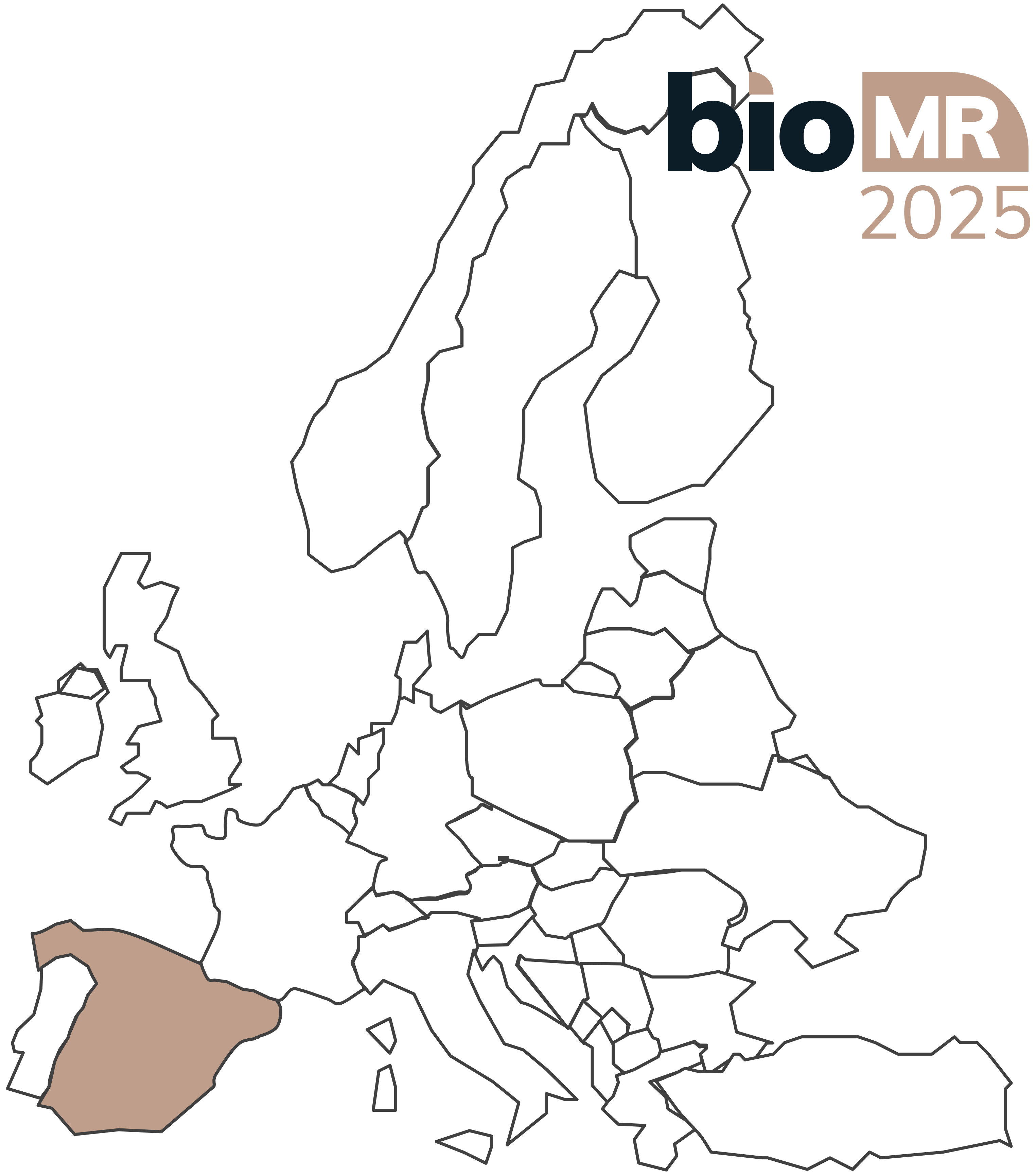
Country: Spain

Pilot studies in Spain have shown the importance of the country for biopesticides and biostimulants in a range of crops. Specialty crops are of key importance, whilst field crops like maize and wheat are expected to only have increased in importance for biostimulants.

Crop Group	Crop	Cut-Off Size	No. Interviews
F&V	Almond	>1 Ha	50
F&V	Citrus	>1 Ha	50
F&V	Horticulture	>1 Ha	200
Field Crops	Maize	>10 Ha	100
Plantations	Olives	>3 Ha	100
F&V	Pome/Stone	>1 Ha	100
Field Crops	Potato	>1 Ha	100
F&V	Vine	>3 Ha	100
Field Crops	Wheat	>15 Ha	100



Sampling Plan
Sample Broken Down by Key NUTS Region Acreages

Interview Type
CATI - Computer-assisted telephone interviewing

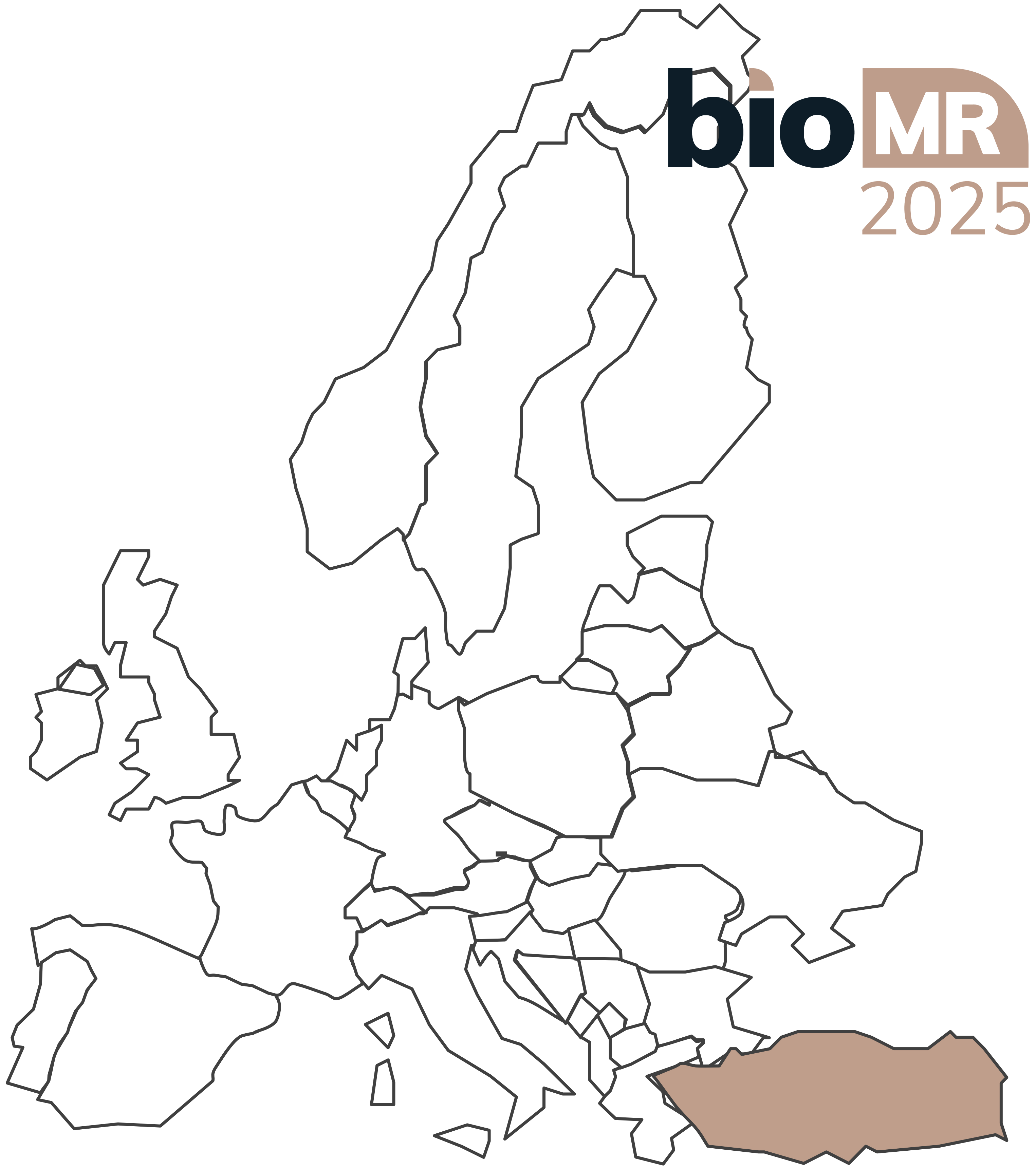
Agricultural Year
January To December

Start Month
September

Country: Turkey

Turkey cultivates a wide diversity of crops, however agriculture is in a less developed state than some of the key European markets. It is relatively unknown how important biostimulants and biopesticides are, with the survey expected to go some way towards addressing these unknowns.

Crop Group	Crop	Cut-Off Size	No. Interviews
Field Crops	Cotton	>5 Ha	100
F&V	Horticulture	>1 Ha	150
Field Crops	Maize	>2 Ha	50
F&V	Tree Fruit/Nuts	>1 Ha	150
F&V	Vine	>1 Ha	50



Sampling Plan
Sample Broken Down by Key NUTS Region Acreages

Interview Type
CATI - Computer-assisted telephone interviewing

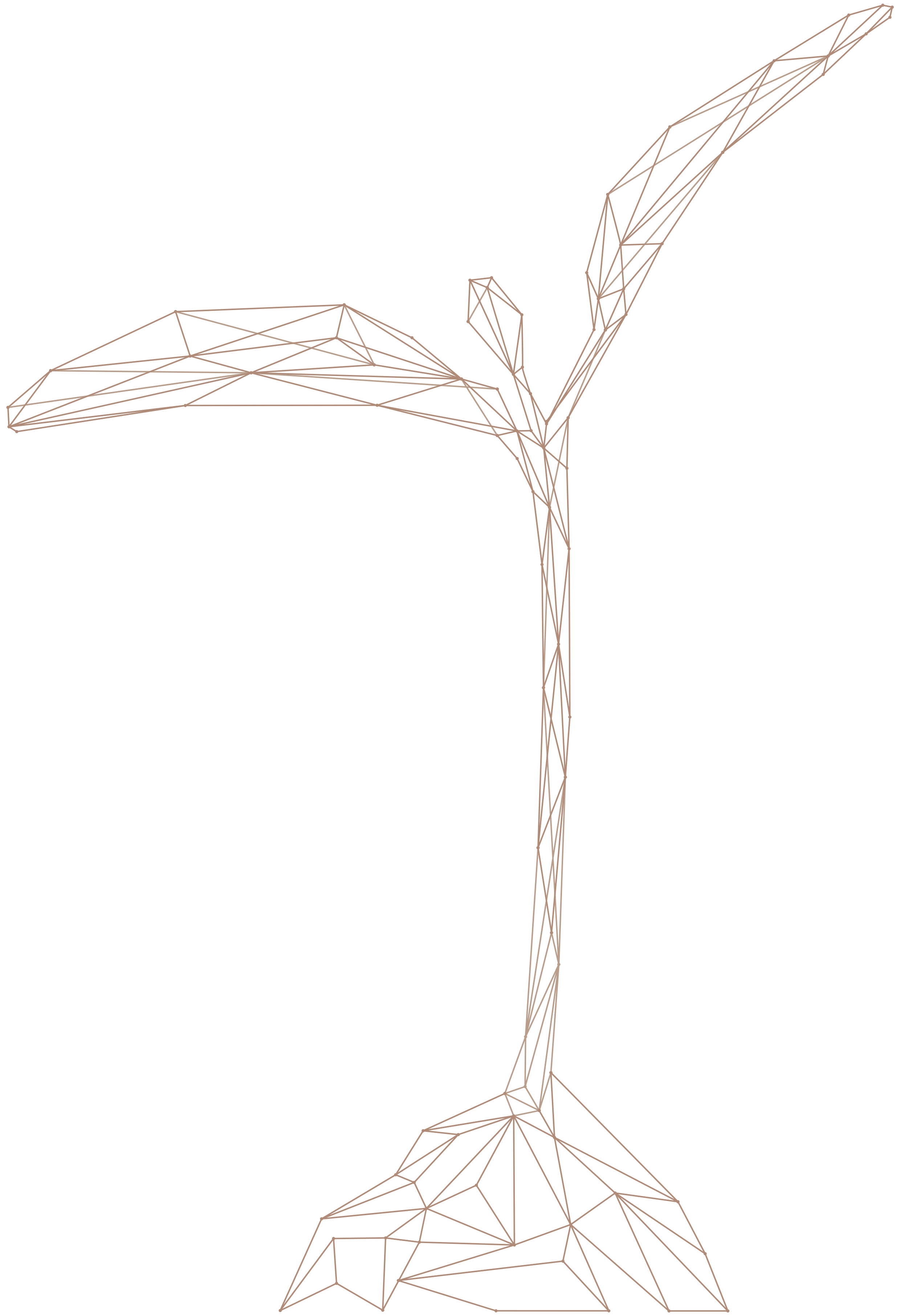
Agricultural Year
January To December

Start Month
Autumn

Study Caveats

Study depends upon surveying growers using bio products. The low % of growers using these products makes reaching these growers more difficult and increases the survey effort required. In some cases, there may be a re-prioritisation of survey effort between crops if not enough growers can be found to meet the allocated quota.

Seed Treatment product information is likely to depend upon the route of purchase – more grower information is likely with products treated on-farm than via the industry, as growers may not know what ST was applied to the bag. In these cases, assumptions may be made on the basis of Seed Company (e.g. Becks and MBI agreement).



Deliverables
Overview

Data

- Cleaned and extrapolated data for each country
- Raw data in cleaned and normalised form
- Sentiment analysis for qualitative questions

Reporting

- Executive summaries
- Slide deck with key findings
- Power BI dashboard for investigating data

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	A	B	C	
1	Countı	Survey Cro	Application Typ	Labe
2	Spain	Vine	Foliar	Foliar
3	Brazil	Soybean	Foliar	Foliar
4	USA	Vine	Foliar	Foliar
5	Spain	Horticulture	Foliar	Foliar
6	USA	Maize	Foliar	Foliar
7	Brazil	Soybean	Foliar	Foliar
8	USA	Vine	Foliar	Foliar
9	France	Vine	Foliar	Foliar
10	Spain	Olives	Foliar	Foliar
11	Brazil	Soybean	Soil	Foliar
12	Brazil	Citrus	Foliar	Foliar
13	Italy	Vine	Foliar	Foliar

Join the Biological Crop Input Use Survey

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Contact Sales

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