

Biopesticides Market Size & Share Analysis - Growth Trends and Forecast (2026 - 2031)

> **Industry:** Biologicals, Biopesticides & Crop Protection (Agriculture & Agribusiness)

> **Source:** <https://www.mordorintelligence.com/industry-reports/global-biopesticides-market-industry>

> **Scraped Date:** 2026-09-17

Executive Market Summary

Market Metric	Details
Base Market Size	USD 12.7 billion
Projected Forecast (2031)	USD 12.7 billion
Growth Rate (CAGR)	11.15 %
Largest Market Region	N/A
Fastest-Growing Region	N/A

Market Visualizations & Infographics

- [Major players in Biopesticides industry](images/chart_2.png)
- [Biopesticides Market (2026 - 2031)](images/chart_3.png)
- [Biopesticides Market: Market Share by Form](images/chart_4.png)
- [Biopesticides Market: Market Share by Crop Type](images/chart_5.png)
- [Biopesticides Market CAGR (%), Growth Rate by Region](images/chart_6.png)
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Comprehensive Research Analysis

Overview Points List Flex 49 Share Feature End

Market Overview

Study Period	2018 - 2031
Market Size (2026)	USD 7.46 Billion
Market Size (2031)	USD 12.65 Billion
Growth Rate (2026 - 2031)	11.15 %
Fastest Growing Market	North America
Largest Market	North America
Market Concentration	Low

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Market Overview

Biopesticides Market Analysis by Mordor Intelligence

The biopesticides market size is projected to grow from USD 6.72 billion in 2025 to USD 7.46 billion in 2026 and is forecast to reach USD 12.65 billion by 2031 at 11.15% CAGR over 2026-2031. Adoption in the biopesticides market is increasing as regulators impose restrictions on synthetic chemicals, organic farmland continues to grow, and contract fermentation platforms reduce production costs. North America leads in demand, supported by the United States Department of Agriculture's climate-smart funding initiatives and the Environmental Protection Agency's expedited approval processes. Row-crop growers are substituting biofungicides for triazoles that are facing resistance, while European neonicotinoid bans are shifting acreage toward bioinsecticides. Rising venture investment within the biopesticides market in artificial-intelligence-guided microbial discovery is compressing development timelines, and multinational agrochemical companies are acquiring biological portfolios to hedge against synthetic deregistrations. However, feedstock price volatility and shelf-life constraints continue to temper the near-term growth trajectory of the Biopesticides market.

Key Report Takeaways

- * By form, biofungicides led with 47.4% of the biopesticides market share in 2025, while bioinsecticides are forecast to expand at a 12.3% CAGR through 2031.
- * By crop type, row crops held 84.2% of the biopesticides market size in 2025 and are advancing at an 11.2% CAGR through 2031.
- * By geography, North America accounted for 40.0% of revenue in 2025 and is projected to grow at a 12.5% CAGR through 2031.
- * Market concentration is low, with the top five companies, Corteva Agriscience, Marrone Bio Innovations, Inc. (Bioceres Crop Solutions Corp.), Gujarat State Fertilizers and Chemicals Ltd. (GSFC), Valent BioSciences LLC (Sumitomo Chemical Company, Limited), and T. Stanes and Company Limited, collectively holding a smaller portion of the market share in 2025.

Key Market Trends

Global Biopesticides Market Trends and InsightsDrivers Impact Analysis*

Driver	I (~)	% Impact on CAGR Forecast	Geographic Relevance	Impact Timeline
Stricter Global Curbs on Synthetic Pesticides	I	+2.3%	Europe, and North America	Medium term (2-4 years)
Expansion of Organic Farming Acreage	I	+2.0%	Europe, North America, India, and China	Long term (≥ 4 years)
Rising Resistance to Conventional Chemistries	I	+1.8%	Asia-Pacific cotton and vegetable systems	Short term (≤ 2 years)
Government Biopesticide Incentives and Fast-Track Approvals	I	+1.6%	North America, European Union, China, India, and Brazil	Medium term (2-4 years)
Fermentation-as-a-service Platforms Cut Scale-Up Capital Expenditure	I	+1.4%	North America, Europe, and emerging Asia-Pacific	Medium term (2-4 years)
Artificial Intelligence Guided Microbial Discovery Accelerates Product Pipeline	I	+1.2%	North America, Europe, and select Asia-Pacific hubs	Long term (≥ 4 years)

Source: Mordor Intelligence |

Competitive Landscape

Competitive Landscape

Global revenue concentration remained low with the top five companies, Corteva Agriscience, Marrone Bio Innovations, Inc. (Bioceres Crop Solutions Corp.), Gujarat State Fertilizers and Chemicals Ltd. (GSFC), Valent BioSciences LLC (Sumitomo Chemical Company, Limited), and T. Stanes and Company Limited, collectively holding a smaller portion of the market share in 2025. Corteva Agriscience's January 2023 buyout of Stoller Group integrated biostimulants and microbial pesticides into a unified biologicals platform aligned with its seed and chemistry franchises.

Innovation niches remain open across the biopesticides industry. From 2024-2025, Koppert Biological Systems invested USD 54 million in a Dutch fermentation site to scale beneficial nematodes and microbial fungicides for greenhouse horticulture. Andermatt Group tailored *Metarhizium* formulations for alpine grasslands, demonstrating the potential for regional specialization. Contract capacity from Ginkgo Bioworks levels the playing field by allowing start-ups to scale without plant investments, intensifying price competition across the biopesticides market.

Strategic alliances focus on enhancing local manufacturing efficiency and accelerating regulatory approvals. Certis Biologicals utilized Mitsui's distribution network in Southeast Asia to address increased demand for rice and horticulture products driven by pyrethroid resistance. These alliances also aim to strengthen supply chain resilience and foster knowledge sharing between partners, enabling better adaptation to market dynamics. As product portfolios expand and regulatory frameworks become more standardized across the biopesticides industry, brand differentiation will depend on factors such as strain exclusivity, formulation stability, and digital agronomy services that improve application timing, collectively influencing competition within the biopesticides market.

Biopesticides Industry Leaders* Corteva Agriscience

* Marrone Bio Innovations, Inc. (Bioceres Crop Solutions Corp.)

* Gujarat State Fertilizers and Chemicals Ltd. (GSFC)

* Valent BioSciences LLC (Sumitomo Chemical Company, Limited)

* T. Stanes and Company Limited

* *Disclaimer: Major Players sorted in no particular order

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Component Component 3 Scope Of The Report Bottom

Global Biopesticides Market Report ScopeBiopesticides are pest management agents derived from natural sources, including microorganisms such as bacteria, fungi, and viruses. Unlike synthetic chemicals, they are typically biodegradable, target-specific, and pose minimal risks to non-target organisms and humans. These characteristics make biopesticides integral to sustainable agriculture and integrated pest management (IPM) practices. The Biopesticides Market Report is Segmented by Form (Biofungicides, Bioherbicides, Bioinsecticides, and More), by Crop Type (Cash Crops, Horticultural Crops, and Row Crops), and by Geography (North America, Europe, Asia-Pacific, South America, the Middle East, and Africa). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons).

By FormBiofungicides |
Bioherbicides |
Bioinsecticides |
Other Biopesticides |

Segmentation Accordion Item

By GeographyNorth America | Canada |

| Mexico |

| United States |

| Rest of North America |

Europe | France |

| Germany |

| Italy |

| Netherlands |

| Russia |

| Spain |

| United Kingdom |

| Rest of Europe |

Asia-Pacific | Australia |

| China |

| India |

| Indonesia |

| Japan |

| Philippines |

| Thailand |

| Vietnam |

| Rest of Asia-Pacific |

South America | Argentina |

| Brazil |

| Rest of South America |

Middle East | Iran |

| Turkey |

| Saudi Arabia |

| Rest of Middle East |

Africa | Egypt |

| Nigeria |

| South Africa |

| Rest of Africa |

Frequently Asked Questions

How large will the biopesticides market be by 2031?

It is projected to reach USD 12.7 billion by 2031, expanding at 11.1% compound growth from 2026.

Which form segment leads revenue today?

Biofungicides command the highest revenue, holding 47.4% of global 2025 sales.

Why are bioinsecticides growing faster than other segments?

Neonicotinoid bans and rising lepidopteran resistance are driving a 12.3% compound rate for bioinsecticides through 2031.

Which region holds the largest biopesticides market share?

North America leads with a 40.0% revenue share in 2025, supported by federal incentives and expedited registrations.

What is the main cost challenge for biopesticide producers?

Volatile feedstock prices, especially molasses and corn steep liquor, erode margins for firms without long-term supply contracts.