



Biocontrol and International Aspects

DG Agri CDG IAA, 9 October 2024





Vision

Biology first to meet the needs of a sustainable world.



Mission

IBMA is the experienced voice of biocontrol for a sustainable and resilient global agriculture for healthier food systems to benefit farmers, environment and consumers.

Working with nature, our members are leading the way in innovative and effective biocontrol for agriculture, forestry, amenity, and public health.

International Biocontrol Manufacturers Association

Part of the Federation of Biocontrol industries Bioprotection Global



Biocontrol Association

Local associations around Europe – members represent us where no local Association



SMEs dominate

77% SMEs – 25% micro-SMEs



Global with European Focus

142 member companies in Europe
Global members learn how to access Europe. 70 more members worldwide

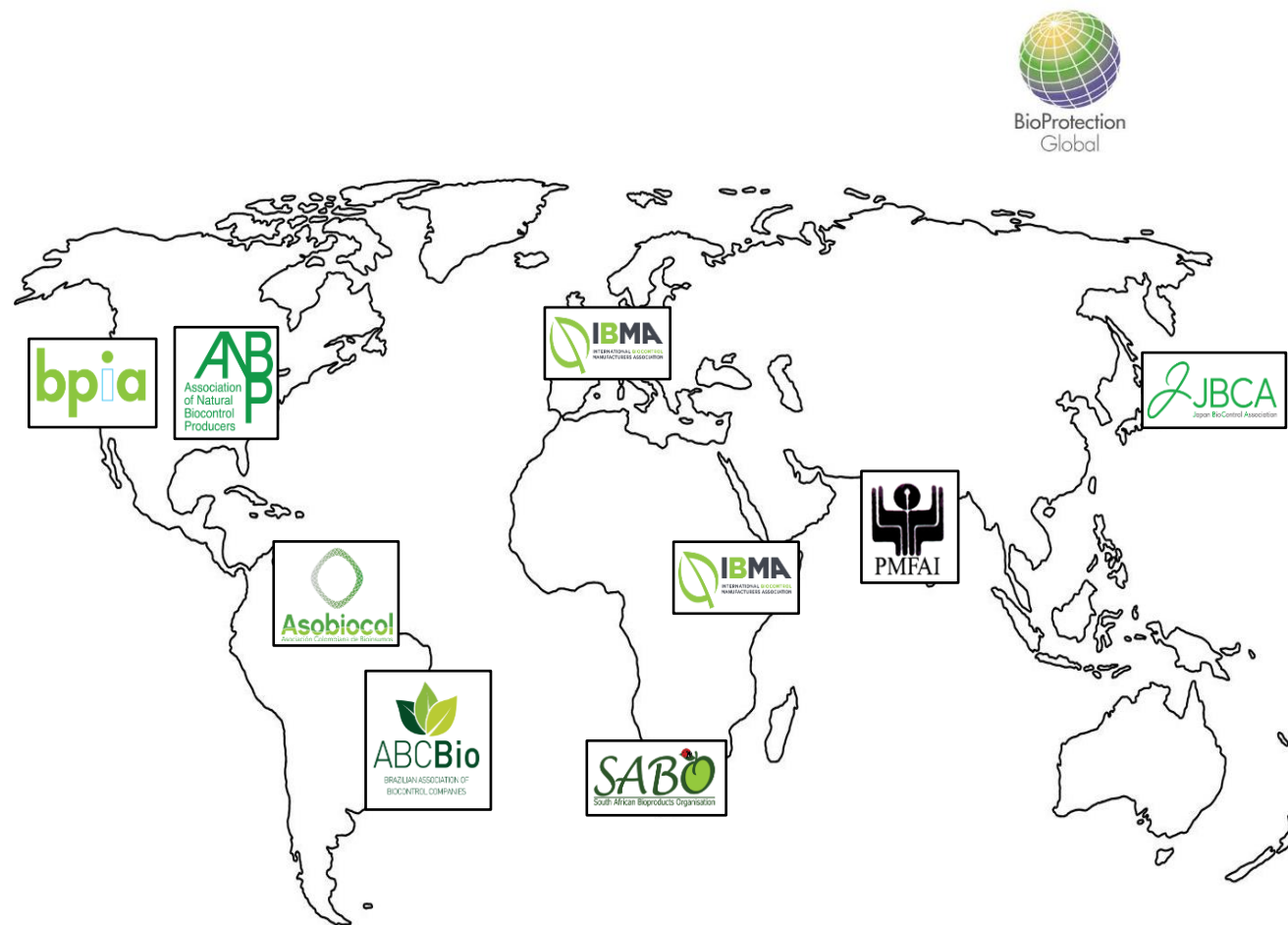


Established in 1995



Global reach

Part of Bioprotection Global IBMA
Kenya and 33% of members from outside Europe
Annual Biocontrol Industry Meeting
EU COM present



Biocontrol Definition

Examples of successful implementation of Biocontrol



Invertebrates



Microbials



Semiochemicals



Natural substances



MARKET VALUE AND GREEN INDUSTRY JOBS

The European Biocontrol Market is valued at more than 1.6 Billion Euros

- The size of the European Biocontrol Market has doubled since 2016, and grew by 20% between 2019 and 2022
- Biocontrol now accounts for about 10% of the total European Crop Protection Market
- The European Biocontrol Market is growing at a CAGR of nearly 10%, compared to the 2-4% growth rate in conventional crop protection
- The European Biocontrol Market provides more than 6500 green industry jobs

SMALL AND MEDIUM-SIZED ENTERPRISES (SMEs)

SMEs are the driving force in biocontrol

- Growth in the European Biocontrol Market is being driven by SMEs
- SMEs account for 36.5% of total European Biocontrol market, with a sales volume of 584.4 Million Euros
- SMEs command a 70.7% share of the combined Microbials, Semiochemicals, and Invertebrates

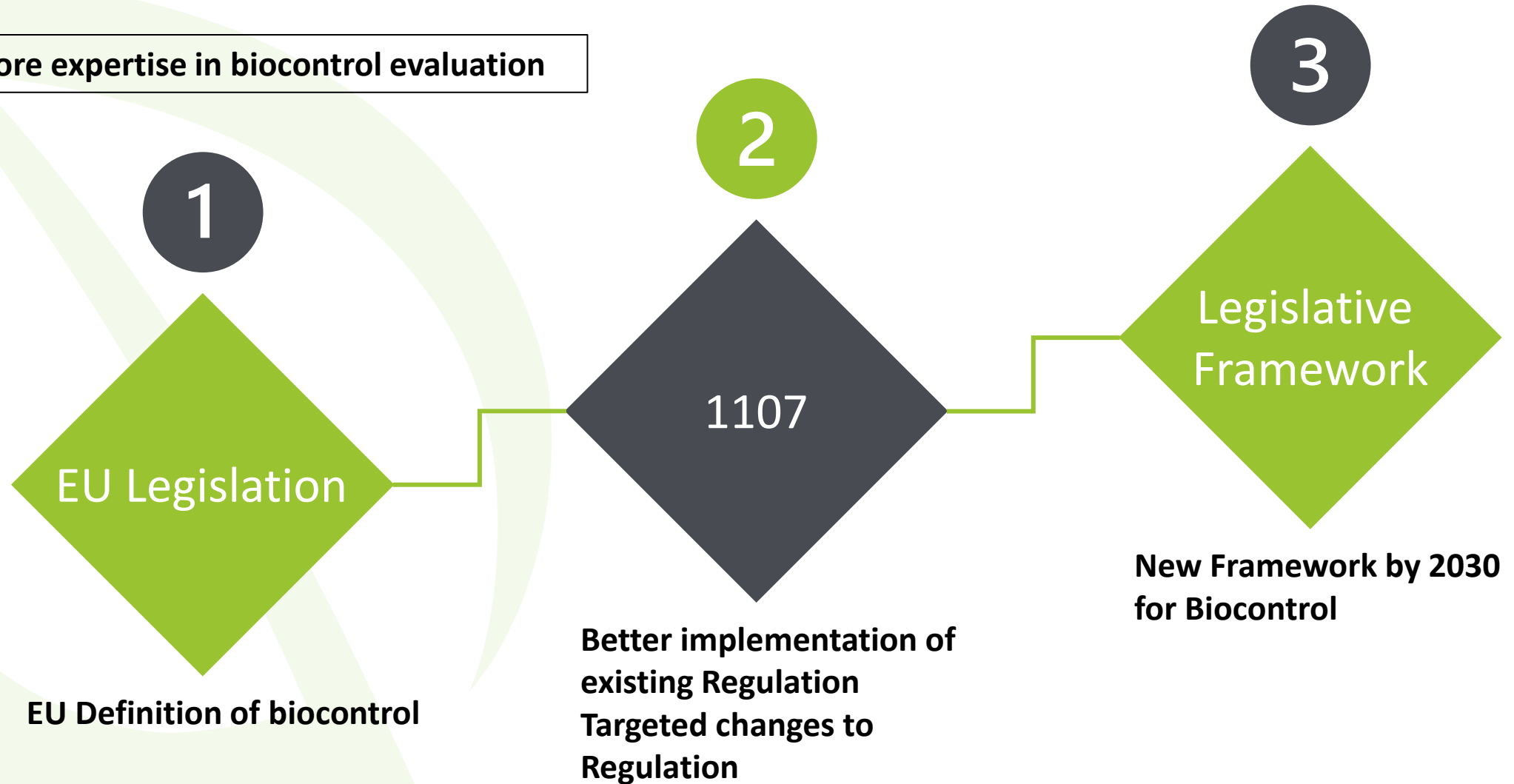
BIOCONTROL CATEGORIES GROWTH

All four biocontrol categories (Microbials, Natural Substances, Semiochemicals, Invertebrates) have grown since 2019

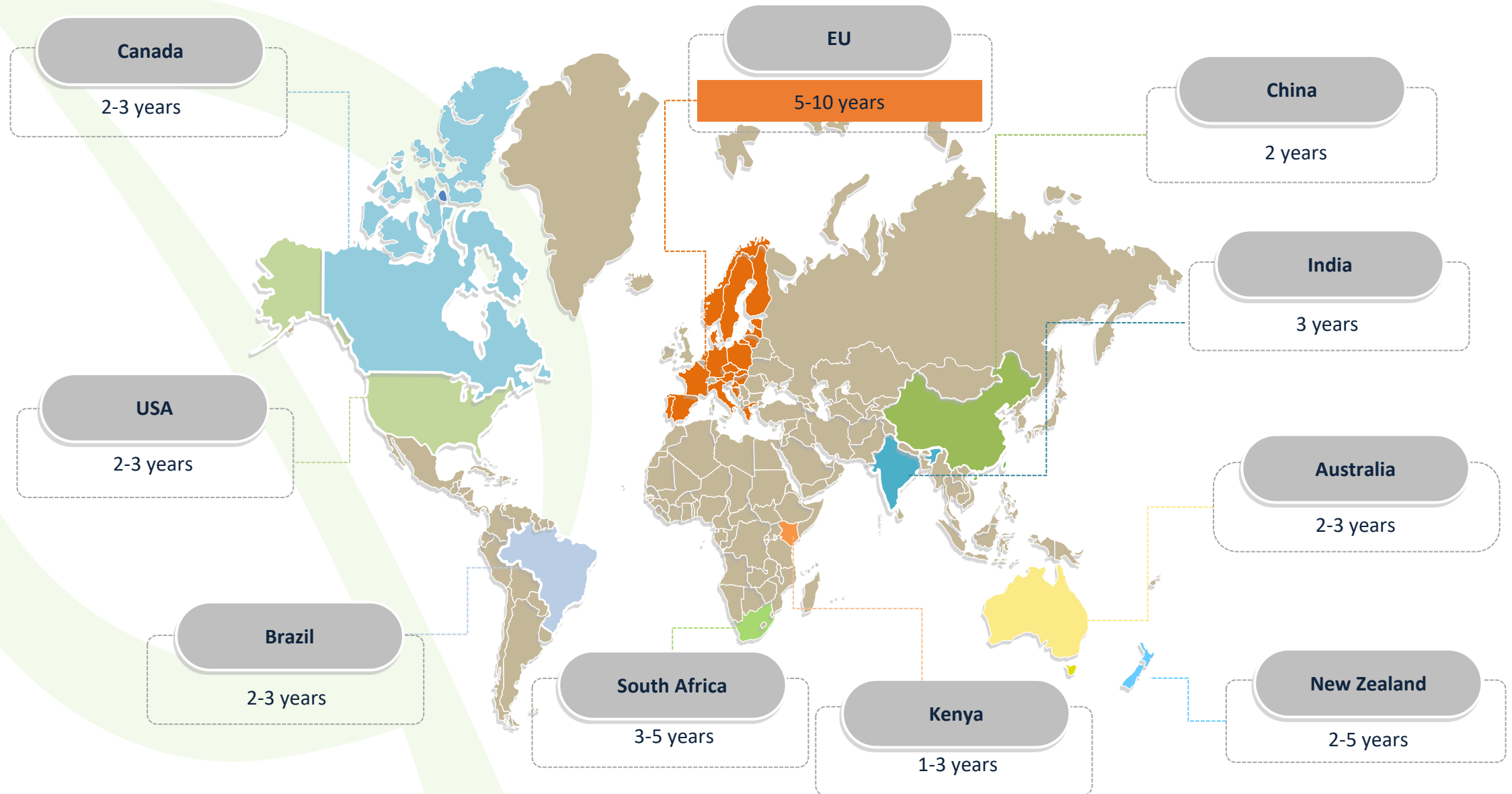
- Invertebrates are the fastest growing category, with 65% increase in sales volume vs. 2019
- The Natural Substances category has grown the most in terms of absolute value, increasing by 168.3 Million Euros since 2019

Three steps to speeding up authorisation

.....And more expertise in biocontrol evaluation



Faster biocontrol authorisation is needed in EU

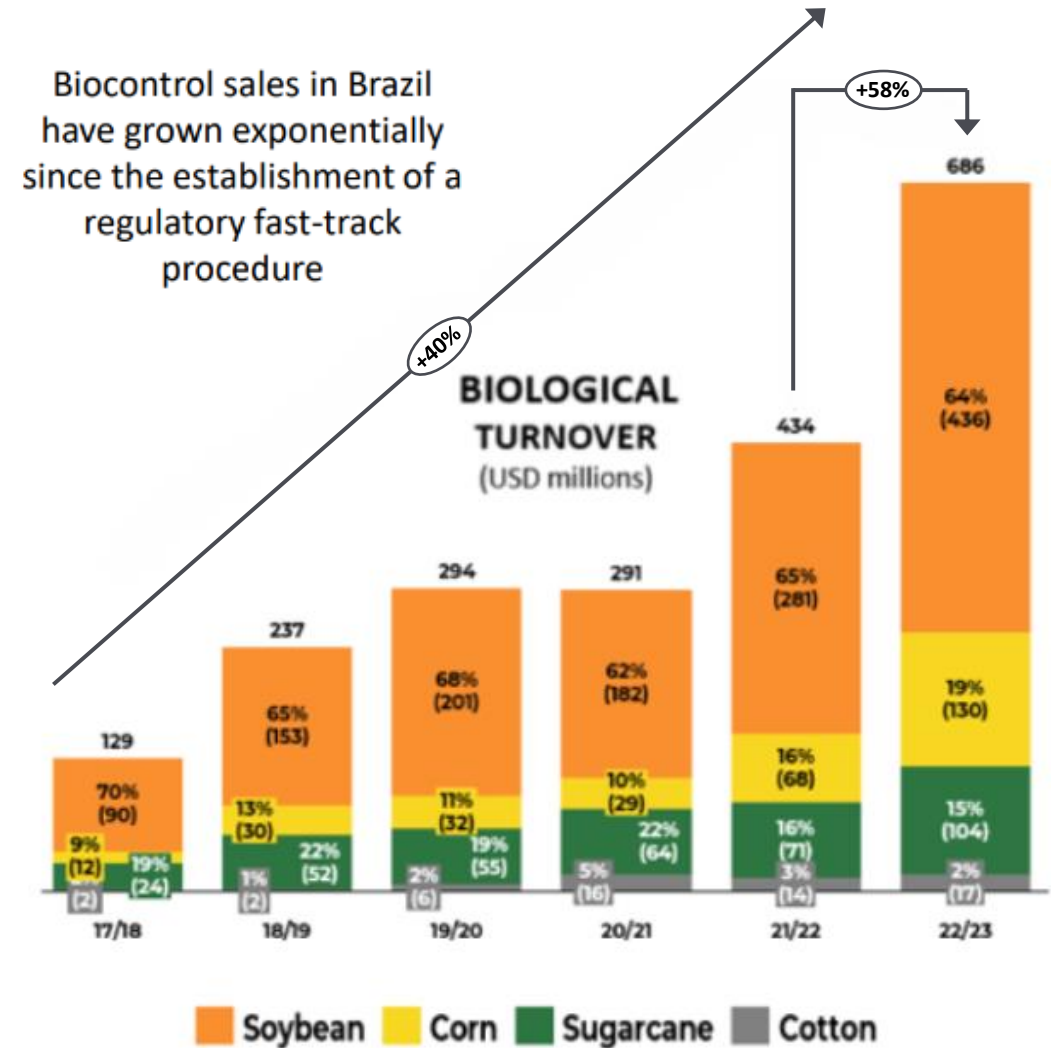


Brazil – A biocontrol powerhouse

Brazil is a biocontrol powerhouse. In the last 2 years, around an additional 100 biological products registered which continues to grow annually.

Brazilian authorities responded to farmer demand for biocontrol by prioritizing it in the authorization process.

- **Raise awareness of biocontrol.** In Brazil, 90% of farmers know about biocontrol whereas in the US, 86% of farmers don't know about it.
- **Provide training on how to assess biocontrol.**
- **Help farmers use biocontrol.**
 - Make biocontrol available, invite farmers to demonstrations, show them how it works. Farmers will then make their own choices. In Brazil this choice is for biocontrol.



The EU introduced the organic regulation (EU) 2018/848 in January 2021:

- New regime of compliance rather than equivalence
 - Uses of PPPs in third countries (including microorganisms, viruses and plant extracts) must align with EU approvals and conditions of use, at the latest by 1st January 2025.
- The new organic regulation will therefore require to be authorised as *“Products and substances authorised for use in organic production in certain areas of third countries”* as per Annex VI of regulation 2021/1165.
- This means that for every product and substance in this case, an application should be submitted to the EGTOP (Expert Group for Technical advice on Organic Production) by a control body, using a specific application template provided by the European Commission.

Annex VI Challenges and successful dialogue

- Expected limited capacities of the EGTOP to examine Annex VI dossiers based on IBMA impact assessment
- To ensure that organic products grown using biocontrol products exclusively authorized in third countries can be readily imported after the end of the transition period on 31 December 2024.
- Annex VI aimed at ensuring fairness and preventing trade disruption
- We need to ensure together workable solutions for farmers to continue to sell products which are not grown in Europe
- Avoiding any trade disruption for the EU food-chain



Thank you

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