

The French market of Biocontrol

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I – The volume of the Biocontrol market

II – What slows the development ?

III – Why French market will increase ?

I – The volume of the market

The volume of the market

We use the following data

- In 2001, biocontrol products represented 1% of the world market of plant protection.
- In 2007, biocontrol products represented 2% of the world market of plant protection.
- **Growth rate of the market is high (15% per year) but the market is still very low.**

II – What slows the development ?

What slows the development ?

Only few biocontrol products are allowed on the market

- The main bridling factor for the use of biocontrol products in France is.
The very low **number of biocontrol products present on the market.**

	IBCA Invertebrates	Micro-organisms	Semiochemicals	Natural Biochemical products
Number of active substances	61	11 (including 4 B. t.)	6	4

What slows the development ?

Only few biocontrol products are allowed on the market

➤ **The main reasons of the lack of biocontrol products are :**

- Historical reasons:

In the 70s, there were not enough industrial companies to develop biocontrol products from the works of research Institutes:

- **Chemical companies were not interested.**
- **Young start up companies had not enough money to develop an industrial product, register and distribute it.**

For example, the strain of *Trichoderma* present in Esquive was isolated by INRA 30 years ago.

- Regulative reasons:

At the beginning, the registration of biocontrol products was rather simple. But, as for chemical pesticides, the registration procedures became more and more difficult and expensive.

In the table, it's clear that there are more IBCA relatively to MBCA, semiochemicals or natural products because they don't need any registration.

What slows the development ?

Biocontrol products present on the market are not used as much as they could be

**Potential market of biocontrol products allowed in France
(without *Bacillus thuringiensis*)**

Cultures	ha substitutable	Pesticides substituted
Corn	5 800 000	Fungicides
Oilseeds	800 000	Fungicides
Mays	500 000	Insecticides
Vineyard	3 050 000	Fungicides + Insecticides
Orchard	75 000	Fungicides + Insecticides
Market gardening	12 000	Fungicides + Insecticides
Total	10 237 000 ha	

IBMA France

Potential market of biocontrol products allowed in France represents about 15% of the total market of plant protection.

What slows the development ?

Biocontrol products present on the market are not used as much as they could be

The main reasons are:

- **Even if scientists were generally at birth of each biocontrol product, major part of searchers and official prescribers didn't really trust the efficacy of biocontrol products.**
- **Distributors didn't feel biocontrol as a real market opportunity**

III – Why French market will increase ?

Why French market will increase ?

“Grenelle de l’environnement” create a shock

- A reflexion occurred in France from August 2007 to May 2008, to propose practical measures to protect environment: “Grenelle de l’environnement”. On that occasion, farmers had to face the public opinion about their use of GMO, pesticides, fertilizers, ...
- **Ecophyto 2018** is a plan adopted by the government to reduce the use of pesticides in agriculture: - 50 % pesticides from 2008 to 2018.
- In the west of France, in 2008, **a cooperative carried out a survey among their farmers**. The results were the following:
 - 46% think that the reduction of 50% is possible
 - 44% think that the reduction of 50% will be difficult
 - 2% think that this reduction is impossible
- **84% wish alternative solutions to avoid the use of pesticides.**

Why French market will increase ?

Consequences of Grenelle de l'environnement

- **Distributors are also changing and considering Biocontrol as a real market**, but our products are generally used only when it's difficult to use pesticides (no product registered, problem of resistance, residues, ..)
- Even if registration remains difficult in France, **Ministry of agriculture and AFSSA try to help the arrival of biocontrol products on the market:**
 - Delay for the registration of biocontrol products is shorter,
 - Costs of registration are reduced,
 - A “memorandum” to propose modifications of the directive CE 91/414 for biocontrol products, using REBECA conclusions, is prepared
 - A working group was created to establish new efficacy protocols for biocontrol products.

Conclusion

- **There is for us an opportunity to develop the market of biocontrol products.**
- **We have to propose real alternative to pesticides with good efficacy.**
- **We have the responsibility of our market**