

# BIOINPUTS IN BRAZIL

## Industry Market Data

Blink/CropLife Brazil Research

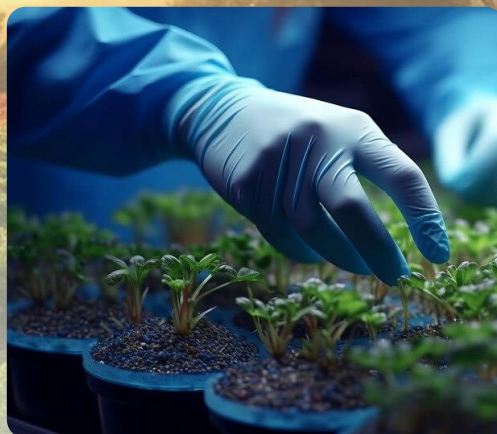




## AREAS OF ACTIVITY



**GERMPLASM**



**PLANT  
BIOTECHNOLOGY**



**CHEMICAL CROP  
PROTECTION  
PRODUCTS**



**BIOINPUTS**

# Digital Agriculture

CropLife Brazil was born from the recognition that agricultural systems require much more than just the benefits of individual technologies.

## RESEARCH & DEVELOPMENT



The 23 member companies of the Chamber of Bioinputs  
account for **80%** of the R&D market.



## GLOBAL MARKET

# US\$ 13 and 15 billion in 2023

(including all segments: control, inoculants, biostimulants and solubilizers)

**Expected Global annual growth until 2032  
from 13% to 14%**

Amount equivalent to **US\$ 45 billion**

**Three times larger than the current value**

Source: Blink/CropLife Brazil

A background image showing a person's hand holding a white smartphone over a field of green plants. The person is wearing a blue shirt and a plaid shirt. The field is filled with green leaves, and the background is slightly blurred.

## GLOBAL MARKET

**MOST REPRESENTATIVE  
SEGMENT:**

**BIOLOGICAL  
CONTROL  
PRODUCTS  
(57%)**

**Expected to continue holding  
the largest market share.**

Source: Blink/CropLife Brazil



## GLOBAL MARKET

### PROJECTED GROWTH:

**US and Europe are expected to increase the adoption of bioinputs in large-scale crops.**

### BRAZIL IS AN EXAMPLE:

**One of the highest rates of biological products utilization worldwide.**

Source: Blink/CropLife Brazil

## BRAZILIAN MARKET

**15%** growth in the  
**2023/2024 harvest**

(including all segments: control,  
inoculants, biostimulants and solubilizers)

Sales of  
**R\$ 5 billion**

considering the final price  
for the farmer

Source: Blink/CropLife Brazil

## BRAZILIAN MARKET

**Average annual  
growth rate over the  
past 3 years:**

**21%**

**4X**

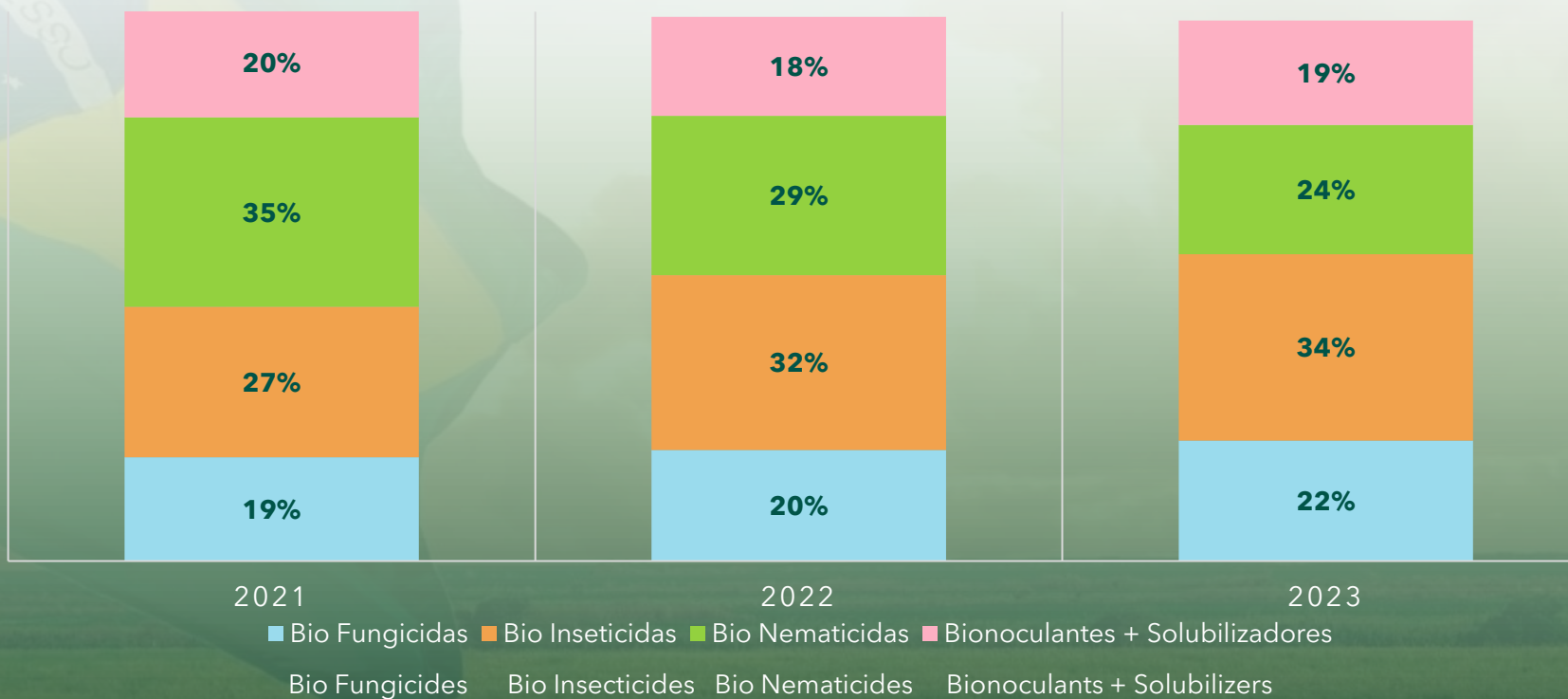
**above the  
global average**

Source: Blink/CropLife Brazil



# BRAZILIAN MARKET

## REPRESENTATIVENESS OF SEGMENTS (%)



Source: Blink/CropLife Brazil

## TREATED AREA

**Crop protection (chemical + biological products) grew by 15% in the 2022/2023 harvest**

**The adoption of bioinputs grew above 35% in the same area**

**Total share in the 2022/2023 harvest: 12%**

Source: Blink/CropLife Brazil



## USE OF BIOINPUTS BY CROP IN BRAZIL



**55%**  
Soy



**27%**  
Corn



**12%**  
Sugar  
cane



**6%**  
Cotton, coffee, citrus  
and FV

Source: Blink/CropLife Brazil

## REGIONAL DISTRIBUTION

### Increased use of agricultural bioinputs

**Mato Grosso**  
33%

**Goiás/DF**  
13%

**São Paulo**  
9%

**Paraná**  
8%

**Mato Grosso do Sul**  
8%

**Minas  
Gerais**  
8%

**Rio Grande  
do Sul**  
5%

**Bahia**  
5%

**Tocantins**  
3%

**Maranhão**  
3%

**Other  
states**  
6%

Source: Blink/CropLife Brazil



## AVERAGE ADOPTION RATE (AREA)

**Average rate rose from**  
**22% to 23%**

(including all segments: control, inoculants,  
biostimulants and solubilizers)

Source: Blink/CropLife Brazil

## AVERAGE ADOPTION RATE (AREA) BY SEGMENT

Biofungicides  
**from 11%**  
**to 12%**

Bioinsecticides  
**from 19%**  
**to 21%**

Bionematicides  
**from 24%**  
**to 25%**

Bionoculants  
**from 61%**  
**to 63%**

Nutrient solubilizers  
**from 3%**  
**to 4%**

Source: Blink/CropLife Brazil



## MAIN SEGMENTS BY CROP

Cotton and soy:  
**bionematicides**

Sugarcane and corn:  
**bioinsecticides**

Soy and corn:  
**bioinsecticides**

FV:  
**Bioinsecticides and biofungicides**

Source: Blink/CropLife Brazil

## NATIONAL SCENARIO

**Growing interest in low-impact agriculture**

**Biological Products:**  
**A viable alternative for more  
sustainable production**

Source: Blink/CropLife Brazil



## **PUBLIC POLICIES**

### **INCENTIVES FOR AGRICULTURAL PRODUCTION**

**HARVEST PLAN HAS  
REDUCED INTEREST  
RATES FOR SUSTAINABLE  
PRACTICES.**

**STATES REQUESTED  
PRIORITY CREDIT FOR  
THE SAME PRACTICES.**

### **REGULATORY FRAMEWORK**

Source: Blink/CropLife Brazil



## **GROWTH FACTORS**

- **Industry professionalization and expansion**
- **Integrated management**
- **Increased adoption among producers**
- **New formulations and technologies**

Source: Blink/CropLife Brazil



## MARKET SITUATION

**A challenging year for the agricultural inputs industry.**

### **CHALLENGES:**

- **Climate-related challenges**
- **Regularization of inventory levels, particularly among retailers**
- **Reduced commodity prices**

### **OPPORTUNITIES:**

- **Cost-benefit ratio**
- **Synergy of adoption with other agricultural technologies**

### **RESULTS:**

- **Increased investment in innovation**
- **Portfolio expansion**

**Nevertheless, bioinputs continue to expand.**





Together for the <future>

<**Thank you**>

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