bpia 2025 Annual Meeting

Biofertilizers vs. Biostimulants

Market Perspective

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Biostimulant

BPIA supported working definition

Plant biostimulant means a substance, micro-organism, or mixture thereof, that, when applied to seeds, plants, the rhizosphere, soil, or other growth media, act to support a plant's natural processes independently of the biostimulant's nutrient content, including by improving nutrient availability, uptake or use efficiency, tolerance to abiotic stress, and consequent growth, development, quality, or yield.

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Biofertilizer

No clear global definition of biofertilizer

DunhamTrimmer® defines biofertilizers narrower than BPIA, as products

- Whose value is predominantly based upon microbial activity and exclude products whose main activity comes from other natural components
- With the main function and purpose of Nutrient Use Efficiency (NUE)
- With effects more directly identifiable as Plant Growth Promotion (PGP)

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Biofertilizer vs. Biostimulant Market Perception

- Currently several market research studies already include Biofertilizers as part of Biostimulants analysis and from growers' perspective Biofertilizers are part of Biostimulants

- From regulatory perspective Biofertilizers may become in the future defined as a subset of Biostimulants

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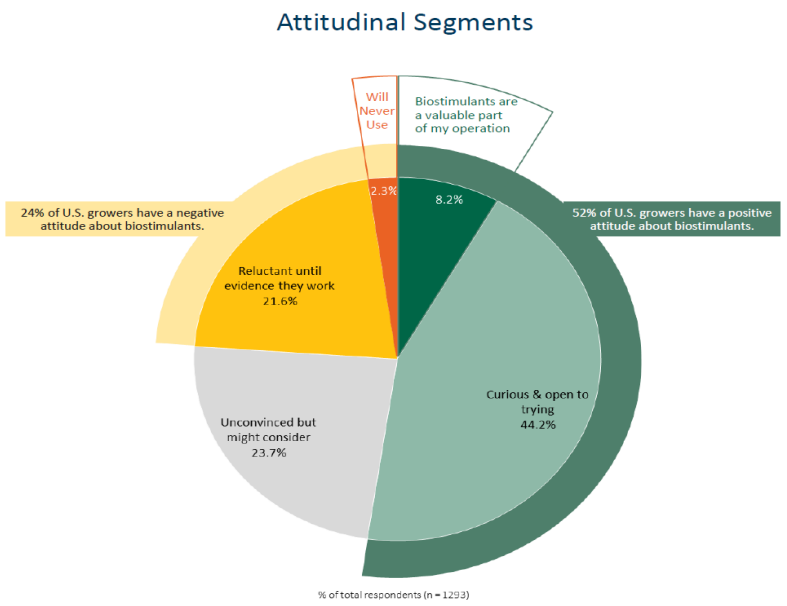
Biostimulants/Biofertilizer US Growers Perception

In 2023 52% of U.S. growers have a positive attitude about biostimulants with the most positive segments of large farms and younger growers intending to grow usage in their operation



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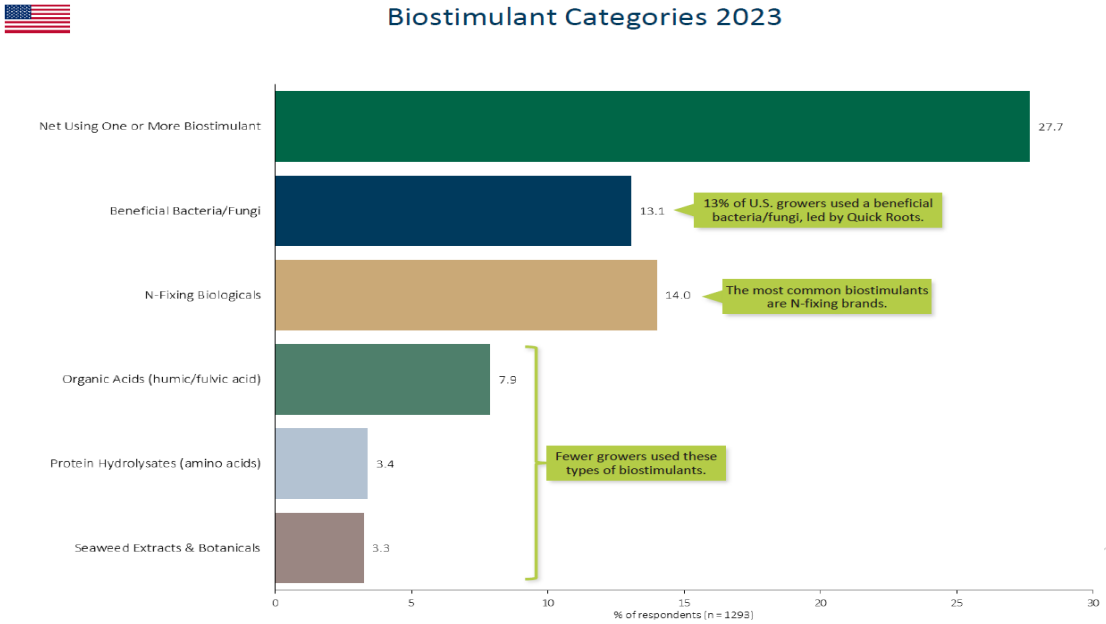
Stratus Market Research, Tracking Biostimulants US and Canada, 2023

Biostimulants/Biofertilizer US Growers Usage

27% of U.S. growers reported USING one or more biostimulants in 2023 with biofertilizer the most common (N-Fixing products and beneficial bacteria/fungi)



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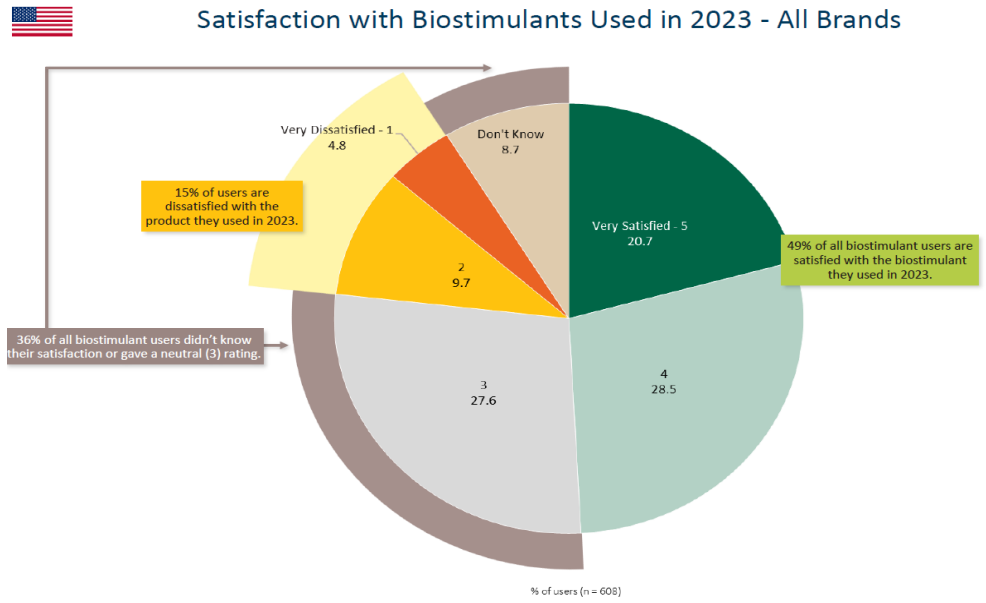
Stratus Market Research, Tracking Biostimulants US and Canada, 2023

Biostimulants/Biofertilizer US Growers Satisfaction

49% are satisfied with the biostimulant brand they used in 2023 with 28% of growers who used a brand in 2023 committed to continuing to use the brand for the next two or three years



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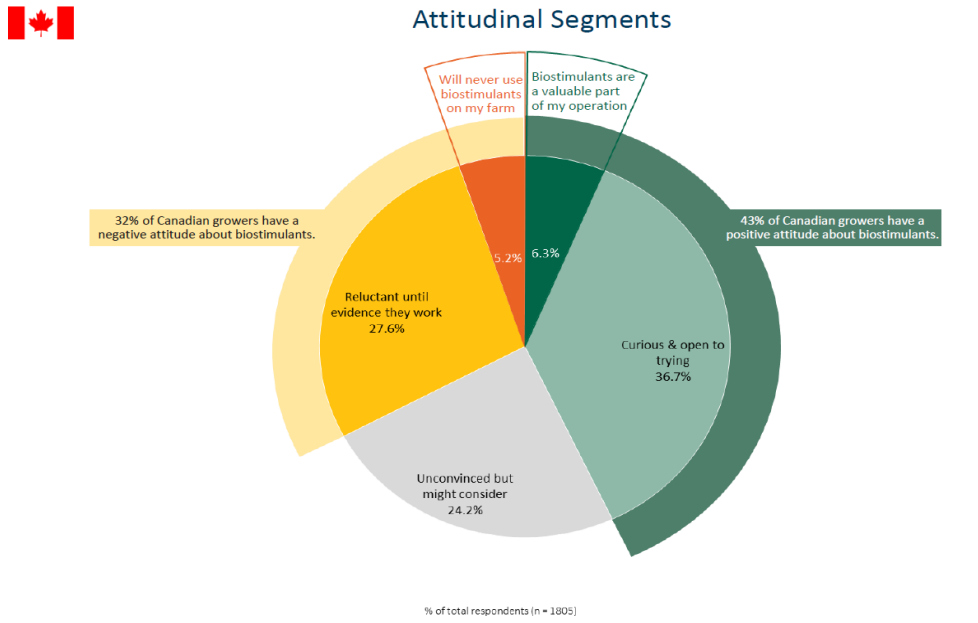
Biostimulants/Biofertilizer Canadian Growers Perception

43% of Canadian growers have a positive attitude about biostimulants, up from 37% in 2022



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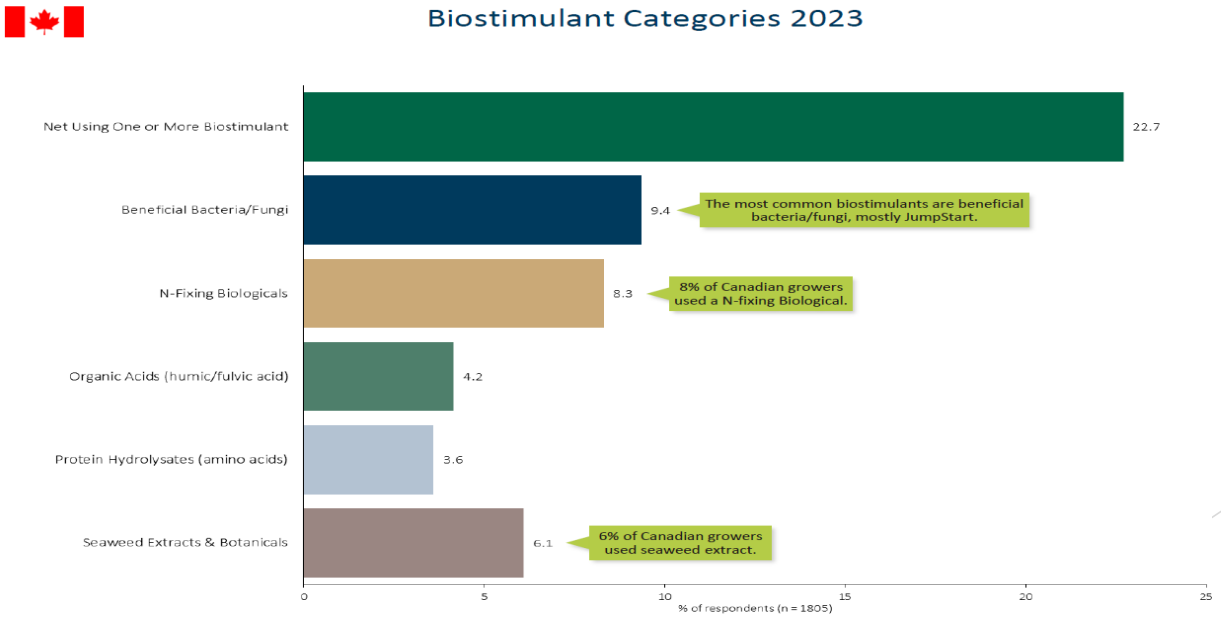
Biostimulants/Biofertilizer Canadian Growers Usage

23% of Canadian growers reported USING one or more biostimulants in 2023 with use much higher in the West (26% of growers) than in the East (18%) and biofertilizer the most common (N-Fixing products and beneficial bacteria/fungi)



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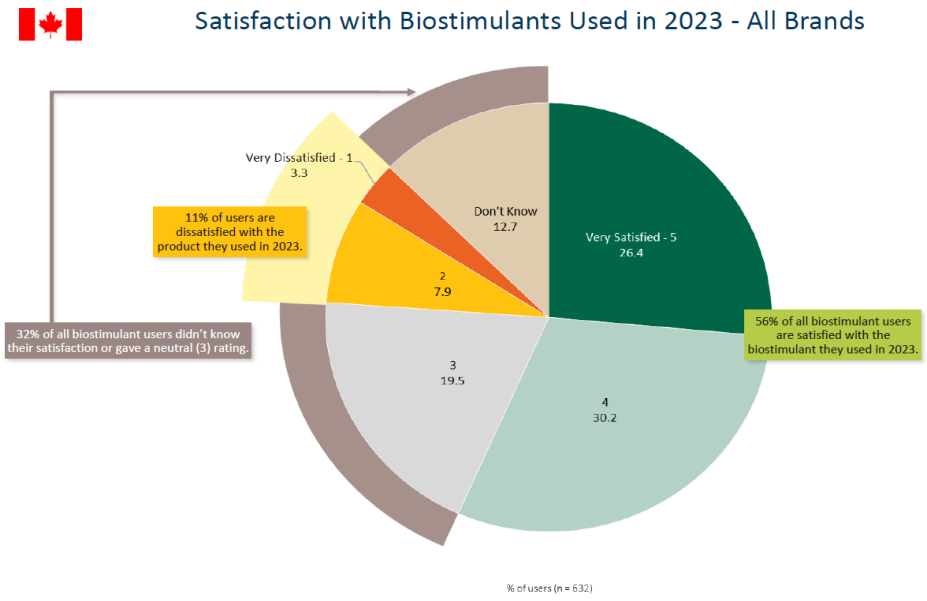
Biostimulants/Biofertilizer Canadian Growers Satisfaction

56% are satisfied with the biostimulant brand they used in 2023 with 37% of growers who used a brand in 2023 committed to continuing to use the brand for the next two or three years



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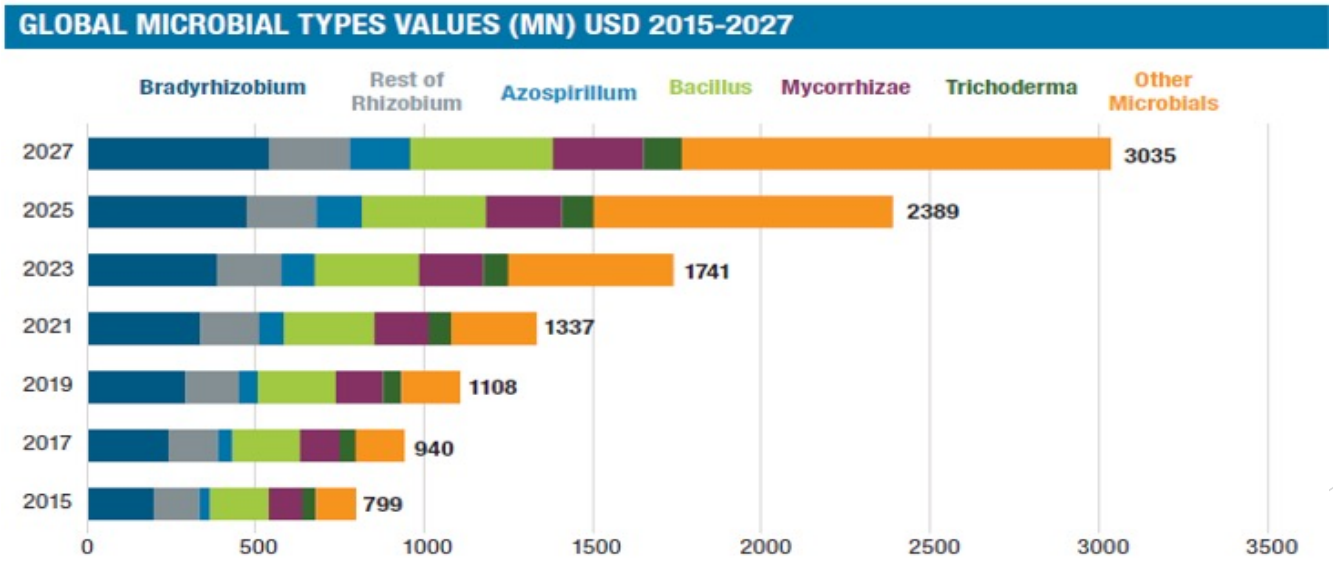
Stratus Market Research, Tracking Biostimulants US and Canada, 2023

N Fixing Microbials Driving Growth of Biofertilizer Market

With *Rhizobia, Bacillus*, and Mycorrhizae markets maturing, N fixing microbials and other NUE (Nutrient Use Efficiency) products for non Leguminosae crops drive growth of the biofertilizer/biostimulants market



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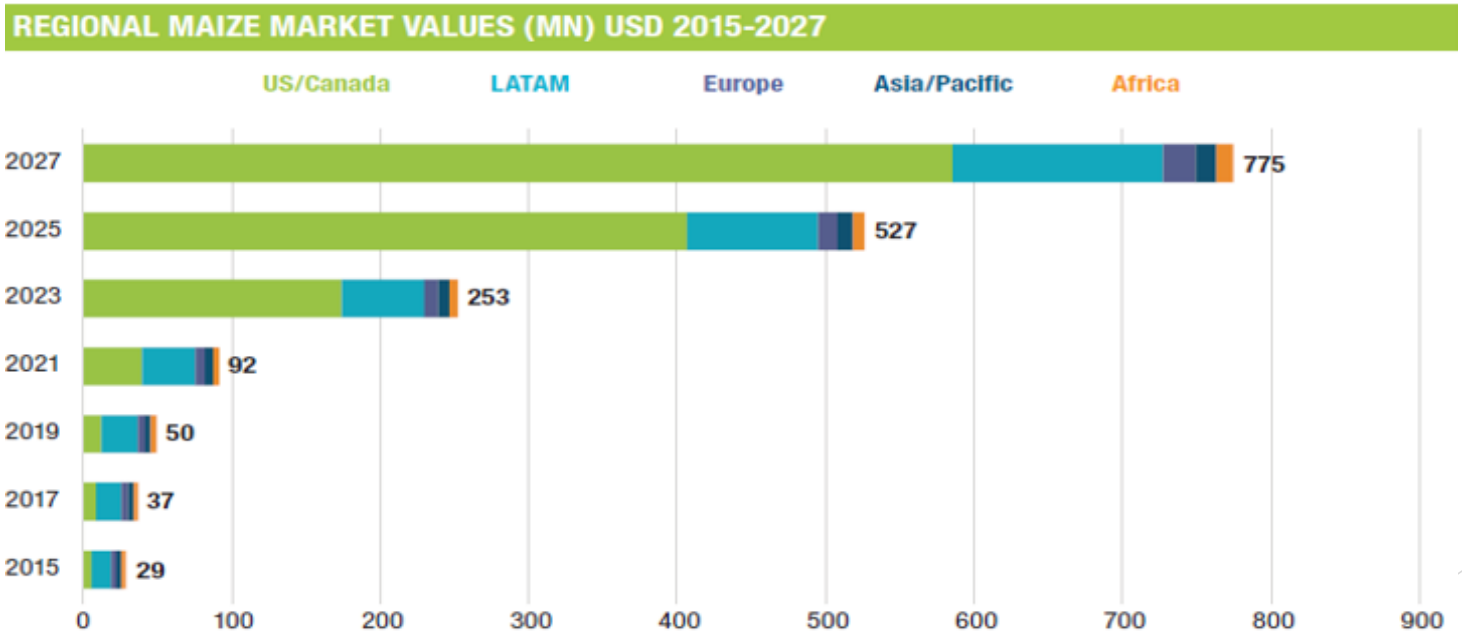
DunhamTrimmer® Global Biofertilizers Report, Market Overview, Trends, Drivers and Insights, 2022

Corn in the US Driving Growth of Biofertilizer Market

Growth driven by adoption of products for NUE



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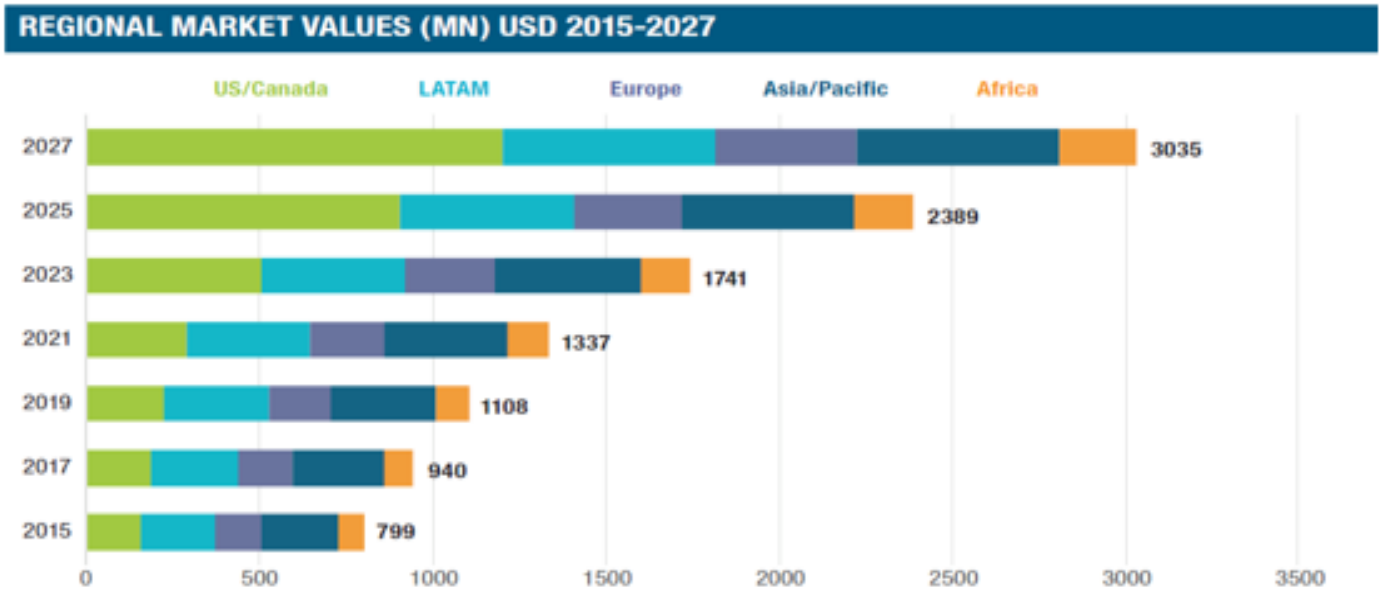
US and LATAM Driving Growth of Biofertilizer Market

Strong adoption rate in raw crops in the US and Brazil may slow down if growers' satisfaction with current NUE products declines



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Biofertilizer/Biostimulants Market Interest is Growing

- Nitrogen fixation
- Phosphate solubilization
- Micro and macro nutrients assimilation
- Production of other compounds that stimulate growth
- Enhancement of plant's health through abiotic stress resistance (e.g. drought, salinity, heat)
- Booster of soil organic matter and soil restoration
- Increased production sustainability
- Reduction of soil and water pollution

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Questions?

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