

EUROPEAN PLANT PROTECTION MARKET: Review of markets and registration constraints

19th January 2026, Dubai
Le Meridien Hotel & Conference Center

By Yves COONNIER
STAPHYT Global Business Development manager



Introduction to European market: Key facts

- Europe has been historically within global Top 3 for agrochemicals, biocontrol & fertilizers
- Evolution to new generation of plant protection products: biocontrol and biostimulants or any biosourced
- Considering EU Regulatory constraints: complex and unsure registration process



Introduction to European market: Key facts

- Europe has been historically within global Top 3 for agrochemicals, biocontrol & fertilizers
- Evolution to new generation of plant protection products: biocontrol and biostimulants or any biosourced
- Considering EU Regulatory constraints: complex and unsure registration process



Introduction to Europe from geography



EU Agricultural data

| Country | Surface (ha) | % | Country | Surface (ha) | % |
|----------------|--------------|-------|-----------------|--------------------|-------------|
| France | 27 739 430 | 15,9% | Lithuania | 2 861 250 | 1,6% |
| Spain | 23 300 220 | 13,4% | Austria | 2 726 890 | 1,6% |
| United Kingdom | 17 096 170 | 9,8% | Denmark | 2 619 340 | 1,5% |
| Germany | 16 699 580 | 9,6% | Finland | 2 257 630 | 1,3% |
| Poland | 14 409 870 | 8,3% | Slovakia | 1 901 610 | 1,1% |
| Romania | 13 055 850 | 7,5% | Latvia | 1 877 720 | 1,1% |
| Italy | 12 098 890 | 6,9% | Netherlands | 1 847 570 | 1,1% |
| Ireland | 4 959 450 | 2,8% | Croatia | 1 571 200 | 0,9% |
| Greece | 4 856 780 | 2,8% | Belgium | 1 307 900 | 0,8% |
| Hungary | 4 656 520 | 2,7% | Estonia | 957 510 | 0,5% |
| Bulgaria | 4 650 940 | 2,7% | Slovenia | 485 760 | 0,3% |
| Portugal | 3 641 590 | 2,1% | Luxembourg | 131 040 | 0,1% |
| Czech Republic | 3 491 470 | 2,0% | Cyprus | 109 330 | 0,1% |
| Sweden | 3 028 620 | 1,7% | Malta | 10 880 | 0,0% |
| | | | Total 28 | 174 358 310 | 100% |



Main crops in EU (Million ha)

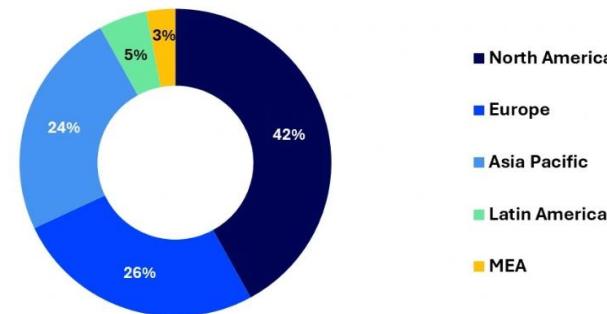
| Crop type | Area (2012) | Area (2023) | Evolution |
|------------------------|-------------|-------------|-----------|
| Cereals | 56,7 | 48,2 | ⬇️ |
| Maize | 9,8 | 9,9 | ⬆️ |
| Oil seed rape / Canola | 6,1 | 6,7 | ⬆️ |
| Olive | 4,6 | 4,6 | ➡️ |
| Vines and grapes | 3,3 | 3,3 | ➡️ |
| Sunflower | 4,3 | 5,3 | ⬆️ |
| Vegetables | 2,4 | 2,6 | ⬆️ |
| Potatoes | 1,8 | 1,5 | ⬇️ |
| Sugar beet | 1,6 | 1,6 | ➡️ |
| Pulses | 0,3 | 1,1 | ⬆️ |
| Pome fruits | 0,7 | 0,7 | ➡️ |
| Stone fruits | 0,7 | 0,6 | ⬇️ |
| Citrus | 0,5 | 0,5 | ➡️ |



Introduction to European market: Key facts

- Europe has been historically within global Top 3 for agrochemicals & fertilizers but declining in volume (but less in value)

Precedence RESEARCH Crop Protection Chemicals Market Share, By Region, 2024 (%)

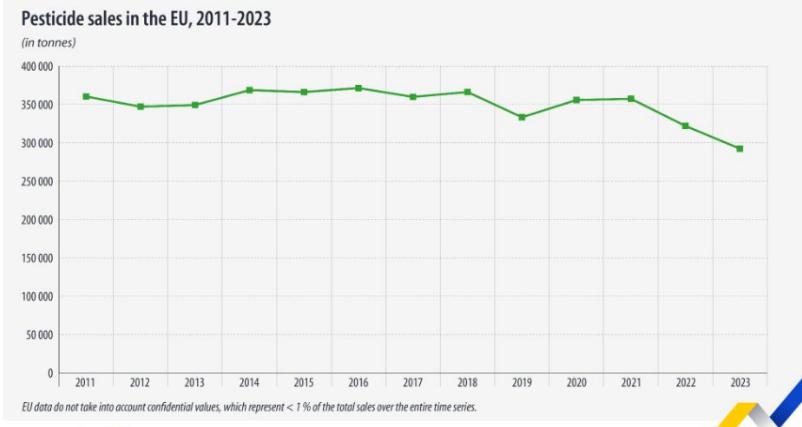


Source: <https://www.precedenceresearch.com/crop-protection-chemicals-market>



Introduction to European market: Key facts

- Europe has been historically within global Top 3 for agrochemicals & fertilizers but declining in volume (but less noticeable in value)





Introduction to European market: Key facts

- Europe has been historically within global Top 3 for agrochemicals, biocontrol & fertilizers
- **Evolution to new generation of plant protection products: biocontrol and biostimulants or any biosourced**
- Considering EU Regulatory constraints: complex and unsure registration process



Introduction to European market: Key facts

**Evolution to new generation of plant protection products:
biocontrol and biostimulants or any biosourced**

- For the first time, in EU, the number of NEW ACTIVE application for bio substances in larger than other usual chemical substances:
For the last 5 years: 35 « BIO » vs 20 « others »
(This is a trend started 1- 2 decades ago but now real!)
- It is also a strategy for usual Agchem companies to invest in «Bio» and appear greener in their communication and help to sell chemical portfolio.
- EU is also helping companies and startups to develop new concepts
- Mentalities of EU consumers: to « eat » less chemicals



Introduction to European market: Key facts

Complex and unsure EU registration process

because of:

- Withdrawal of actives substances, candidate for substitution, Pest resistances, ...
- Uncertainties and difficulties to register usual PPP in EU
- Total cost of studies

*Yes! EU Registration is a challenge but market is still attractive
You needs experts to guide you through!*



European regulations

- European regulations in force
- Successful management through expertise



European regulations in force

- Plant Protection Products Regulation (PPPR) (EC) No.1107/2009
- Fertilizing Products Regulation (FPR) (EU) No. 2019/1009

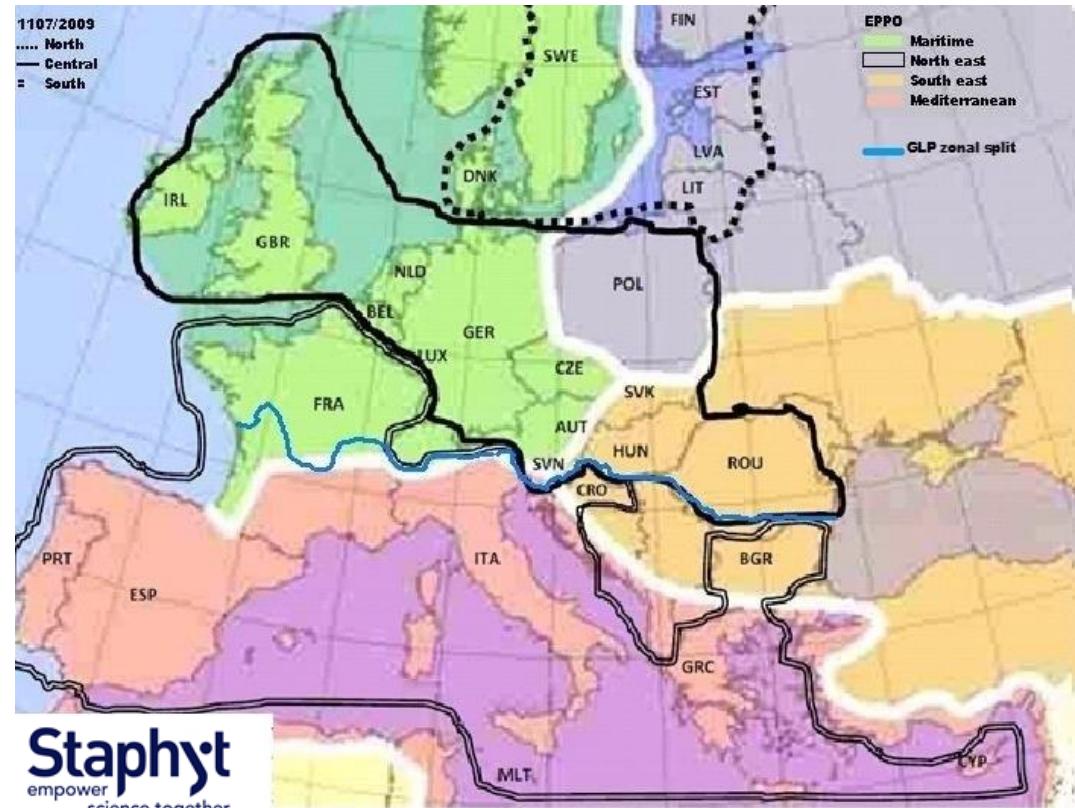
Other regulation, as reminder

- Biocidal Products Regulation (BPR) (EU) No. 528/2012
- Registration Evaluation Authorisation and Restriction of Chemicals (REACH) (EC) Reg. No.1907/2006
- Classification, Labelling and Packaging (EC) Reg. No.1272/2008
- And their equivalence in Great-Britain

Registration structure we have experience on

| PLANT PROTECTION PRODUCTS REGISTRATION EC No.1107/2009 | Substances | | Uses Fungicides Insecticides Herbicides Elicitors Growth regulator | |
|--|--|---|--|--|
| | Historical Chemical substances | | | |
| | Microbials (or extract of) (fungi, bacteria, viruses, etc.) | | | |
| | Natural substances (animal, mineral or plant origin) | | | |
| | Semiochemicals (pheromones and kairomones) | | | |
| FERTILIZING PRODUCTS REGULATION (FPR) (EU) No. 2019/1009 | Substances | Modes of action | Uses | |
| | Microbials | | Plant stimulation Soil bio-activator | |
| | Microbial, microbial, algae, plant Extracts | |  Nutrient improvement Growth improvement | |
| | Organic-mineral substances | | Abiotic stress Tolerance | |
| | Others | | Yield improvement | |
| | | There is no Plant Protection effect supported | | |

European Map for PPP registration (1107/2009)



Staphyt
empower
science together

Staphyt
empower
science together



Successful management through expertise

- **Plant Protection Products Regulation (PPP) (EC) No.1107/2009**
Staphyt achievements over last 5 years:
 - 15 active substance dossiers (new or renewal)
 - 80 PPP dossiers (Art.33 - new products; Art.43 - product renewal; Art.34 - generic products; ...)
 - 120 BAD + 20 Derogation dossiers
- **Fertilizing Products Regulation (FPR) (EU) No. 2019/1009**
Staphyt achievements each year:
 - 50 to 70 products managed every year, for registration either under the EU Regulation 2019/1009 or under the national laws (country by country) since the EU Regulation 2019/1009 is not mandatory.



Thank you!

धन्यवाद

شکر

Please ask for your free copy presentation :
ycoconnier@staphyt.com



staphyt.com

STAPHYT has PAN accreditation from GVT of India

Global reach, local presence: Staphyt's locations worldwide



 Staphyt
countries
presence

- 4 laboratories
- 50 field trials stations
- 6 regulatory affairs offices
- 150+ Agronomists
- 120+ Regulatory Advisors



Staphyt's locations Europe

