

# EUROPEAN PLANT PROTECTION MARKET: Review of markets and registration constraints

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## 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



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# Introduction to Europe from geography



## EU Agricultural datas

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%
			<b>Total 28</b>	<b>174 358 310</b>	<b>100%</b>



## Main crops in EU (Million ha)

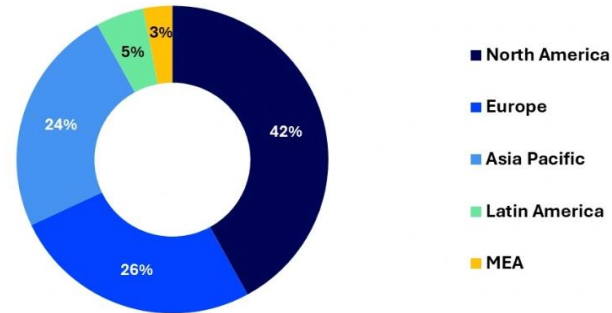
Crop type	Area (2012)	Area (2023)	Evolution
Cereals	56,7	48,2	↘
Maize	9,8	9,9	↗
Oil seed rape / Canola	6,1	6,7	↗
Olive	4,6	4,6	→
Vines and grapes	3,3	3,3	→
Sunflower	4,3	5,3	↗
Vegetables	2,4	2,6	↗
Potatoes	1,8	1,5	↘
Sugar beet	1,6	1,6	→
Pulses	0,3	1,1	↗
Pome fruits	0,7	0,7	→
Stone fruits	0,7	0,6	↘
Citrus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



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)

Pesticide sales in the EU, 2011-2023

(in tonnes)



EU data do not take into account confidential values, which represent < 1 % of the total sales over the entire time series.

eurostat





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- Europe has been historically within global Top 3 for agrochemicals, biocontrol & fertilizers
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## 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 is 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**

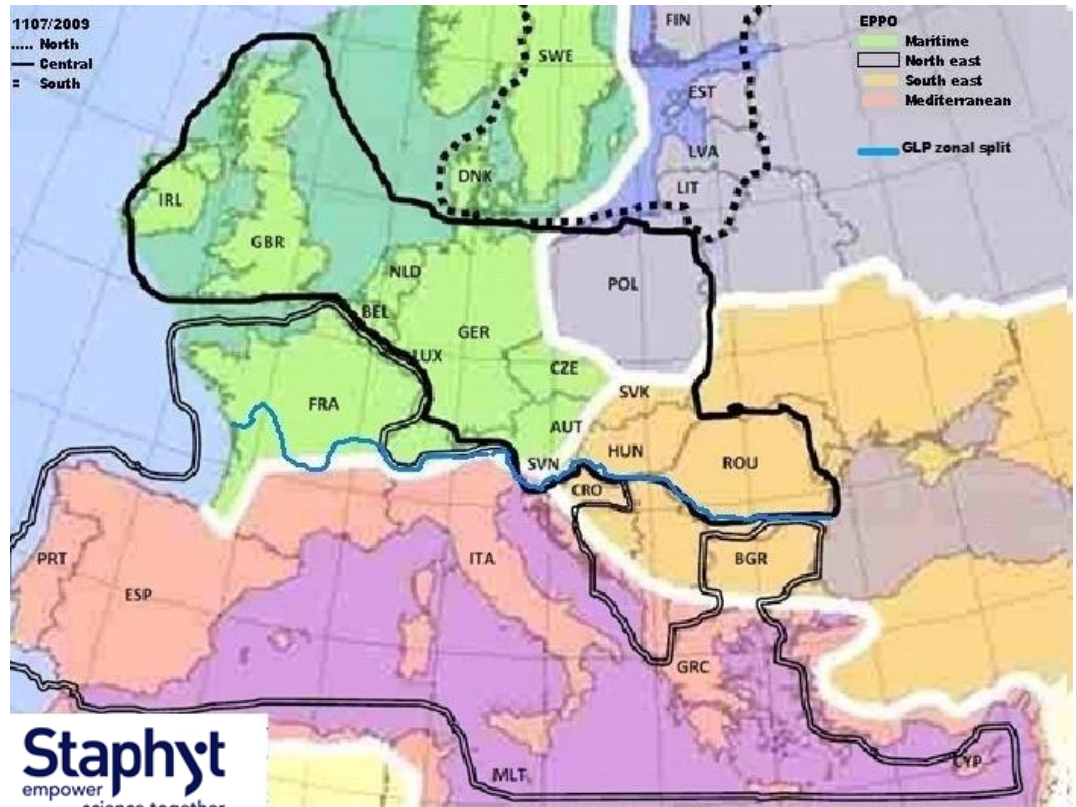
- Biocidal Products Regulation (BPR) (EU) No. 528/2012
- Registration Evaluation Authorisation and Restriction of Chemicals (REACH) (EC) Reg. No.1907/2006
- Classification, Labelling and Packaging (EC) Reg. No.1272/2008
- And their equivalence in Great-Britain



# Registration structure we have experience on

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

# European Map for PPP registration (1107/2009)





## Successful management through expertise

- **Plant Protection Products Regulation (PPPR) (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!

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## Global reach, local presence: Staphyt's locations worldwide



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





# Staphyt's locations Europe



● Laboratory

● Field station

● Regulatory