



Agricultural Biotechnology: Emerging Technologies and Global Markets

Mar 2017 • BIO100C

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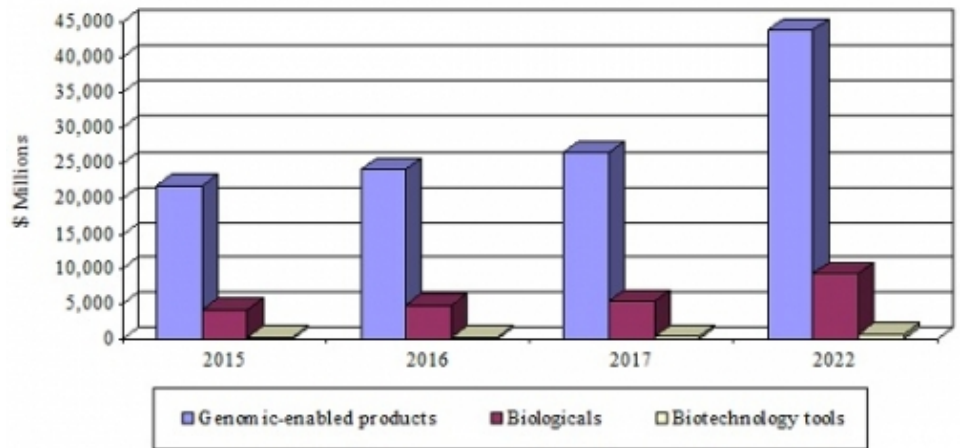
- Analyze existing and future agricultural biotechnology products and technologies that will be commercially important.
- Receive a qualitative and quantitative description of the agricultural biotechnology industry.
- Highlight key market and industry trends, as well as quantify the main market segments.
- Receive information on agricultural biotechnologies, market applications, industry structure and competitive dynamics.




Highlights

- The global market for agricultural biotechnology reached \$29.2 billion in 2016. This market should reach \$32.1 billion in 2017 and \$53.7 billion in 2022, with a compound annual growth rate (CAGR) of 10.8%.
- Genomic-enabled products as a segment reached \$24.1 billion in 2016, and should reach nearly \$26.5 billion in 2017 and \$43.7 billion in 2022, with a CAGR of 10.6%.
- Biologicals as a segment reached \$4.8 billion in 2016, and should reach \$5.3 billion in 2017 and \$9.2 billion in 2022, with a CAGR of 11.5%.

SUMMARY FIGURE
GLOBAL MARKET FOR AGRICULTURAL BIOTECHNOLOGY, BY SEGMENT, 2017-2022
(\$ MILLIONS)



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Source: BCC Research

Introduction & Scope

INTRODUCTION

STUDY GOALS AND OBJECTIVES

BCC Research's goal for this study is to determine the specific applications and forecast global market demand for agricultural biotechnology products over a five-year period from 2017 through 2022. The main objective is to characterize and quantify the agricultural biotechnology products market by product type, geography, and purpose. In addition, the report analyzes the industry structure, competitors, strategic alliances, and intellectual property landscape. A total of 70 companies in the industry are profiled.

Agricultural biotechnology markets analyzed in this report include biotechnology tools, genomics enabled products, and biologicals. Biotechnology tools include DNA sequencing, biochips, RNA interference, synthetic biology, and genome editing. Genomics enabled products include biotech seeds and synthetic biology-enabled products. Biologicals include biopesticides, biostimulants, and genetic biologicals.

A key objective of the report is to provide a comprehensive analysis of the agricultural biotechnology industry, with an emphasis on products and technologies that are commercially important in the 2017 to 2022 time-period. Market segments with rapid growth rates are highlighted, as well as those segments with large market potential. This analysis provides a quantitative basis and market context for companies to make strategic choices about participation in the agricultural industry.

The study will be particularly useful to those companies developing new genomics or proteomics technologies; discovering and development novel seed traits; doing plant breeding; interested in using novel biotechnologies in agriculture; or working in

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advanced biotechnology fields like genome editing, synthetic biology, RNA interference, biochips, or DNA sequencing.

The study will also be useful to government agencies or institutions that are developing strategic initiatives for a country's agriculture policy and/or industry.

REASONS FOR DOING THE STUDY

Agriculture is a fundamental and strategic component for a country. As a result, agricultural technologies provide competitive geographic advantage and are highly desirable. Biotechnologies address the pressing industry need for higher crop yields. Agricultural biotechnology is a key and growing component of the global agriculture industry and is thus of interest to a wide audience.

This report seeks to provide a qualitative and quantitative description of the agricultural biotechnology industry so that emerging market opportunities can be identified and exploited by the reader.

The report does this by examining the main product applications and markets, helping companies to prioritize product opportunities and strategic opportunities. The report highlights key market and industry trends, as well as quantifying the main market segments. The reader is thus able to better understand industry structure and changes occurring in the industry.

Rapid changes in technology-intensive fields such as DNA sequencing, genome editing, and synthetic biology are driving new products and applications in agriculture. These developments create unique market opportunities. This report analyzes these trends and their impact on future markets for agricultural products.

Based on these market and technology dynamics, it is especially timely to examine the agricultural biotechnology industry.

INTENDED AUDIENCE

This study examines and analyzes existing and future agricultural biotechnology products and technologies that will be commercially important.

Markets are presented by product type, crop type, and geographical region. Important market segments covered include the main biotechnologies (DNA sequencing, biochips, RNA interference, synthetic biology tools, and genome editing tools) as well as synthetic biology-enabled chemicals and biofuels, biotech seeds, and biologicals.

In-depth coverage is provided for agricultural biotechnologies; growth driving forces; market applications; industry structure and competitive dynamics; companies and industry alliances; future market potential and product sales forecasts for the period 2017 through 2022. The report forecasts the future value of agricultural biotechnology products by product type and geography.

This report will be of particular interest to agriculture, chemicals, bio-energy, and biotechnology companies; as well as suppliers of genomics tools, synthetic biology, RNA interference, and DNA sequencing products. It will also be of interest to professionals within governments, think tanks, and regulatory agencies to understand the end uses of these technologies in agriculture.

SCOPE AND FORMAT

The study scope includes key agricultural biotechnology tools (i.e., next generation DNA sequencing, biochips, RNA interference, synthetic biology tools and genome editing tools); synthetic biology-enabled chemicals and biofuels; biotech seeds; and biologicals.

BCC analyzes these technologies and products to determine present and future market sizes, and forecasted growth from 2017 through 2022. The report also discusses

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industry strategic alliances, industry structures, competitive dynamics, patent status, and market driving forces.

BCC provides in-depth coverage of the agricultural biotechnology industry structure, including genomics technology providers (e.g., genome editing, NGS, microarray companies); major seed companies; biotech traits companies; synthetic biology tools companies; companies developing plant feedstocks; and agricultural biologicals companies. It provides an in-depth analysis of major industry acquisitions and alliances during 2015 and 2016.

70 agricultural and biotechnology companies are profiled in this report.

METHODOLOGY

BCC Research examined key users and producers in each of the end-user market segments and technology fields that will be commercially important during the next five years. Discussions with industry thought leaders, as well as secondary market research was performed.

Based on our analysis, we project the future applications of agricultural biotechnologies in the major end-user market segments and by technology type, and forecast sales revenues for 2017 through 2022.

INFORMATION SOURCES

BCC Research performed primary and secondary research for this report. Primary sources included key industry companies and leading research institutions. In addition, data were compiled from secondary sources, including company websites and industry, trade and government publications.

ANALYST'S CREDENTIALS

John Bergin is the author of previous BCC biotechnology reports titled Next Generation Sequencing: Emerging Clinical Applications and Global Markets; Epigenomics: Emerging Opportunities in Biomarkers, Diagnostics and Therapeutics; Global Biochip Markets: Microarrays and Lab-on-a-chip; RNA Interference in the Post-Genomics Era: Markets and Technologies; DNA Sequencing: Emerging Technologies and Applications; Biologic Imaging Reagents: Technologies and Global Markets; and Synthetic Biology: Emerging Global Markets.

Mr. Bergin has held business development, sales and marketing positions with a Fortune 500 advanced materials company, as well as executive management positions with a nanotechnology/separations company. Mr. Bergin holds a BS degree in Chemistry, an MS degree in Biotechnology and a Masters of Business Administration.

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