


Agriculture Biologicals Syndicated Research

A quantitative market research report for agricultural
manufacturers to the U.S. row crop market

Spring 2022



Prepared in Collaboration
with 9 North Group



Biologicals have gained credibility in the past 15 years, yet there has yet to be widespread market adoption. The use of microorganisms to improve crop outcomes and soil health has attracted grower attention and many believe the use of biologicals could become commonplace in just a handful of years. Biologicals have faced skepticism from many growers yet when they see the merit of the solutions, the attitude quickly changes.

The question remains: What will it take to drive market adoption?

Farm Journal's **Biologicals Survey Research** is designed to assist suppliers and manufacturers in gaining a deeper understanding of the current biological landscape, including growers' needs, drivers of adoption, future intentions as well as their current biological usage. These insights will enable you to make data-driven, customer-centric business decisions in the biological market.



Biological Sub-Category Definitions



Biofertilizer

Products contain living microorganisms that, when applied to the seed, plant or soil, and inhabit the area around the roots or live in the roots. These microorganisms promote plant growth by increasing the supply or availability of nutrients, by stimulating root growth or by aiding other beneficial symbiotic relationships.



Biostimulant

A diverse group of materials that are used to improve crop vigor, quality, and yield, as well as tolerance to abiotic stresses (drought, salinity, heat, etc.). Biostimulants can work in many different ways, including facilitating nutrient uptake, enhancing the development of soil microorganisms, and stimulating root growth to increase water use efficiency.



Biopesticide

Products that protect against or are used to directly control fungal and bacterial pathogens, insect pests, or weeds. These may be termed biofungicides or biobactericides, bioinsecticides, or bioherbicides. Biopesticides generally only impact the target pest and closely related organisms, in contrast to broad spectrum, conventional pesticides that may affect organisms as different as birds, insects and mammals.

Methodology

Online survey of 345 U.S. corn and soybean growers

Farm operations of 500+ acres

Primary decision-makers

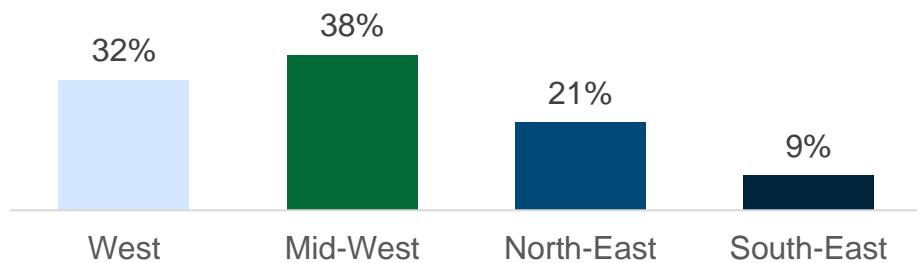
Surveys completed from:
March 17 – April 11, 2022



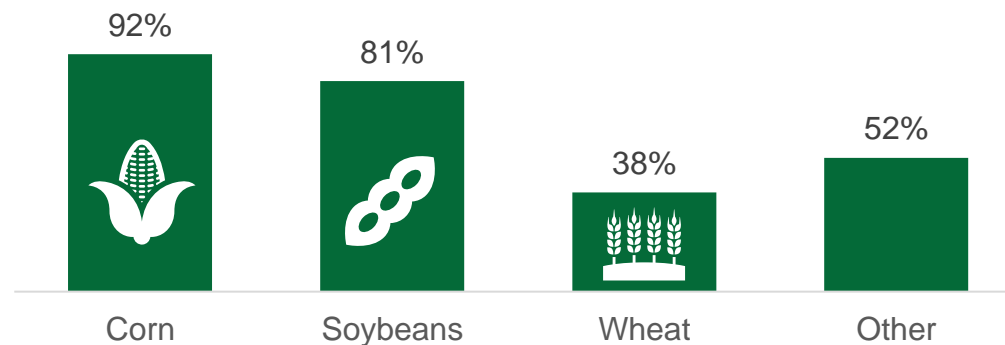


Respondent Profile

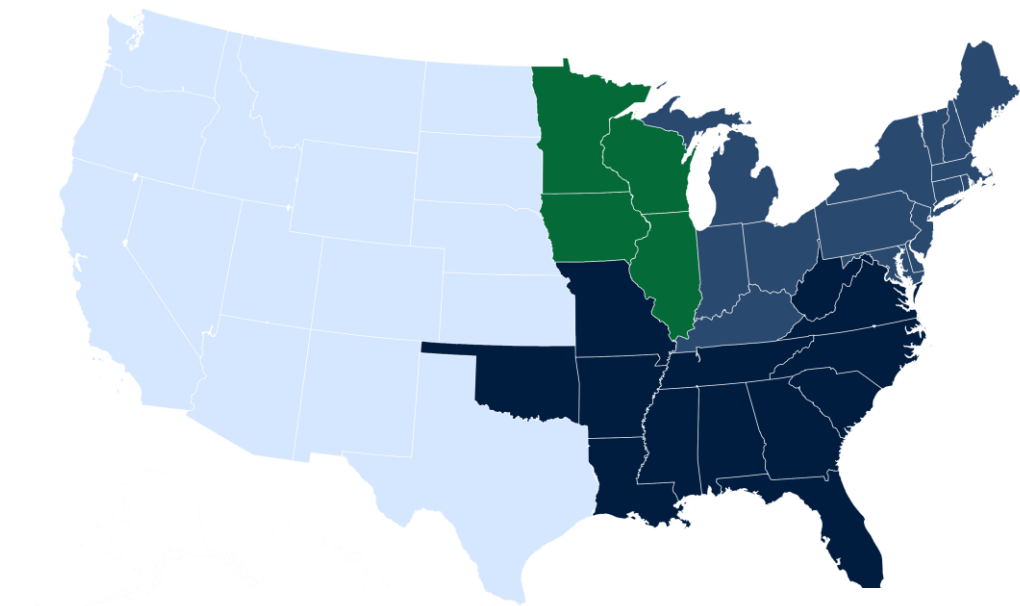
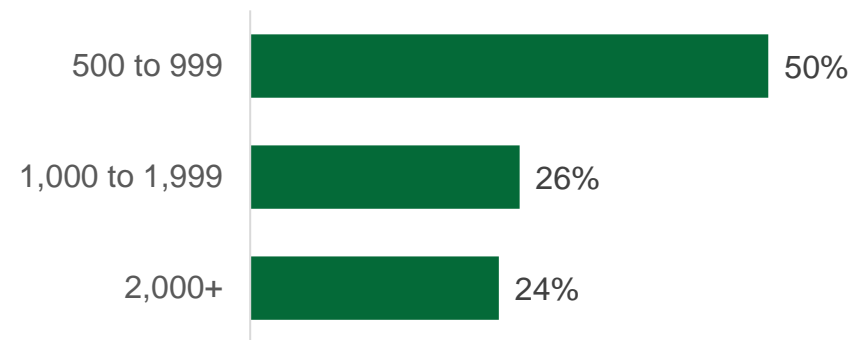
Region



Crops Grown



Number of Acres





Farmer demographics are nearly identical across all three sub-categories of farmer



BIOFERTILIZER



Operation Size

750 acres



Operation Income

\$489,200 segment median



Age

62 years median age



Has Succession Plan

44.4% of surveyed audience (segment)



Early Adopters

40.6% of surveyed audience (segment)



Print Activity

90.3% of segment



BIOSTIMULANT



Operation Size

806 acres



Operation Income

\$511,055 segment median



Age

61 years median age



Has Succession Plan

47.4% of surveyed audience (segment)



Early Adopters

43.8% of surveyed audience (segment)



Print Activity

87.9% of segment



BIOPESTICIDE



Operation Size

800 acres



Operation Income

\$558,161 segment median



Age

63 years median age



Has Succession Plan

42.5% of surveyed audience (segment)



Early Adopters

33.8% of surveyed audience (segment)



Print Activity

89.3% of segment



**Interested in full access to
the study, contact Dustin
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About Farm Journal

Farm Journal is the nation's leading business information and media company serving the agricultural market. Started 145 years ago with the preeminent Farm Journal magazine, the company serves the row crop, livestock, produce and retail sectors through branded websites, eNewsletters and phone apps; business magazines; live events including conferences, seminars and tradeshow; nationally broadcasted television and radio programs; a robust mobile-text-marketing business and an array of data-driven, paid information products.

Farm Journal also is the majority shareholder of the online equipment marketplace, Machinery Pete LLC. In 2010, the company established the non-profit, public charity, Farm Journal Foundation, dedicated to sustaining agriculture's ability to meet the vital needs of a growing population through education and empowerment.

About 9 North Group

9 North Group provides growth strategy consulting and implementation services to help agribusinesses achieve critical business goals. Using our unique capabilities and experience successfully bringing new products to market, 9 North Group helps build integrated commercial plans that drive success and growth for your business in both the short and long term.

We collaborate with key stakeholders to build plans that will drive the most impact for your organization. Our approach takes a holistic view of the commercial organization to develop a strategy that works across integral functions such as commercial operations, marketing, sales and product management.

Whether you're a start-up looking to enter the US market or a multi-national trying to unlock new business opportunities, 9 North Group will develop pragmatic solutions that will enable you to compete and win across the industry.

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