What is IBMA?

- IBMA is a European focused organisation representing the views of biological control manufacturers, distributors and other biocontrol specialists
- Established in 1995
- 207 members (6 original founding members)
- HQ in Brussels, in COPA–COGECA building
- Diverse membership
  - SME’s to multinationals
  - Organic & pure biocontrol companies to IPM providers
  - Principally involved in agriculture & horticulture
- High Growth industry >10% pa
- High % level of investment in R&D
IBMA UK

- IBMA UK has 25 members representing manufacturers, distributors, consultants and research organisations
  - Consultation with policy makers and regulators at EU and national level
  - Advice and support to members and the wider industry
  - Promotion of biocontrol & IPM
IBMA UK members include

- Syngenta, Bayer, BASF, Certis
- Koppert, Syngenta Bioline, Certis BCP, Wyebugs
- Barrier Biotech, ECOspray
- Exosect, Oxitec, Russell IPM
- Fargro

- STC, CABI, HDC
- Rationale Biopesticides Consultants, Biosphere Consulting, TSGE
IBMA – Europe

- Executive Director
- Administration
  - Administrative officer
- Regulatory Affairs Consultants
- Member Representatives
  - Board Officers
  - Executive Committee Officers
  - Professional Groups
  - Working Groups
- National organisations / committees
IBMA Professional Groups

Microbials
- Viruses, Bacteria & Fungal Pathogens

Macrobials
- Predatory mites & insects, nematodes

Semiochemicals
- Pheromones, Plant volatiles

Natural Products
- Plant extracts, Seaweed products & Basic substances
IBMA – sustainable crop protection

- Agro-ecosystem
- Monitoring
- Crop botany
- Synthetic Chemical pesticides
- Macro-organisms
- Nematodes
- Insect mite
- Biopesticides
- Fungi
- Bact.
- Virus
- Micro-orgs
- Semio-chems
- Pheromones
- Botanicals

IPM

IBMA – International Biocontrol Manufacturers Association
Focus of IBMA?

- Ensuring proportionate regulation of members’ products
- Promoting the interests and activities of the sector and its’ members
- Accelerate the strong growth in the use of biocontrol products
- A strong European focus, but establishing a global network
- Promote diversification into other areas
What is the market for IBMA members

Conventional agriculture
- Is core to widespread adoption across food value chain
- Is predominately where biocontrol industry will grow
- Is where the greatest demand is for help & support
- Is where most IPM tools exist
- Is where IPM tools are most needed

Organic agriculture
- important supporters
- Niche markets for most members
Biocontrol (IPM) successes

- Fresh produce, from protected salad crops to field grown soft fruit relies on IPM for pest and increasingly disease control.

- Organic top fruit and field vegetables

- 20 plus biopesticides now registered, many more in the pipeline.

- Innovative successful businesses with reliable robust products and excellent crop advisors.
What are the challenges to the biocontrol industry?

- Move the industry from fresh produce to major agricultural commodities

- Ensure global availability and adoption
  - Global federation of regional biocontrol associations
  - Access to new solutions from all regions
  - Market access

- Produce robust reliable tools for farmers and advisors
What are the challenges to the biocontrol industry?

- Communication of needs, solutions and knowledge with farmers and advisors
- Formulation, shelf-life & application technology
- Simplify the decision making process
  - Basic systems based programmes
    - With tailoring for regional and local situations
- Work effectively with all partners from farmers to consumers ensuring tools and research are fit for purpose
Opportunities & challenges to IBMA and members with regard to recent Multinational interest in the industry?

- Increased investment in the industry
- Rise in credibility to the industry
- Inflow of expertise – utilising expertise to benefit of all parties
- Participation & contribution of multinationals
- Representation at key events
- Opportunities for large projects
- Funding Opportunities

*A game changer for biocontrol*
The submitted NAPs are very diverse, from the very unambitious to the ambitious

Few member states deal adequately with the issues of IPM and alternatives

Indicators for the adoption of IPM and alternatives are still (very slowly) being developed

http://ec.europa.eu/food/plant/pesticides/sustainable_use_pesticides/national_action_plans_en.htm
IBMA comments;

- Biopesticide development still being held back by a regulatory system designed for chemicals

- IBMA fully recognise and agree regulatory systems are needed, but appropriate and proportionate

- Effective resourcing of regulatory authorities to achieve the aims of the SUD with knowledgeable and experienced staff.
Knowledge transfer – IPM is complex and knowledge intensive.

There is a requirement for further and extensive knowledge transfer activities, which will require some public funding but commitment across all stakeholders.

- UK has an excellent reputation for agronomy – high training standards
- Need commitment from all parts of the industry – regulators, manufacturers, marketing companies, advisors and end users.
- Who is going to pull this together?
- How is it going to be funded?
UK NAP IPM research and development

“CRD programme on developing novel alternative mechanisms .......... to enable industry to develop further measures for integrated or biological control....”

Too much R&D is poorly focused to industry needs.

- Application technology for alternatives
- Generic studies, e.g. environmental fate to inform regulatory decision making
Pesticide usage survey, an excellent tool but:

- Frequency of surveys

- Making data available quickly

- Recognise that horticultural crops will adopt IPM (biopesticides) more readily and rapidly than agriculture.

- Little recognition of non–pesticide techniques; predators and parasites, nematodes, monitoring systems etc…. How are they to be measured?

- Survey needs expanding to collect data on alternative approaches, not just pesticides
• Lacks ambition, dwells in the past, little new

• Relies on existing schemes and practices

• Promotion of IPM is unclear and unambitious, need to identify funding and support activities

• Promotion of alternatives relies on the Biopesticide Scheme – welcome, but what about encouraging uptake?

• R&D needs to be more focused and applied, much in the past has failed to have any real impact.
IBMA UK view of the UK NAP

• A lack of quantitative targets, measures, indicators and timetables to drive and measure progress. Where are the specific activities?

• IBMA members will be supplying many of the IPM tools for the NAP, yet not represented on the Pesticides Forum
The fit of tools within environmental and agricultural parameters

Environmental Index

Productivity Index

Where we will see true innovation?