BioPesticide Industry Alliance

- Mission and Purpose
- Background
- Recent accomplishments and future activities
Biological Pesticide Market

[~ 1.5+% of global pesticide market]

- Microbials: $160M
- Pheromones: $60M
- Beneficial Insects: $40M
- Biochemicals: $40M
Mission:

✓ Improve the global perception of biopesticides as effective products

✓ Facilitate the successful registration process of biopesticides
Purpose:

- Develop and promote industry standards for biopesticides
- Demonstrate that biopesticides are effective products in agriculture, forestry, turf and ornamental, public health and consumer markets
- Develop strong working relationships with the authorities that regulate biopesticides and become a resource to these regulatory authorities
- Become a leading source of information on biopesticides

www.biopesticideindustryalliance.org
Background

• First organized in 2000, based on the need for dedicated representation of the biopesticide industry participants

• Biopesticide definition based on EPA guidelines
  – Microbials
  – Biochemicals
  – PGRs
  – Excludes GMO plant pesticides
• Formalized as a 501(c) non-profit trade organization in 2003

• Today, an alliance of 28 companies and consultants whose primary focus is biopesticides
Main Reasons Biopesticides Used  
(from 2003 BPIA Market Survey)

<table>
<thead>
<tr>
<th>Reason Volunteered</th>
<th>CA PCA</th>
<th>FL Distributor</th>
<th>CA Grower</th>
<th>FL Grower</th>
<th>Golf Supt.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmentally Safe:</td>
<td>30%</td>
<td>46%</td>
<td>43%</td>
<td>30%</td>
<td>75%</td>
</tr>
<tr>
<td>Operator Safety:</td>
<td>23%</td>
<td>29%</td>
<td>20%</td>
<td>23%</td>
<td>15%</td>
</tr>
<tr>
<td>Product Efficacy:</td>
<td>17%</td>
<td>29%</td>
<td>17%</td>
<td>13%</td>
<td>5%</td>
</tr>
<tr>
<td>More Natural/Safe:</td>
<td>10%</td>
<td>11%</td>
<td>10%</td>
<td>13%</td>
<td>15%</td>
</tr>
<tr>
<td>Public Perception:</td>
<td>9%</td>
<td>--</td>
<td>3%</td>
<td>7%</td>
<td>13%</td>
</tr>
<tr>
<td>Safe to Beneficials:</td>
<td>9%</td>
<td>4%</td>
<td>3%</td>
<td>10%</td>
<td>--</td>
</tr>
<tr>
<td>Organic Farming:</td>
<td>13%</td>
<td>--</td>
<td>--</td>
<td>3%</td>
<td>--</td>
</tr>
</tbody>
</table>
Main Reasons Biopesticides Not Used
(from 2003 BPIA Market Survey)

<table>
<thead>
<tr>
<th>Reason Volunteered</th>
<th>CA PCA</th>
<th>FL Distributor</th>
<th>CA Grower</th>
<th>FL Grower</th>
<th>Golf Supt.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not as Effective:</td>
<td>44%</td>
<td>50%</td>
<td>27%</td>
<td>13%</td>
<td>30%</td>
</tr>
<tr>
<td>Higher Cost:</td>
<td>46%</td>
<td>36%</td>
<td>23%</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Lack of Awareness:</td>
<td>14%</td>
<td>29%</td>
<td>47%</td>
<td>47%</td>
<td>43%</td>
</tr>
<tr>
<td>Old Habits:</td>
<td>4%</td>
<td>--</td>
<td>13%</td>
<td>10%</td>
<td>10%</td>
</tr>
<tr>
<td>Lack of Research:</td>
<td>6%</td>
<td>7%</td>
<td>--</td>
<td>7%</td>
<td>15%</td>
</tr>
<tr>
<td>Works Too Slow:</td>
<td>10%</td>
<td>7%</td>
<td>--</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Limited Availability:</td>
<td>4%</td>
<td>7%</td>
<td>--</td>
<td>7%</td>
<td>10%</td>
</tr>
</tbody>
</table>
BPIA Operating Principles

• Products are supported that have appropriate EPA, PMRA, or EU registrations

• Proper product stewardship in the trade channel
  – Processes for maintaining product quality integrity and resolving product complaints related to product efficacy

• Scientifically valid efficacy tests supporting claims
  – Achieve commercially acceptable product efficacy levels in target geography with a minimal field trial variability

• Testimonials from peer groups attesting to efficacy claims and satisfaction with product
Recent Key Accomplishments

• Significantly enhanced professional image, including our newly redesigned web site and descriptive marketing brochure.

• Regular meetings by our Regulatory Committee with EPA’s BPPD and CA-DPR to keep our membership up to date on regulations, policies and procedures.

• Participation on a PRIA coalition to provide our collective voices on fee schedules, labeling and other regulatory process improvements.

• Joined coalition with other trade associations to submit unified comments on California DPR’s efficacy data submission proposal.

• Participation in IR-4’s strategic planning, CA-DPR’s Pest Management Advisory Committee and EPA’s annual PESP meeting.
New Website:
http://www.biopesticideindustryalliance.org
2006 Goals

- Increasing awareness of BPIA
  - Joined Plant Management Network
- Increasing participation and feedback from BPIA members
- Developing a plan for the continued development of the BPIA Standards
- Organizing a Congressional Education Meeting

Next meeting
- May 17-18, 2006 in Washington DC
BPIA Steering Committee

Olav Messerschmidt – Executive Director

Bill Foster – BioWorks (Chair)

M.D. Donaldson – Valent BioSciences Corp. (Vice Chair)

Steve Hartmeier – Suterra (Secretary/Treasurer)

Gary Libman – Emerald BioAg

Fred Betz – Eden BioSciences

Pam Marrone – AgraQuest

Amy Roberts – Technology Sciences Group
Thank You

www.biopesticideindustryalliance.org