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News Release

EU and UK Risk Falling Further Behind Global Agricultural Competitors, Weakening Strategic Autonomy

- Europe's crop output has grown more slowly than in major agricultural markets including the US, Brazil, China, Canada and India, a new study finds
- Geopolitical and climate pressures are increasing risks for farmers while global peers gain faster access to new technologies, widening Europe's resilience gap
- Consumers support science-based innovation and want farmers to have access to technologies that help strengthen food security, resilience and affordability

Leverkusen, October 15, 2026 – The EU and the UK risk falling further behind major agricultural competitors like the US, Brazil, China, Canada and India unless farmers gain faster access to innovation that can help address growing climate and productivity pressures. A more proportionate regulatory framework and more openness to new technologies could help reverse this trend. These are the main takeaways of a new report commissioned by Bayer, combining economic analysis by Oxford Economics, representative polling of more than 8,000 consumers and in-depth farmer interviews across eight European markets.

The findings identify crop agriculture as a strategically important sector that underpins food security and contributes 246 billion euros to EU GDP and 5.7 billion euros to UK GDP, with every 1 billion euros of crop agriculture output supporting almost 3 billion euros of downstream production in other sectors. However, crop output growth in Europe has significantly lagged global peers between 2011 and 2023, averaging just 0.1 percent a year. In the UK, growth was even lower, at 0.0 percent. This compares with 1 percent in the US, a global average of 2 percent, and between 2 and 3 percent in China, Canada and India. Brazil was among the fastest-growing markets, with annual growth averaging 3.3 percent over the period. The longer-term comparison is equally stark: average EU

production was only 2 percent higher than in the previous decade, compared with increases of 16 percent in the US, 44 percent in Canada and 51 percent in Brazil.

These competitive pressures are being compounded by sharply rising input costs and the growing impact of climate change. Climate-related risks already cause estimated average annual losses of 17.4 billion euros—equivalent to 6.4 percent of EU crop production—with significant variation across regions. By 2050, these losses are projected to rise to between 24.8 billion euros and 28.9 billion euros.

The research identifies a growing risk arising from the rapid pace at which pressures on farmers are intensifying, combined with the time it takes for innovations to reach the field. European farmers compete against producers from other regions who have access to a wider variety of seed technologies, crop protection solutions and digital technologies or gain access to such innovations faster. According to Oxford Economics, better access to modern technologies can support farmers in addressing the significant climate and geopolitical challenges, strengthening the agricultural sector's competitiveness and resilience.

“The EU and the UK are confronted with a widening resilience gap. To counter that, agriculture must be understood as a critical strategic sector for Europe's autonomy and competitiveness,” said Frank Terhorst, Head of Strategy & Sustainability for Bayer's Crop Science Division. “It is critical to embrace innovation as an opportunity rather than a risk to be managed. Europe has the capabilities to lead, but we need to ensure that enough solutions are available to farmers and that innovation can reach the field faster.”

Research highlights regulatory barriers to agricultural innovation

The report argues that European farmers need access to a broader range of solutions, including innovative seed technologies, modern crop protection products, precision agriculture, automation and artificial intelligence. Just recently, Bayer [announced](#) an upcoming phase of major innovation launches with new seed and trait solutions, including genome editing, and the AI-enabled discovery of new modes of action for crop protection. However, the availability of these agricultural solutions depends largely on regulatory frameworks.

The research findings highlight a growing concern among farmers that their toolbox is becoming increasingly constrained: While more than 1,000 active ingredients were authorised in the EU in the early 2000s, only around 420 remain approved today. Farmers have lost access to 92 active ingredients in the last seven years, while only one new synthetic active ingredient reached the market over the same period. The UK has approved four entirely new active ingredients since 2022 that remain unapproved or pending in the EU while maintaining approval of 15 crop protection active ingredients whose EU licences have expired or been banned since Brexit. However, the dynamic alignment with the EU regulatory framework currently under discussion could lead to a withdrawal of these approvals, potentially impacting crop yields and farm incomes if transitions are not managed carefully.

As a consequence, the research points to the need for a more predictable and proportionate regulatory environment that supports innovation while maintaining high standards of safety and stewardship. It highlights lengthy approval processes, increasing administrative burdens and slower adoption pathways as factors limiting access to new technologies across Europe.

“An approval approach based on real-world risks and benefits instead of theoretical hazards can help ensure farmers gain access to proven innovations while maintaining Europe's high safety standards. Recent UK approvals demonstrate how proportionate pathways can support quicker access to innovation,” added Frank Terhorst. “The report's findings underscore the urgent need for agricultural innovation. We invest heavily in such new solutions, and we want European farmers to benefit from them like their global peers do.”

Consumers recognise the importance of agriculture and support science-based innovation

The consumer polling reveals public awareness of the strategic importance of agriculture. Across Europe, 84 percent of consumers agree that food security is a matter of national security. Consumers see farmer resilience, food affordability and food security as interconnected elements of the same challenge.

Europeans are also broadly supportive of science and technology. 84 percent say farmers should have access to the latest technology and innovation, so that innovation moves

faster, farmers get better harvests and food prices come down. They perceive regulatory barriers, too: 77 percent say cutting bureaucracy and red tape would help make sure Europe can produce enough food. 63 percent say they are more likely to vote for a party that backed farmers using new science and technology.

“Europeans are more open to innovation and technology than many would assume. People see the connection between resilient farming, food security and affordable food,” summarised Matthias Berninger, Head of Public Affairs, Science, Sustainability & HSE at Bayer. “The findings are a call to action for political, business and civil-society leaders to champion science and new technologies. Europe has spent too much time admiring problems rather than seizing opportunities. While regulation must ensure safety and build trust, it should also enable progress in areas such as AI and agriculture. Europe must move from a culture of risk avoidance to one of innovation.” According to Berninger, Europe has exactly what it takes: “This summer’s decision on New Genomic Techniques demonstrated that Europe can choose innovation over hesitation. We must not lose that momentum. We have great farmers, scientific expertise, good soils and industrial capabilities. We now need to translate these strengths into greater resilience and competitiveness.”

About the report:

The research was commissioned by Bayer and combines economic analysis conducted by Oxford Economics, representative polling of more than 8,000 consumers and in-depth interviews with around 90 farmers across eight European markets (Benelux, France, Germany, Italy, Poland, Romania, Spain, United Kingdom). It examines the role innovation can play in strengthening the productivity, competitiveness and resilience of European agriculture, as well as the conditions affecting access to and adoption of new technologies.

Materials are available for download here:

- Overall [summary](#)
- [Economic study](#) by Oxford Economics
- Insights from the [farmer interviews](#)
- Insights from the [consumer survey](#)

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ahe (2026-0169E)

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