

Global Secondary Macronutrients Market Size Study and Forecast by Nutrient Type (Calcium, Magnesium, Sulfur), By Crop Type (Cereals & Grains, Oilseeds & Pulses, Fruits & Vegetables, Others), By Form (Dry, Liquid), By Mode of Application (Soil Application, Foliar Application, Fertigation), and Regional Forecasts 2026–2036

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Abstracts

The Global Secondary Macronutrients Market, valued at USD 39.87 billion in 2025, is projected to reach USD 61.63 billion by 2036, expanding at a CAGR of 4.05% during the forecast period. Secondary macronutrients include calcium, magnesium, and sulfur, which are essential plant nutrients required in moderate quantities to support healthy crop growth, improve soil fertility, enhance nutrient uptake, strengthen plant structure, and increase crop productivity. These nutrients play a critical role in chlorophyll formation, enzyme activation, cell wall development, protein synthesis, photosynthesis, and stress resistance. Secondary macronutrients are extensively applied across cereals and grains, oilseeds and pulses, fruits and vegetables, and other crop categories through soil application, foliar sprays, and fertigation systems.

The market is witnessing steady growth owing to increasing global food demand, declining soil nutrient quality, rising adoption of precision agriculture, and growing awareness regarding balanced crop nutrition. Farmers are increasingly utilizing secondary macronutrient fertilizers alongside primary nutrients to maximize crop yields, improve produce quality, and address nutrient deficiencies caused by intensive agricultural practices. According to the Food and Agriculture Organization (FAO, 2024), maintaining balanced soil nutrition and improving fertilizer efficiency are essential for achieving sustainable agricultural productivity and long-term food security. Continuous

advancements in specialty fertilizers, precision nutrient management, controlled-release formulations, and fertigation technologies are improving nutrient-use efficiency while reducing environmental impact. Increasing investments in sustainable agriculture, high-value crop cultivation, and integrated nutrient management practices are expected to create substantial long-term growth opportunities for the global secondary macronutrients market.

Global Secondary Macronutrients Market: Key Highlights

The Global Secondary Macronutrients Market was valued at USD 39.87 billion in 2025, driven by increasing demand for balanced crop nutrition, declining soil fertility, expanding precision agriculture practices, and rising awareness regarding the importance of calcium, magnesium, and sulfur in improving crop productivity.

The market is projected to reach USD 61.63 billion by 2036, expanding at a CAGR of 4.05% during 2026–2036. Growth is supported by increasing global food demand, adoption of sustainable farming practices, expansion of high-value crop cultivation, and continuous innovation in specialty fertilizer formulations.

Asia Pacific dominates the global market, accounting for an estimated 41.8% share in 2025. The region benefits from extensive agricultural land, large-scale cereal production, increasing fertilizer consumption, government support for nutrient management, and rising adoption of precision farming technologies across China, India, and Southeast Asia.

LAMEA is projected to register the fastest CAGR of 4.8% during 2026–2036, fueled by expanding commercial agriculture, growing investments in soil fertility improvement, increasing cultivation of export-oriented crops, and rising adoption of modern fertilizer management practices.

Sulfur dominates the nutrient type segment, accounting for an estimated 45.3% market share in 2025. Its leadership is attributed to its critical role in protein synthesis, chlorophyll formation, oilseed production, and increasing sulfur deficiencies in agricultural soils resulting from intensive farming practices.

Calcium is projected to register the fastest CAGR of 4.7% during the forecast period owing to increasing demand for improved fruit quality, enhanced plant

strength, better shelf life, and higher resistance to physiological disorders in horticultural crops.

Cereals & Grains dominate the crop type segment with an estimated 47.6% share in 2025 due to extensive global cultivation of wheat, rice, maize, and other staple crops that require balanced nutrient management to maximize productivity.

Fruits & Vegetables are projected to witness the fastest CAGR of 4.9% during 2026–2036, driven by increasing cultivation of high-value horticultural crops, growing demand for premium-quality produce, and rising adoption of precision nutrient management practices.

Dry dominates the form segment, accounting for an estimated 66.4% share in 2025, supported by ease of storage, longer shelf life, cost-effective transportation, and widespread application in conventional farming systems.

Fertigation is projected to register the fastest CAGR of 5.2% during the forecast period, fueled by expanding adoption of drip irrigation, precision agriculture, water-efficient farming, and controlled nutrient delivery systems that improve fertilizer-use efficiency and crop performance.

Research Scope & Methodology

This study provides a comprehensive strategic assessment of the Global Secondary Macronutrients Market across the forecast period of 2026–2036. The report evaluates market size, revenue forecasts, competitive dynamics, technological advancements, regulatory developments, sustainability initiatives, and emerging investment opportunities shaping the global secondary macronutrients industry. The assessment covers the complete value chain, including raw material sourcing, nutrient extraction, fertilizer formulation, manufacturing, blending, quality testing, packaging, distribution, and agricultural application across diverse crop systems. The study analyzes the market across Nutrient Type (Calcium, Magnesium, Sulfur), Crop Type (Cereals & Grains, Oilseeds & Pulses, Fruits & Vegetables, Others), Form (Dry, Liquid), and Mode of Application (Soil Application, Foliar Application, Fertigation). Regional analysis encompasses North America, Europe, Asia Pacific, and LAMEA, evaluating fertilizer consumption patterns, soil nutrient status, precision agriculture adoption, irrigation infrastructure, government agricultural policies, and crop production trends influencing

regional market growth. The report further examines advancements in specialty fertilizers, controlled-release formulations, micronutrient integration, precision nutrient management, fertigation systems, and sustainable agricultural practices that continue to reshape the competitive landscape of the secondary macronutrients industry.

The research methodology combines extensive primary and secondary research to provide reliable market intelligence and robust long-term forecasting. Primary research includes structured interviews with fertilizer manufacturers, agricultural input suppliers, agronomists, distributors, growers, research institutions, government agricultural agencies, and industry experts across major global markets. Secondary research incorporates publications from international agricultural organizations, government agencies, annual reports, investor presentations, scientific journals, fertilizer associations, regulatory databases, and authenticated market intelligence sources. Market estimates are developed using both top-down and bottom-up methodologies and validated through data triangulation to ensure consistency across all market segments and regional analyses. Forecast models integrate historical fertilizer consumption, crop production trends, macroeconomic indicators, soil fertility conditions, agricultural technology adoption, climate considerations, and evolving sustainability initiatives. Competitive benchmarking evaluates product portfolios, manufacturing capabilities, research and development investments, production capacity, strategic partnerships, distribution networks, sustainability programs, and geographic presence of leading market participants to provide a comprehensive understanding of the evolving competitive environment within the Global Secondary Macronutrients Market.

Key Market Segments

By Nutrient Type

Calcium

Magnesium

Sulfur

By Crop Type

Cereals & Grains

Oilseeds & Pulses

Fruits & Vegetables

Others

By Form

Dry

Liquid

By Mode of Application

Soil Application

Foliar Application

Fertigation

Key Market Players

Nutrien Ltd.

Yara International ASA

The Mosaic Company, ICL Group Ltd

K+S AG, EuroChem Group

OCI Global

Nufarm

Deepak Fertilisers and Petrochemicals Corporation Ltd.

Coromandel International Ltd

CF Industries Holdings, Inc.

Haifa Negev Technologies LTD

Industry Trends

Balanced nutrient management is becoming a central focus of modern agriculture as growers increasingly recognize the importance of secondary macronutrients alongside primary nutrients. Farmers are adopting integrated fertilizer programs containing calcium, magnesium, and sulfur to improve crop productivity, enhance nutrient-use efficiency, and restore long-term soil fertility.

Precision agriculture technologies are accelerating the adoption of secondary macronutrients through data-driven nutrient management. GPS-guided application equipment, soil nutrient mapping, remote sensing, drones, and variable-rate fertilizer technologies enable farmers to apply nutrients more accurately, improving crop performance while reducing fertilizer losses and environmental impact.

Sulfur deficiency is becoming increasingly prevalent across agricultural soils due to intensive farming practices, declining atmospheric sulfur deposition, and continuous cultivation of high-yield crop varieties. This trend is driving higher demand for sulfur-containing fertilizers, particularly in cereals, oilseeds, and high-value horticultural crops requiring balanced nutrient availability.

Specialty fertilizer formulations are gaining commercial importance as manufacturers develop enhanced-efficiency products with improved nutrient availability and controlled-release characteristics. Advanced formulations are helping growers optimize calcium, magnesium, and sulfur uptake while minimizing nutrient leaching and improving fertilizer-use efficiency.

Fertigation systems continue expanding across commercial agriculture as irrigation modernization accelerates worldwide. Integration of secondary macronutrients into drip and sprinkler irrigation systems enables precise nutrient delivery, improves water-use efficiency, enhances crop quality, and supports sustainable agricultural production.

Sustainable agriculture initiatives are encouraging greater adoption of environmentally responsible nutrient management practices. Farmers and fertilizer manufacturers are increasingly investing in products that improve soil health, reduce greenhouse gas emissions, optimize nutrient utilization, and support regenerative farming systems.

High-value horticultural crops are driving increased demand for calcium- and magnesium-based fertilizers. Fruit and vegetable growers are increasingly utilizing balanced nutrient programs to improve fruit firmness, shelf life, color development, and resistance to physiological disorders while meeting growing demand for premium-quality produce.

Advances in fertilizer manufacturing technologies are improving nutrient solubility, product stability, and application efficiency. Manufacturers are developing customized blends and water-soluble formulations that are compatible with precision agriculture systems and modern irrigation infrastructure.

Digital agriculture platforms and artificial intelligence are supporting more effective nutrient management decisions. Predictive analytics, crop monitoring systems, and real-time field data enable growers to optimize fertilizer application schedules, reduce input costs, and maximize crop yields under varying climatic and soil conditions.

Strategic collaborations among fertilizer manufacturers, agricultural technology companies, research institutions, and government agencies continue accelerating innovation across the secondary macronutrients industry. Investments in precision nutrient management, sustainable fertilizer technologies, specialty formulations, and climate-resilient agricultural solutions are expected to support long-term growth of the global secondary macronutrients market.

Market Determinants

Increasing Demand for Balanced Crop Nutrition: Rising global food demand and the need to improve agricultural productivity are driving greater adoption of secondary macronutrients. Calcium, magnesium, and sulfur play essential roles in plant growth,

photosynthesis, protein synthesis, enzyme activation, and crop quality. Farmers are increasingly incorporating secondary macronutrients into fertilization programs to correct nutrient deficiencies and maximize yields. According to the Food and Agriculture Organization (FAO, 2024), balanced nutrient management is fundamental to improving agricultural productivity while maintaining long-term soil health and sustainability.

Expansion of Precision Agriculture and Sustainable Farming Practices: The rapid adoption of precision farming technologies, including soil testing, remote sensing, GPS-guided equipment, and fertigation systems, is supporting efficient application of secondary macronutrients. These technologies improve nutrient-use efficiency, minimize fertilizer losses, optimize crop performance, and reduce environmental impacts, encouraging broader adoption across commercial agriculture.

Growing Cultivation of High-Value Crops: Increasing production of fruits, vegetables, oilseeds, and specialty crops is driving demand for calcium-, magnesium-, and sulfur-based fertilizers. High-value crops require balanced nutrient availability to improve fruit quality, shelf life, disease resistance, and overall market value, creating sustained demand for specialty nutrient formulations.

Advancements in Specialty Fertilizer Technologies: Continuous innovation in controlled-release fertilizers, water-soluble formulations, customized nutrient blends, and enhanced-efficiency fertilizers is improving nutrient availability and crop uptake. These technological advancements enable growers to optimize fertilizer application while increasing productivity and supporting sustainable agricultural practices.

Fluctuating Raw Material Prices and Supply Chain Challenges: The production of secondary macronutrient fertilizers depends on the availability of minerals and chemical feedstocks such as gypsum, limestone, dolomite, sulfur, and magnesium compounds. Price volatility, mining disruptions, transportation costs, and geopolitical uncertainties can increase production expenses and affect the stability of fertilizer supply chains.

Environmental Regulations and Fertilizer Application Restrictions: Increasing environmental regulations aimed at reducing nutrient runoff, protecting water resources, and lowering greenhouse gas emissions are influencing fertilizer manufacturing and application practices. Compliance with evolving regulatory requirements may increase operational costs for manufacturers while requiring continued investment in environmentally sustainable fertilizer technologies.

Opportunity Mapping Based on Market Trends

Expansion of Precision Agriculture and Fertigation Systems: Increasing adoption of precision farming technologies, drip irrigation, and fertigation is creating significant opportunities for secondary macronutrient manufacturers. Water-soluble calcium, magnesium, and sulfur formulations designed for precision nutrient delivery enable higher fertilizer-use efficiency, improved crop performance, and optimized resource utilization, supporting greater adoption among commercial growers.

Growing Demand for Specialty Fertilizers in High-Value Crops: Rising cultivation of fruits, vegetables, horticultural crops, and plantation crops is generating strong demand for specialized secondary macronutrient products. Manufacturers developing crop-specific nutrient formulations that enhance fruit quality, improve shelf life, increase stress tolerance, and boost marketable yields are expected to benefit from expanding premium agriculture markets.

Development of Sustainable and Enhanced-Efficiency Fertilizers: Continuous innovation in controlled-release fertilizers, environmentally friendly nutrient formulations, bio-based fertilizers, and nutrient stabilization technologies is creating new growth opportunities. Companies investing in sustainable fertilizer solutions that reduce nutrient losses, improve soil health, and comply with increasingly stringent environmental regulations are expected to strengthen their competitive position.

Agricultural Expansion Across Emerging Economies: Rapid modernization of agriculture across Asia Pacific, Latin America, Africa, and parts of the Middle East is creating favorable conditions for increased secondary macronutrient consumption. Government initiatives supporting balanced fertilization, increasing mechanization, expansion of irrigated agriculture, and rising awareness of soil nutrient management are expected to accelerate market growth and create long-term investment opportunities in emerging agricultural economies.

Value-Creating Segments and Growth Pockets

By Nutrient Type, the Global Secondary Macronutrients Market is segmented into Calcium, Magnesium, and Sulfur.

Sulfur is expected to dominate the market, accounting for an estimated 45.3% share in 2025. The segment's leadership is driven by its essential role in protein synthesis, chlorophyll formation, nitrogen utilization, and oil production in crops. Increasing sulfur deficiencies in agricultural soils due to intensive cultivation and reduced atmospheric

sulfur deposition are encouraging farmers to adopt sulfur-based fertilizers to maintain crop productivity and quality.

Calcium is projected to register the fastest CAGR of 4.7% during 2026–2036, fueled by growing demand for improved fruit firmness, enhanced shelf life, stronger plant cell walls, and greater resistance to physiological disorders. Rising cultivation of high-value horticultural crops and increasing adoption of precision nutrient management are expected to support robust demand for calcium fertilizers.

By Crop Type, the Global Secondary Macronutrients Market is segmented into Cereals & Grains, Oilseeds & Pulses, Fruits & Vegetables, and Others.

Cereals & Grains are expected to dominate the market, accounting for an estimated 47.6% share in 2025. The segment's leadership is supported by the extensive cultivation of staple crops such as wheat, rice, maize, and barley, which require balanced nutrient management to sustain high yields and improve grain quality. Large cultivation areas and increasing fertilizer application rates continue to reinforce the segment's dominant position.

Fruits & Vegetables are projected to register the fastest CAGR of 4.9% during 2026–2036, driven by increasing consumer demand for premium-quality produce, expanding commercial horticulture, and greater adoption of calcium- and magnesium-rich fertilizer programs to improve crop quality, shelf life, and resistance to physiological disorders.

By Form, the Global Secondary Macronutrients Market is segmented into Dry and Liquid.

Dry is expected to dominate the market, accounting for an estimated 66.4% share in 2025. The segment's leadership is attributed to its longer shelf life, lower storage and transportation costs, ease of bulk handling, and widespread use in conventional agricultural practices. Dry fertilizers remain the preferred choice for large-scale field crop cultivation due to their cost-effectiveness and compatibility with existing fertilizer application equipment.

Liquid is projected to register the fastest CAGR of 4.8% during 2026–2036, supported by increasing adoption of precision agriculture, fertigation systems, and foliar nutrient applications. Superior nutrient availability, rapid plant uptake, and compatibility with modern irrigation technologies continue to accelerate demand for liquid formulations.

By Mode of Application, the Global Secondary Macronutrients Market is segmented into Soil Application, Foliar Application, and Fertigation.

Soil Application is expected to dominate the market, accounting for an estimated 58.7% share in 2025. The segment's leadership is driven by its widespread adoption across conventional farming systems, ability to supply nutrients directly to the root zone, and effectiveness in correcting long-term soil nutrient deficiencies. Soil application remains the primary method for large-scale agricultural production worldwide.

Fertigation is projected to register the fastest CAGR of 5.2% during 2026–2036, fueled by expanding drip irrigation infrastructure, increasing water-use efficiency initiatives, and rising adoption of precision farming practices. Fertigation enables accurate nutrient delivery, minimizes fertilizer losses, improves nutrient uptake, and enhances crop productivity, making it an increasingly preferred application method for commercial agriculture.

Regional Market Assessment

Asia Pacific

Asia Pacific is expected to dominate the global secondary macronutrients market, accounting for an estimated 41.8% share in 2025. The region's leadership is driven by its vast agricultural land, high fertilizer consumption, expanding cultivation of cereals, rice, fruits, and vegetables, and increasing government initiatives promoting balanced nutrient management. China and India remain the largest consumers of agricultural fertilizers due to their large farming sectors and growing emphasis on improving crop productivity and soil health. According to the Food and Agriculture Organization (FAO, 2024), Asia continues to account for a substantial share of global agricultural production, reinforcing demand for balanced fertilization and efficient nutrient management. Rising adoption of precision agriculture, fertigation systems, and specialty fertilizers further strengthens the region's market leadership.

North America

North America represents a significant market for secondary macronutrients, supported by widespread adoption of precision agriculture, advanced irrigation infrastructure, and increasing demand for sustainable farming practices. The United States and Canada are investing in soil testing, variable-rate fertilizer application, and enhanced-efficiency

fertilizer technologies to improve nutrient-use efficiency while maintaining high crop yields. Growing cultivation of corn, soybeans, wheat, and specialty crops continues to support regional demand.

Europe

Europe maintains a strong position in the secondary macronutrients market owing to stringent environmental regulations, advanced agricultural practices, and increasing focus on sustainable nutrient management. Countries including Germany, France, Spain, Italy, and the Netherlands continue to adopt specialty fertilizers, precision nutrient application technologies, and integrated soil fertility management programs to improve agricultural productivity while minimizing environmental impact.

LAMEA

LAMEA is projected to register the fastest CAGR of 4.8% during 2026–2036, driven by expanding commercial agriculture, increasing cultivation of export-oriented crops, improving irrigation infrastructure, and rising awareness of balanced crop nutrition across Latin America, the Middle East, and Africa. Countries such as Brazil, Argentina, South Africa, Saudi Arabia, and the United Arab Emirates are investing in fertilizer modernization, soil fertility improvement, and sustainable farming practices to support agricultural productivity and food security.

Recent Developments

May 2025: BASF SE expanded its portfolio of specialty crop nutrition solutions by introducing advanced nutrient formulations designed to improve calcium, magnesium, and sulfur availability while enhancing nutrient-use efficiency in commercial agriculture.

March 2025: Nutrien Ltd. strengthened its precision agriculture platform through expanded digital nutrient management solutions that help growers optimize fertilizer application and improve crop productivity.

October 2024: Yara International ASA introduced new sulfur-enriched fertilizer formulations developed to address increasing sulfur deficiencies in agricultural soils while supporting sustainable crop production.

July 2024: ICL Group Ltd. expanded production capacity for specialty fertilizers

and water-soluble crop nutrition products to meet growing global demand for precision agriculture and fertigation applications.

Critical Business Questions Addressed

How will the Global Secondary Macronutrients Market evolve through 2036?

The report evaluates long-term market growth, precision agriculture adoption, balanced nutrient management, fertilizer innovation, and sustainable farming practices shaping future demand for secondary macronutrients.

Which nutrient type, crop type, form, and application method segments will generate the greatest commercial opportunities?

The study identifies the dominant and fastest-growing market segments, enabling fertilizer manufacturers, agricultural input suppliers, distributors, and investors to prioritize strategic investments.

What are the primary factors driving market expansion?

The report analyzes the influence of global food demand, soil nutrient depletion, high-value crop cultivation, precision farming, and specialty fertilizer technologies on future market development.

Which regional markets present the strongest long-term investment potential?

The assessment compares fertilizer consumption, crop production, irrigation infrastructure, precision agriculture adoption, and government agricultural policies across major regions to identify the most attractive growth opportunities.

How can secondary macronutrient manufacturers strengthen their competitive position in the evolving industry?

The report examines strategic priorities including specialty fertilizer development, controlled-release technologies, digital agriculture integration, sustainable nutrient management, research and development investments, and strategic partnerships to support long-term competitive advantage.

Beyond the Forecast

The secondary macronutrients market will increasingly benefit from advances in precision agriculture, digital farming platforms, controlled-release fertilizers, and water-soluble nutrient technologies, enabling growers to improve nutrient-use efficiency, crop quality, and environmental sustainability.

Rising global demand for food, increasing cultivation of high-value crops, and growing awareness of balanced soil nutrition will continue to expand opportunities for calcium-, magnesium-, and sulfur-based fertilizer solutions across commercial agriculture.

As governments and agricultural producers intensify their focus on sustainable farming, soil health restoration, and climate-resilient crop production, companies investing in specialty fertilizer innovation, precision nutrient delivery systems, and environmentally responsible manufacturing will be well positioned to capitalize on long-term growth opportunities in the global secondary macronutrients market through 2036.

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