

Secondary Macronutrients Market Forecasts to 2032 – Global Analysis By Product Type (Straight Fertilizers, Specialty Blends, Compound Fertilizers, and Other Product Types), Nutrient Type, Crop Type, Formulation, Application Mode, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Secondary Macronutrients Market is accounted for \$45.97 billion in 2025 and is expected to reach \$69.12 billion by 2032 growing at a CAGR of 6.0% during the forecast period. Secondary macronutrients are crucial nutrients needed by plants in moderate levels to ensure proper growth and productivity. This group consists of calcium (Ca), magnesium (Mg), and sulfur (S), which contributes to structural integrity, energy production, and metabolic processes. Though required in lesser amounts than nitrogen, phosphorus, and potassium, these nutrients remain essential for sustaining soil health, improving crop yields, and enhancing plants' resilience against adverse conditions and environmental challenges

Market Dynamics:

Driver:

Growing awareness about soil fertility management

The increasing emphasis on soil health is propelling demand for secondary macronutrients such as calcium, magnesium, and sulfur. These nutrients play a vital role in enhancing nutrient uptake, improving crop resilience, and optimizing pH balance in soils. Farmers and agronomists are recognizing their importance in boosting yields

and maintaining long-term soil productivity. Technological innovations in soil testing and precision agriculture are making nutrient management more targeted and efficient. Emerging trends include AI-driven nutrient mapping and smart fertilizer application systems. As sustainable farming gains traction, awareness around balanced nutrient profiles is becoming central to agronomic strategies.

Restraint:

Limited awareness among small-scale farmers

Limited access to agronomic education and extension services hinders adoption in rural and underserved regions. Cost sensitivity and reliance on traditional practices further slow market penetration. Emerging technologies such as mobile-based advisory platforms and community-led training programs are attempting to bridge this gap. However, uptake remains uneven, and localized outreach remains a key challenge. Without broader awareness and support, the full potential of these nutrients may remain untapped in critical farming communities.

Opportunity:

Rising organic farming and sustainable agriculture practices

The global shift toward organic and regenerative agriculture is creating strong tailwinds for secondary macronutrients. These nutrients are essential for maintaining soil vitality without relying on synthetic inputs. As consumers demand cleaner food and governments incentivize sustainable practices, organic growers are increasingly turning to natural sources of calcium, magnesium, and sulfur. Innovations in bio-based fertilizers and microbial formulations are enhancing nutrient availability in eco-friendly ways. Key developments include slow-release granules and foliar sprays tailored for organic systems. This trend is opening new market avenues, especially in premium crop segments and export-oriented agriculture.

Threat:

Volatility in raw material availability and prices

Fluctuations in the cost and availability of raw materials used in secondary macronutrient production pose a significant risk to market stability. Supply chain disruptions, geopolitical tensions, and currency shifts can impact the sourcing of

minerals like gypsum, dolomite, and kieserite. These price swings affect manufacturing margins and can lead to inconsistent product availability. Emerging trends in circular agriculture and mineral recovery from industrial by-products offer partial mitigation. However, smaller producers may struggle to absorb cost shocks, leading to competitive imbalances.

Covid-19 Impact

The pandemic initially disrupted the secondary macronutrients market due to lockdowns, labor shortages, and logistical bottlenecks. Fertilizer distribution networks were strained, and on-ground advisory services were limited. However, the crisis underscored the importance of resilient food systems and soil health, prompting renewed investment in nutrient management. Digital platforms for agronomic support and remote diagnostics gained traction during this period. As economies recover, the market is rebounding with a stronger focus on sustainability and supply chain agility.

The straight fertilizers segment is expected to be the largest during the forecast period

The straight fertilizers segment is expected to account for the largest market share during the forecast period, due to their targeted nutrient delivery and cost-effectiveness. These formulations allow farmers to address specific deficiencies without overloading the soil with unnecessary compounds. Their simplicity and compatibility with existing farming practices make them a preferred choice across crop types. Emerging technologies include nano-formulated straight fertilizers and precision dosing systems. Manufacturers are focusing on enhancing solubility and shelf life to improve field performance.

The greenhouse growers segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the greenhouse growers segment is predicted to witness the highest growth rate, due to their controlled environment and high-value crop focus. These growers require precise nutrient management to optimize plant health and maximize yields. Secondary macronutrients play a critical role in preventing physiological disorders and enhancing flowering and fruiting. Innovations such as hydroponic-compatible formulations and automated fertigation systems are driving uptake. Key developments include sensor-based nutrient monitoring and AI-powered growth optimization tools. As greenhouse farming expands globally, especially in urban and arid regions, demand for tailored nutrient inputs will surge.

Region with largest share:

During the forecast period, the Asia Pacific region is expected to hold the largest market share driven by its vast agricultural footprint and rising food demand. Countries like India and China are investing heavily in crop productivity and soil health initiatives. Government subsidies and awareness campaigns are promoting balanced fertilization practices. Technological adoption is accelerating, with precision farming and drone-based nutrient application gaining ground. Key developments include region-specific formulations and mobile advisory platforms in local languages.

Region with highest CAGR:

Over the forecast period, the North America region is anticipated to exhibit the highest CAGR, fuelled by advanced farming technologies and sustainability mandates. Farmers in the region are increasingly adopting data-driven nutrient management and environmentally friendly inputs. The rise of organic farming and regenerative agriculture is boosting demand for calcium, magnesium, and sulfur-based products. Innovations such as IoT-enabled soil sensors and AI-based nutrient modeling are reshaping application strategies. Key developments include partnerships between agtech firms and fertilizer producers to deliver integrated solutions.

Key players in the market

Some of the key players profiled in the Secondary Macronutrients Market include Nutrien Ltd., Sumitomo Chemical Co., Ltd., Yara International ASA, EuroChem Group AG, The Mosaic Company, OCI N.V., Israel Chemicals Ltd. (ICL), Haifa Group, K+S Aktiengesellschaft, Nufarm Limited, Koch Industries, Inc., Van Iperen International B.V., Compass Minerals International, Inc., Society for the Promotion of Indian Culture (SPIC), and Coromandel International Ltd.

Key Developments:

In June 2025, Sumitomo Chemical has launched a new digital transformation (DX) management structure. The Company will reform its organization and systems for DX strategy planning and execution and accelerate initiatives under the new policy of DX NEXT empowered by AI set out in its Corporate Business Plan for fiscal 2025 to 2027.

In January 2025, The Mosaic Company and Fosfatados Centro SPE Ltda announced

that they have entered into an agreement for the sale of a phosphate asset owned by Mosaic located in Patos de Minas, Brazil. Upon the closing of the transaction, Fosfatados Centro will assume responsibility for the Patos de Minas mine and tailings dams and pay Mosaic \$125 million (USD) in cash over six years.

Product Types Covered:

Straight Fertilizers

Specialty Blends

Compound Fertilizers

Other Product Types

Nutrient Types Covered:

Calcium (Ca)

Sulfur (S)

Magnesium (Mg)

Crop Types Covered:

Field Crops

Horticultural Crops

Turf & Ornamentals

Plantation Crops

Formulations Covered:

Liquid

Granular

Powder

Application Modes Covered:

Soil Application

Fertigation

Foliar Spray

End Users Covered:

Commercial Agriculture

Turf Management

Smallholder Farms

Greenhouse Growers

Other End Users

Regions Covered:

North America

US

Canada

Mexico

Europe

Germany

UK

Italy

France

Spain

Rest of Europe

Asia Pacific

Japan

China

India

Australia

New Zealand

South Korea

Rest of Asia Pacific

South America

Argentina

Brazil

Chile

Rest of South America

Middle East & Africa

Saudi Arabia

UAE

Qatar

South Africa

Rest of Middle East & Africa

What our report offers:

- Market share assessments for the regional and country-level segments
- Strategic recommendations for the new entrants
- Covers Market data for the years 2024, 2025, 2026, 2028, and 2032
- Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)
- Strategic recommendations in key business segments based on the market estimations
- Competitive landscaping mapping the key common trends
- Company profiling with detailed strategies, financials, and recent developments
- Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as

per the client's interest (Note: Depends on feasibility check)

Competitive Benchmarking

Benchmarking of key players based on product portfolio, geographical presence, and strategic alliances

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