

# **Agricultural Micronutrients Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Type (Zinc, Boron, Iron, Copper, Manganese, Molybdenum, Others), By Crop Type (Cereals & Grains, Fruits & Vegetables, Oilseeds & Pulses, others), By Form (Non-chelated Micronutrients, Chelated Micronutrients), By Mode of Application (Soil Treatment, Foliar Spray, Fertigation, Seed Treatment, others), By Region and Competition, 2019-2029F**

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## **Abstracts**

Global Agricultural Micronutrients Market was valued at USD 4.43 Billion in 2023 and anticipated to experience an steady growth in the forecast period at a CAGR of 8.73% through 2029. Agricultural micronutrients are essential elements needed by plants in small quantities for healthy growth and development. While macronutrients like nitrogen, phosphorus, and potassium are required in larger amounts, micronutrients play a crucial role in various plant functions, influencing everything from photosynthesis and nutrient uptake to disease resistance and crop quality. Essential Micronutrients are elements that plants cannot synthesize themselves and must be obtained from the soil. Some common examples include boron (B), chlorine (Cl), copper (Cu), iron (Fe), manganese (Mn), molybdenum (Mo), nickel (Ni), and zinc (Zn). Beneficial Micronutrients are elements that are not always considered essential but can still positively impact plant growth and development under certain conditions. Examples include cobalt (Co) and sodium (Na). Many micronutrients act as co-factors for enzymes, which are essential for carrying out various biochemical processes in plants.

Certain micronutrients like iron and magnesium are vital for chlorophyll production and proper functioning of photosynthetic machinery. Micronutrients can enhance plant resistance to environmental stresses like drought, heat, and diseases. Adequate micronutrient levels can improve fruit set, taste, nutritional value, and shelf life of crops.

Increased consumer awareness about health and nutrition has led to a demand for foods rich in essential micronutrients. Applying micronutrients during crop cultivation can enhance the nutritional content of food, promoting better health outcomes. Decades of intensive farming practices have caused widespread soil degradation and depletion of essential micronutrients. This necessitates the use of micronutrients to replenish the soil and ensure efficient nutrient uptake by crops. Advancements in precision agriculture, including soil testing and targeted application techniques, are leading to a more efficient and effective use of micronutrients. This optimizes nutrient use, reduces waste, and maximizes returns for farmers. Growing concerns about environmental sustainability and the negative impacts of excessive chemical fertilizer use are driving the adoption of sustainable farming practices. Micronutrients can contribute to sustainable agriculture by promoting soil health and reducing reliance on harmful chemicals. Many governments are recognizing the importance of micronutrients in crop production and food security. They are implementing various initiatives and providing financial support to encourage farmers to adopt micronutrient use.

## Key Market Drivers

### Rising Focus on Nutrient-Rich Food

Consumers are becoming increasingly aware of the vital role that micronutrients play in maintaining good health and preventing chronic diseases. This has led to a shift towards diets rich in fruits, vegetables, and whole grains, which are naturally abundant in these essential elements. Micronutrient deficiencies, also known as hidden hunger, affect billions of people globally, even in regions with adequate calorie intake. Fortifying staple crops with essential micronutrients through agricultural practices is a cost-effective and sustainable way to address this hidden health burden. Biofortification programs that focus on breeding crops naturally rich in specific micronutrients are gaining traction. This not only improves the nutritional value of food but also makes it more accessible to vulnerable populations who rely heavily on these staple crops. Many governments are recognizing the importance of micronutrient-rich food for improved public health and development. They are

implementing policies and initiatives that incentivize farmers to adopt micronutrient-based agricultural practices and promote the consumption of biofortified foods.

Growing urbanization and busy lifestyles are leading to shifts in dietary patterns towards processed and ready-to-eat foods that are often low in essential micronutrients. This further emphasizes the need for enriching staple crops through micronutrient application. Consumers are increasingly concerned about the ethical and sustainable sourcing of their food. Micronutrient use can contribute to sustainable agriculture by promoting soil health, reducing reliance on chemical fertilizers, and minimizing environmental impact. Innovations in precision agriculture, such as soil testing and targeted application techniques, allow for more efficient and effective use of micronutrients. This ensures the right nutrients are applied in the right amounts, optimizing plant growth, and maximizing yields. This factor will help in the development of the Global Agricultural Micronutrients Market.

### Increasing Demand for Specific Micronutrients

Different crops have unique micronutrient requirements based on their physiology, genetic makeup, and growing conditions. For example, maize in Africa might require additional zinc, while fruits in temperate regions might benefit from increased boron levels. This creates a diverse demand for tailored micronutrient solutions. Regional soil variations lead to specific deficiencies of certain micronutrients. For instance, soils in Southeast Asia often lack molybdenum, while those in South America might be deficient in iron. Addressing these regional deficiencies requires targeted application of the specific micronutrients needed.

Environmental conditions like climate change and soil erosion can exacerbate existing micronutrient deficiencies. This necessitates adjustments in micronutrient use depending on the specific challenges faced in different regions and seasons. The rise of niche market segments like organic farming and high-value crops creates additional demand for specialized micronutrient products. Organic agriculture often faces unique challenges in maintaining soil health and plant nutrition, requiring specific forms of organic-compatible micronutrients. Similarly, high-value crops, such as berries or medicinal plants, have stringent quality requirements that can be enhanced through targeted micronutrient application.

Advancements in soil testing and analysis allow for precise identification of specific micronutrient deficiencies in individual fields. This enables farmers to apply only the required micronutrients, optimize resource utilization, and achieve better results. The

Integration of micronutrient use into precision agriculture strategies allows for targeted application based on site-specific needs. This reduces waste, minimizes environmental impact, and maximizes profitability for farmers. Ongoing research and development efforts are leading to the creation of new and improved micronutrient formulations with enhanced efficiency, stability, and release characteristics. These advancements cater to the specific needs of different crops and soil conditions, further driving market growth. This factor will pace up the demand of the Global Agricultural Micronutrients Market.

### Growth in Soil Degradation and Deficiencies

Over decades of intensive farming practices, essential micronutrients have been depleted from the soil. Wind and water can wash away topsoil, which is rich in organic matter and micronutrients. Excessive watering, or rainfall can cause valuable micronutrients to seep deeper into the soil, out of reach of plant roots. When crops are harvested, they take up micronutrients from the soil, which need to be replenished for future crops. Plants lacking essential micronutrients struggle to grow and produce optimally, leading to lower yields. Micronutrient deficiencies can affect the appearance, taste, and nutritional value of crops. Stressed plants due to micronutrient deficiencies are more vulnerable to diseases and pests.

Micronutrients provide essential elements that plants need for healthy growth and development. Micronutrients enhance the appearance, taste, and nutritional value of crops. Adequate micronutrient levels help plants reach their full potential, leading to higher yields. Plants with optimal micronutrient levels are better able to withstand stress from diseases, pests, and environmental factors. As the global population grows and the demand for food increases, soil degradation and micronutrient deficiencies are expected to worsen. This highlights the crucial role of agricultural micronutrients in ensuring sustainable food production and food security. Continued research and development of efficient and targeted micronutrient application methods will be essential to meet this growing challenge. By addressing soil degradation and deficiencies using agricultural micronutrients, we can ensure healthy and productive crops, nutritious food for all, and a more sustainable future for agriculture. This factor will accelerate the demand of the Global Agricultural Micronutrients Market.

### Key Market Challenges

#### Sustainable Sourcing of Raw Materials

Mining for raw materials used in micronutrients, like zinc and boron, can have negative environmental impacts like deforestation, water pollution, and air quality degradation. Sustainable sourcing practices aim to minimize these environmental footprints. Many of the raw materials used in micronutrients are finite resources, and unsustainable extraction rates can lead to depletion in the future. Sustainable sourcing ensures responsible use of these resources for long-term availability. Labor exploitation and unfair trade practices can be associated with traditional sourcing methods. Sustainable sourcing prioritizes ethical and fair treatment of workers throughout the supply chain.

Implementing sustainable practices often involves additional costs, making it challenging for some manufacturers to compete with those using cheaper, but less sustainable methods. Tracing the origins of raw materials and ensuring ethical and sustainable practices across complex supply chains can be difficult. The availability of certified sustainably sourced raw materials may not yet meet the demand in all regions, creating bottlenecks and challenges for manufacturers. Independent certification programs like the Responsible Minerals Initiative (RMI) are verifying and promoting responsible sourcing practices throughout the industry. Collaboration between stakeholders, including miners, manufacturers, NGOs, and governments, is crucial for developing and implementing effective sustainable sourcing solutions.

### Economic and Logistical Hurdles

Micronutrients often require specialized formulations and application methods, making them more expensive than traditional bulk fertilizers. This can be a barrier for small-scale farmers who may not have the same financial resources as larger farms. Small-scale farmers and those in developing countries might lack access to loans or subsidies to purchase and utilize micronutrients, hindering their adoption. Prices of raw materials for micronutrients can fluctuate based on global market conditions, creating uncertainty for farmers, and impacting their ability to budget for these inputs. Limited awareness among farmers about the benefits and proper use of micronutrients can hinder their adoption, even if resources are available. Reaching small-scale farmers in remote areas with micronutrients can be challenging due to fragmented distribution networks and inadequate infrastructure.

Certain micronutrients have specific storage and transportation needs, adding to the complexity and cost of logistics. Trained personnel familiar with micronutrient application techniques may not be readily available in all regions, making it difficult for farmers to implement them effectively. Poor transportation infrastructure and lack of storage facilities in certain regions can further hinder the distribution and availability of

micronutrients. Governments can provide subsidies, training programs, and improved infrastructure to make micronutrients more accessible and affordable for small-scale farmers. Collaboration between private companies, NGOs, and research institutions can develop innovative solutions, improve distribution networks, and raise awareness about the benefits of micronutrients.

## Key Market Trends

### Rise of Bio-Based and Organic Micronutrients

Consumers are increasingly seeking organic food due to concerns about the health and environmental impacts of conventional agriculture. This has led to a surge in demand for organic fertilizers and micronutrients, including bio-based alternatives. Traditional micronutrients often rely on non-renewable resources and can have negative environmental consequences. Bio-based and organic micronutrients offer a more sustainable alternative, sourced from renewable resources and minimizing environmental impact. Advancements in bio-based and organic micronutrient formulations have yielded products with comparable or even superior performance to traditional options. This enhanced efficacy further bolsters their appeal to farmers. Some countries are implementing regulations encouraging or even mandating the use of organic fertilizers and micronutrients. This regulatory push creates additional momentum for the growth of this segment. Bio-based and organic micronutrients enhance soil fertility, microbial activity, and organic matter content, leading to healthier soils and long-term productivity. These products minimize emissions, leaching, and water pollution while promoting carbon sequestration, contributing to a more sustainable agricultural ecosystem. Bio-based and organic micronutrients can improve crop quality by boosting nutrient uptake, enhancing taste, and increasing resistance to diseases and pests.

### Shifting Focus Towards Precision Agriculture

Precision agriculture techniques allow for targeted application of micronutrients based on specific soil needs and crop requirements, minimizing waste and optimizing resource utilization. By addressing precise deficiencies, farmers can achieve higher yields and improve overall crop production. Targeted micronutrient application can lead to better tasting, more visually appealing, and more nutritious crops. Precision agriculture minimizes unnecessary fertilizer use and pollution, contributing to a more sustainable agricultural system. These techniques provide detailed information about soil nutrient levels and distribution, enabling farmers to identify areas requiring

specific micronutrients. Specialized equipment helps apply micronutrients at varying rates across fields, ensuring each zone receives the optimal amount it needs. Advanced software analyzes soil test data and other variables to generate customized fertilizer recommendations and application maps.

## Segmental Insights

### Crop Type Insights

Based on crop type, the Cereals & Grains segment is projected to experience rapid growth in the Agricultural Micronutrients market during the forecast period. Cereals and grains, including wheat, rice, maize, and barley, constitute the foundation of global food security. They provide the primary source of calories and nutrients for a significant portion of the world's population. Optimizing their quality and yield through micronutrient application becomes crucial for addressing food security concerns. Cereals and grains cover vast agricultural land and boast immense production volumes compared to other crop types. This large cultivation area translates to a substantial demand for micronutrients to maintain soil fertility and optimize yields across vast farming landscapes.

Growing consumer awareness of health and nutrition is driving a shift towards fortified cereals and grains richer in essential micronutrients. Micronutrient application plays a vital role in enhancing the nutritional value of these staple foods, addressing hidden hunger and micronutrient deficiencies in populations reliant on them. Developments in cereal and grain breeding programs focus on producing high-yielding and resilient varieties. However, these new cultivars often have increased micronutrient requirements to sustain their superior performance. Targeted micronutrient application ensures these varieties reach their full potential and deliver optimal harvests. Cereals and grains are often cultivated on large-scale farms with established distribution channels and infrastructure for fertilizer application. This makes using micronutrients in this segment relatively cost-effective compared to other crops, further facilitating adoption and market growth.

### Mode of Application Insights

Based on mode of application, the Soil Treatment segment is projected to experience rapid growth in the Global Agricultural Micronutrients Market during the forecast period. There's a growing understanding of the crucial role soil health plays in overall crop health and productivity. Micronutrients applied directly to the soil can

improve its fertility, structure, and microbial activity, leading to better nutrient uptake by plants and ultimately, higher yields. Soil naturally loses essential micronutrients over time due to factors like erosion, leaching, and crop removal. Applying micronutrients directly to the soil helps replenish these deficiencies and ensures plants have access to the necessary elements for optimal growth.

Soil treatment with micronutrients can be more efficient than traditional foliar application methods. Foliar sprays can be easily washed away by rain or blown off by wind, while soil application ensures long-lasting availability of nutrients for plant uptake. Advancements in precision agriculture techniques like soil testing and mapping allow for targeted application of micronutrients only where they are needed. This reduces waste and optimizes nutrient use, leading to cost savings for farmers. Soil treatment with micronutrients can contribute to sustainable agricultural practices by promoting soil health and reducing the need for chemical fertilizers. This aligns with the growing demand for environmentally friendly farming methods.

## Regional Insights

Based on region, North America emerged as the dominant region in the Global Agricultural Micronutrients Market in 2023. North America boasts a large and well-developed agricultural sector, with countries like the United States and Canada being major producers of crops like corn, soybeans, wheat, and fruits. This strong agricultural base translates to a high demand for micronutrients to optimize crop yields and quality. North American farmers are known for their adoption of advanced farming technologies and practices, such as precision agriculture and soil testing. These techniques help identify and address specific micronutrient deficiencies in the soil, leading to more targeted and efficient use of micronutrients. There is a growing awareness in North America about the importance of sustainable farming practices, which includes the responsible use of fertilizers and micronutrients. This has led to an increased demand for micronutrient products that are derived from natural sources and have minimal environmental impact.

## Key Market Players

Aries Agricultural Limited

BASF SE

BMS Micro-Nutrients NV



Haifa Negev Technologies Ltd.

Helena Agri-Enterprises, LLC

Koch Industries, Inc.

Nouryon Holdings BV

Nufarm Limited

### Report Scope:

In this report, the Global Agricultural Micronutrients Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

#### Agricultural Micronutrients Market, By Type:

Zinc

Boron

Iron

Copper

Manganese

Molybdenum

Others

#### Agricultural Micronutrients Market, By Crop Type:

Cereals & Grains

Fruits & Vegetables

Oilseeds & Pulses

Others

Agricultural Micronutrients Market, By Form:

Non-chelated Micronutrients

Chelated Micronutrients

Agricultural Micronutrients Market, By Mode of Application:

Soil Treatment

Foliar Spray

Fertigation

Seed Treatment

Others

Agricultural Micronutrients Market, By Region:

North America

United States

Canada

Mexico

Europe

Germany

United Kingdom

France

Italy

Spain

Asia Pacific

China

Japan

India

Australia

South Korea

South America

Brazil

Argentina

Colombia

Middle East & Africa

South Africa

Saudi Arabia

UAE

## Competitive Landscape

Company Profiles: Detailed analysis of the major companies presents in the Global Agricultural Micronutrients Market.

### Available Customizations:

Global Agricultural Micronutrients Market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

#### Company Information

Detailed analysis and profiling of additional market players (up to five).

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