

# Chelated Iron Agricultural Micronutrient Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Application (Cereals, Fruits & vegetables, Pulses & Oilseeds and Others), By Region and Competition, 2019-2029F

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## Abstracts

Global Chelated Iron Agricultural Micronutrient Market was valued at USD 47.94 Million in 2023 and is anticipated to project impressive growth in the forecast period with a CAGR of 3.84% through 2029. The Global Chelated Iron Agricultural Micronutrient Market is driven primarily by the increasing demand for high-quality crops and the need to address iron deficiency in soil. As global agriculture intensifies to meet the growing food demand, farmers seek effective solutions to enhance crop health and yield. Chelated iron, a highly bioavailable form of iron, helps correct iron deficiencies in soils, improving plant growth and productivity. This is crucial for optimizing crop performance and ensuring high yields. The rising adoption of precision agriculture and advanced fertilization techniques boosts the demand for chelated iron as part of integrated nutrient management. Environmental sustainability concerns and the need for efficient nutrient utilization further drive market growth. The focus on enhancing soil fertility and crop resilience to meet global food security needs propels the Chelated Iron Agricultural Micronutrient market forward.

### Key Market Drivers

#### Increasing Global Food Demand

The rapid increase in global food demand, driven by a growing population and shifting dietary patterns, is a significant catalyst for the expansion of the chelated iron agricultural micronutrient market. As the world's population continues to rise,

especially in developing nations, the pressure on agricultural systems to produce sufficient food to ensure global food security intensifies. This demand surge is further compounded by changing dietary preferences, which often include a higher consumption of nutrient-dense foods requiring increased agricultural output. According to a report titled, “Scenarios of Global Food Consumption: Implications for Agriculture”, the global land base faces mounting pressure to meet the food demands of a growing population. This report examines how rising population, income, and agricultural productivity might influence global crop and food production and consumption by 2050. Findings indicate that, under a scenario driven by increased income, world crop calorie production is projected to rise by 47% from 2011 to 2050. Throughout all scenarios, there is a consistent increase in the demand for food and crop calories, primarily met through enhanced crop yields (intensification). While the total cropland area also expands (extensification), this increase is proportionally smaller.

Chelated iron micronutrients are crucial in addressing this burgeoning need for enhanced agricultural productivity. As crops are cultivated in larger volumes to meet food demands, maintaining soil fertility and correcting nutrient deficiencies become essential. Iron, a key micronutrient, plays a pivotal role in several plant processes that directly influence crop health and yield. It is integral to chlorophyll synthesis, which is fundamental for photosynthesis, the process by which plants convert light energy into chemical energy. Without adequate iron, plants cannot efficiently produce chlorophyll, leading to poor growth and reduced crop yields. Chelated iron products offer a solution to the widespread issue of iron deficiency in soils, which can severely limit crop productivity. The chelation process enhances the availability of iron to plants by protecting it from reacting with other soil elements that might render it unavailable. This improved bioavailability ensures that crops receive the necessary nutrients for optimal growth and development. Consequently, the use of chelated iron micronutrients becomes increasingly vital as farmers seek to boost crop yields and maintain soil health amidst rising food production demands.

High-yield crops, which are often promoted to meet food demands, require precise and balanced nutrition to achieve their potential. Chelated iron micronutrients provide a controlled and efficient means of delivering iron to these high-yielding crops, ensuring that they receive the optimal levels of this essential nutrient. This not only enhances crop performance but also helps farmers achieve better economic returns by maximizing the efficiency of their inputs. The drive for improved agricultural productivity is also aligned with broader sustainability goals. As agricultural practices evolve to meet the demands of a growing population, there is an increasing

emphasis on sustainable farming practices that maintain soil health and reduce environmental impact. Chelated iron products contribute to this goal by promoting efficient nutrient use, reducing the need for excessive chemical applications, and minimizing nutrient losses to the environment.

### Soil Degradation and Iron Deficiency

Soil degradation and iron deficiency are pressing challenges impacting crop productivity on a global scale, driving the demand for chelated iron micronutrients. Intensive farming practices, including excessive use of chemical fertilizers, erosion, and improper soil management, have progressively led to nutrient imbalances and a decline in soil fertility. This degradation results in the loss of essential nutrients, including iron, which is crucial for healthy plant growth and development.

Iron deficiency in soil is particularly detrimental to crops. Iron is a vital micronutrient necessary for numerous plant functions, including chlorophyll synthesis, which is essential for photosynthesis. Without adequate iron, plants exhibit symptoms such as chlorosis, where leaves turn yellow while veins remain green, indicative of poor chlorophyll production. This condition leads to stunted growth, reduced crop yields, and diminished quality of produce. In regions where soil is heavily depleted due to continuous cropping and inadequate nutrient replenishment, iron deficiency becomes a widespread issue that exacerbates the challenges faced by farmers. Chelated iron micronutrients address these soil and plant health concerns effectively. Unlike simple iron salts, chelated iron is bound to organic molecules, which protect it from forming insoluble compounds in the soil. This chelation process enhances the stability and solubility of iron, making it more available for plant uptake. As a result, chelated iron provides a highly bioavailable source of this critical nutrient, ensuring that plants can absorb and utilize it efficiently. This not only helps in rectifying iron deficiencies but also in maintaining optimal plant health, thus mitigating the adverse effects of soil degradation.

The use of chelated iron products is especially important in areas with high levels of soil degradation. As soils lose their natural fertility and become less capable of providing essential nutrients to crops, the role of chelated iron becomes increasingly significant. By supplementing the soil with chelated iron, farmers can restore the nutrient balance, improve plant health, and enhance crop productivity. This is crucial for ensuring food security and achieving sustainable agricultural practices. The application of chelated iron helps in optimizing the use of other nutrients and fertilizers. Well-nourished plants are better able to absorb and utilize additional nutrients, leading

more efficient fertilizer use and reducing the need for excessive applications. This contributes to more sustainable farming practices by minimizing nutrient runoff and environmental pollution.

### Advancements in Fertilizer Processing Techniques

Advancements in fertilizer processing and precision agriculture have significantly influenced the growth of the global chelated iron agricultural micronutrient market. The evolution of agricultural practices toward precision farming reflects a broader trend in optimizing resource use, improving crop management, and enhancing overall productivity. Precision agriculture involves the integration of advanced technologies and data-driven methods to manage crops and soil more effectively, which has directly impacted the demand for specialized inputs like chelated iron micronutrients. Modern fertilization techniques prioritize accuracy and efficiency in nutrient application. Traditionally, fertilizers, including micronutrients like iron, were applied uniformly across fields, often leading to over-application in some areas and under-application in others. This not only resulted in inefficient nutrient use but also increased the risk of environmental contamination due to nutrient runoff. Precision agriculture addresses these issues by utilizing technologies that ensure nutrients are applied exactly where and when they are needed.

Chelated iron micronutrients are particularly suited for precision agriculture due to their enhanced stability and bioavailability. Unlike conventional iron sources that may become insoluble and unavailable to plants, chelated iron remains soluble and easily absorbable by plant roots. This characteristic is critical in precision fertilization, where precise control over nutrient availability is essential for optimal plant health and yield.

Technological innovations such as soil sensors, GPS mapping, and variable rate application systems play a crucial role in the precise application of chelated iron. Soil sensors measure nutrient levels and other soil conditions in real-time, providing valuable data that guides the targeted application of fertilizers. GPS mapping allows for accurate field mapping and monitoring, ensuring that nutrient application aligns with crop needs and soil conditions. Variable rate application systems adjust the amount of fertilizer applied based on the data collected, delivering precise quantities of chelated iron to different parts of the field as needed.

### Growing Awareness of Soil Health

The increasing awareness of soil health and its impact on agricultural productivity is a significant driver for the Chelated Iron Agricultural Micronutrient market. Farmers and agricultural professionals are becoming more cognizant of the crucial role that soil health plays in crop performance and sustainability. Healthy soil supports optimal plant growth and productivity, while nutrient deficiencies can lead to poor crop yields and increased susceptibility to pests and diseases. Chelated iron is recognized for its effectiveness in addressing iron deficiencies and improving soil fertility. As awareness of soil health grows, there is a rising demand for chelated iron micronutrients as part of comprehensive soil management strategies. This trend underscores the importance of balanced nutrition and contributes to the expanding market for Chelated Iron Agricultural Micronutrient.

## Key Market Challenges

### Competition from Alternative Micronutrients

Competition from alternative micronutrients and agricultural inputs represents a challenge to the Chelated Iron Agricultural Micronutrient market. While chelated iron offers significant benefits, other micronutrients and soil amendments, such as organic fertilizers and alternative iron formulations, also compete for market share. These alternatives may offer different advantages or be more cost-effective, which can attract farmers and agricultural producers. For instance, organic and bio-based products are gaining popularity due to their perceived environmental benefits and sustainability. The presence of these alternatives can impact the demand for chelated iron products and require manufacturers to differentiate their offerings based on performance, cost, and sustainability. To maintain a competitive edge, chelated iron producers must continuously innovate, emphasize the unique benefits of their products, and address any emerging trends or preferences in the market.

### High Cost of Chelated Iron Products

The high cost of chelated iron agricultural micronutrients presents a significant challenge to the market. Chelated iron products often come with a higher price tag compared to non-chelated alternatives due to the advanced manufacturing processes and specialized technologies involved in their production. This cost disparity can be a barrier for small-scale and resource-constrained farmers, particularly in developing regions where budget constraints are a major concern. Despite the benefits of improved nutrient availability and enhanced crop yields, the initial investment in chelated iron products can be prohibitive for many agricultural operations. The high cost

impacts the adoption rate and market penetration of chelated iron products, as farmers must weigh the economic benefits against the investment required. To address this challenge, there is a need for cost-effective production methods and subsidies or support programs that can make chelated iron products more accessible to a broader range of agricultural producers.

## Key Market Trends

### Rising Adoption of Specialty Crop Farming

The rise in specialty crop farming is a significant driver of the global Chelated Iron Agricultural Micronutrient market, as it underscores the need for targeted nutrient management solutions in high-value agricultural sectors. Specialty crops, including a diverse range of fruits, vegetables, and ornamental plants, are distinguished by their specific growth requirements and often demand precise and tailored nutrient applications to maximize their growth, yield, and quality. This focus on specialty crops is driven by shifting consumer preferences, increased demand for high-quality produce, and emerging market trends that emphasize both nutritional content and aesthetic appeal. Specialty crops are frequently grown for their economic value and are subject to higher market prices compared to conventional staple crops. Fruits like apples, oranges, and berries, vegetables such as tomatoes and peppers, and ornamental plants like roses and orchids, often require optimal conditions for growth to ensure they meet market standards. Chelated iron micronutrients play a crucial role in this context due to their unique ability to address iron deficiencies effectively. Iron is a vital nutrient for plants, playing a key role in chlorophyll production, photosynthesis, and overall plant health. In specialty crops, where visual appeal and nutritional value are critical, ensuring adequate iron availability is essential for achieving high-quality produce. In December 2023, Yara announced its acquisition of Agribios Italiana's organic-based fertilizer business, marking its second bolt-on acquisition as part of its organic growth strategy in Europe. This move underscores Yara's commitment to expanding its portfolio in the organic sector, complementing its mineral fertilizers to advance regenerative agriculture and enhance soil health. By integrating Agribios' expertise in high-quality organic fertilizers with Yara's extensive European network, the company aims to better address the evolving needs of European farmers, irrespective of their farming practices. This acquisition also aligns with the European Union's goal of increasing the area of farmland dedicated to organic farming, furthering Yara's role in supporting this ambition.

Chelated iron offers several advantages over traditional iron sources in specialty crop

farming. Its chelated form maintains solubility in soil, making it more readily available for plant uptake, especially in soils with variable pH levels or high levels of competing ions. This enhanced bioavailability helps overcome common issues associated with iron deficiency, such as chlorosis—a condition where plants exhibit yellowing of leaves due to insufficient chlorophyll production. By addressing these deficiencies promptly and effectively, chelated iron supports the healthy growth and vibrant appearance of specialty crops, which are crucial for meeting consumer expectations and market demands.

### Technological Innovations in Micronutrient Products

Technological innovations in micronutrient products are significantly influencing the global Chelated Iron Agricultural Micronutrient market. Advances in formulation technology have led to the development of new and improved chelated iron products with enhanced stability, solubility, and effectiveness. Innovations such as controlled-release formulations and advanced chelation techniques improve the efficiency and longevity of chelated iron applications. These technological advancements make it possible to address a wider range of soil and crop conditions, offering tailored solutions for various agricultural needs. As technology continues to evolve, the availability of advanced chelated iron products drives market growth by meeting the demands of modern agriculture and enhancing crop performance.

### Segmental Insights

#### Application Insights

Based on the Application, Fruits & Vegetables dominate as the leading category. This dominance is driven by the specific nutrient needs of these crops, the high market value of their produce, and the increasing demand for high-quality, nutritious food products. Fruits & Vegetables require precise nutrient management to achieve optimal growth and quality, which directly influences consumer preferences and market value. Chelated iron is particularly effective in meeting these needs due to its superior bioavailability and efficiency compared to other forms of iron. This micronutrient plays a critical role in preventing and correcting iron deficiency, a common issue in many soils that can lead to symptoms such as chlorosis, where plants exhibit yellowing leaves and reduced chlorophyll production. For fruits and vegetables, which are often highly valued for their appearance and nutritional content, maintaining adequate iron levels is essential for ensuring vibrant color, healthy growth, and high yield. The global trend towards healthier eating and increased consumption of fruits and vegetables has further

amplified the demand for effective nutrient management solutions. Consumers are increasingly seeking fresh, nutrient-dense produce that not only satisfies their taste preferences but also provides essential vitamins and minerals. This shift in dietary patterns has led to a heightened focus on maximizing the nutritional value and visual appeal of fruits and vegetables, driving the demand for chelated iron solutions that can enhance these attributes.

In addition, the cultivation of fruits and vegetables often involves intensive farming practices aimed at achieving high yields and optimal quality. These practices frequently require specialized nutrient inputs, including chelated iron, to address specific soil deficiencies and support robust plant growth. Chelated iron's ability to improve the efficiency of nutrient uptake and correct iron deficiencies directly contributes to the overall health and productivity of fruit and vegetable crops. The fruits and vegetables segment benefits from technological advancements in agriculture, including precision farming and advanced fertilization techniques. Precision agriculture tools, such as soil sensors and variable rate application systems, enable precise and targeted delivery of chelated iron, ensuring that crops receive the optimal amount of nutrients for their growth stages. These advancements enhance the effectiveness of chelated iron applications and support the market growth within this segment.

## Regional Insights

Asia-Pacific is the dominant region, driven by a combination of rapidly growing agricultural demand, expanding farmland, and increasing focus on crop productivity and soil health. This region, encompassing key agricultural nations such as China, India, Japan, and Australia, leads the market due to its large agricultural base and significant investment in agricultural technology. China, as the most populous country and one of the world's largest agricultural producers, plays a crucial role in the dominance of Asia-Pacific. The country's vast agricultural sector is characterized by its diverse crop production, including grains, vegetables, and fruits. The need to enhance soil fertility and address nutrient deficiencies, particularly iron, has led to substantial adoption of chelated iron micronutrients. China's government and agricultural organizations are increasingly promoting advanced fertilization techniques and micronutrient applications to improve crop yields and ensure food security for its growing population. This drive is further supported by China's commitment to modernizing its agricultural practices and increasing investment in research and development related to soil health and crop nutrition.

India, another major player in the region, has also significantly contributed to the



dominance of Asia-Pacific in the Chelated Iron Agricultural Micronutrient market. India's agricultural sector is vital for the country's economy and food security, with a focus on enhancing productivity through improved crop management practices. Iron deficiency in soils across many regions of India poses a substantial challenge, prompting increased use of chelated iron to correct these deficiencies and boost crop performance. The Indian government's initiatives support sustainable agriculture and improve soil health align with the benefits offered by chelated iron, further driving its market growth. Japan and Australia contribute to the region's leadership by adopting innovative agricultural practices and focusing on high-value crop production. In Japan, the integration of precision agriculture and advanced fertilization techniques has led to higher usage of chelated iron products to maintain optimal soil conditions and crop health. Australia's agricultural sector, known for its focus on efficiency and productivity, also benefits from chelated iron to manage soil health and support sustainable farming practices.

### Key Market Players

ADAMA Ltd.

Nutrien Ltd.

Akzo Nobel N.V.

Auriga Industries A/S

BASF SE

Bayer AG

Land O'Lakes Inc.

Sumitomo Chemical Co., Ltd

Syngenta Group

The Dow Chemical Co.

### Report Scope:

*Chelated Iron Agricultural Micronutrient Market - Global Industry Size, Share, Trends, Opportunity, and Foreca...*

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

#### Chelated Iron Agricultural Micronutrient Market, By Application:

Cereals

Fruits & vegetables

Pulses & Oilseeds

Others

#### Chelated Iron Agricultural Micronutrient Market, By Region:

North America

United States

Canada

Mexico

Europe

France

United Kingdom

Italy

Germany

Spain

Asia-Pacific

China

India

Japan

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 present in the Global Chelated Iron Agricultural Micronutrient Market.

## Available Customizations:

Global Chelated Iron Agricultural Micronutrient 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

*Chelated Iron Agricultural Micronutrient Market - Global Industry Size, Share, Trends, Opportunity, and Foreca...*

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

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