

Complex Fertilizers Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, 2018-2028 Segmented By Type (Incomplete Complex Fertilizers and Complete Complex Fertilizers), By Crop Type (Cereals, Oilseeds, Fruits & Vegetables and Others), By Form (Solid and Liquid), By Region and Competition

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Abstracts

Global Complex Fertilizers Market has valued at USD 52.37 Billion in 2022 and is anticipated to project impressive growth in the forecast period with a CAGR of 5.38% through 2028. Complex fertilizers are a versatile type of fertilizer that contain two or more essential plant nutrients, carefully formulated to cater to the specific needs of plants. These fertilizers offer a convenient solution by providing multiple nutrients in a single product, eliminating the hassle of using separate products for each nutrient. By offering a balanced combination of nutrients, complex fertilizers promote not only healthy and vigorous plant growth but also overall plant development. They ensure that plants receive a comprehensive range of essential nutrients in one application, leading to improved nutrient uptake, enhanced root development, and optimized plant metabolism. In addition to the primary macronutrient's nitrogen, phosphorous, and potassium (commonly known as NPK), complex fertilizers can also incorporate micronutrients such as magnesium, sulfur, and iron. These micronutrients play crucial roles in various plant physiological processes, contributing to optimal plant health and vitality.

Key Market Drivers

Rising Demand for Bio-Based & Micro-Nutrient Fertilizers

The global demand for complex fertilizers is expected to surge in the coming years, driven largely by the rising demand for bio-based and micro-nutrient fertilizers. These fertilizers, which are rich in multiple essential nutrients, play a crucial role in sustainable agriculture. With increasing awareness about the environmental impact of synthetic fertilizers, farmers worldwide are turning towards bio-based and micro-nutrient fertilizers, which align perfectly with complex fertilizers. Furthermore, the push for increased crop yield to feed the burgeoning global population has accentuated the need for fertilizers that provide balanced nutrient supply. Micro-nutrient fertilizers, being a significant part of the complex fertilizers, contribute to the growth and development of crops, reinforcing the demand for complex fertilizers. Additionally, the shift towards precision farming and customized fertilizer solutions is also influencing the global complex fertilizer market. Custom-made complex fertilizers can contain exact nutrient ratios needed for specific crops or soils, enhancing crop yield and soil fertility. Overall, the rising demand for bio-based and micro-nutrient fertilizers is a significant factor propelling the global complex fertilizers market forward.

Expanding Global Population & Food Requirements

The burgeoning global population and escalating food requirements are anticipated to drive an increased demand for complex fertilizers worldwide. As the world's population continues to grow, expected to reach nearly 10 billion by 2050, the pressure on agriculture intensifies, necessitating greater crop yields from the same or even less arable land. This demand is further augmented by changing dietary preferences towards more protein-rich diets, which require more intensive grain crops. Complex fertilizers, with their ability to provide multiple essential nutrients in a single product, play a pivotal role in enhancing soil fertility, promoting plant health, and improving crop yields. They offer agronomists a balanced, efficient, and economical means of delivering the necessary nutrients for crop growth. As such, their significance in global food production is expected to increase. Additionally, advancements in fertilizer technology are facilitating the development of more effective and environmentally friendly complex fertilizers, amplifying their appeal. Hence, in light of the escalating global population and rising food requirements, the demand for complex fertilizers is set to surge globally.

Rising Requirement of High Crop Yield for Biofuel Production

The increasing need for high crop yield, particularly for biofuel production, is expected to drive the global demand for complex fertilizers. Biofuels, derived from biomass such as

corn, soybeans, and sugarcane, play a crucial role as a renewable energy source in the global energy mix. As nations strive to reduce their carbon footprint, the demand for biofuels continues to grow, necessitating a proportional increase in agricultural yield from these crops. Consequently, this surge in demand fuels the need for complex fertilizers, which contain a balanced mix of essential nutrients for optimal plant growth. These fertilizers not only enhance soil fertility but also contribute to higher crop yields. Additionally, the growing awareness among farmers about the benefits of using complex fertilizers, along with supportive government policies promoting biofuel production, further drives the demand. Therefore, as the requirement for high-yielding crops for biofuels intensifies, the global demand for complex fertilizers continues to grow, fostering a mutually beneficial relationship between these two industries.

Drastic Growth in Greenhouse Developments

The global surge in greenhouse developments has significantly increased the demand for complex fertilizers. These fertilizers, composed of two or more essential plant nutrients, are indispensable for promoting plant growth and ensuring a healthy yield. As the world leans more towards sustainable agriculture, greenhouses are proving to be an efficient solution. They allow for year-round cultivation, control over environmental factors, and utilization of less water and land compared to traditional farming systems. Consequently, the need for complex fertilizers rises as they provide balanced nutrition to crops grown in such controlled environments. They enrich the soil with the necessary macro and micronutrients, improving the soil fertility and stimulating plant growth. Furthermore, this growth in demand is receiving a boost from the increasing understanding and awareness of sustainable farming practices among growers worldwide. Therefore, the drastic expansion in greenhouse developments, coupled with the drive towards more sustainable agricultural practices, is expected to perpetuate the global demand for complex fertilizers.

Key Market Challenges

Unstable Raw Material Prices & Adoption of Organic Fertilizers

Unstable raw material prices and the rising preference for organic fertilizers are anticipated to dampen the global demand for complex fertilizers. The complex fertilizer industry heavily depends on raw materials like potash, phosphate, and nitrogen, whose prices fluctuate frequently due to factors such as trade restrictions, geopolitical tensions, and changes in currency value. Such instability in raw material costs directly affects the production cost of complex fertilizers, making them less affordable for farmers.

Furthermore, the gradual shift towards organic farming is further expected to negatively impact the demand for these fertilizers. The adoption of organic fertilizers is being driven by increasing consumer awareness about the harmful effects of chemical fertilizers on human health and the environment. As a result, farmers globally are transitioning to organic fertilizers that improve soil fertility and crop yield, without posing risks to the environment. This shift towards organic farming practices is not only driven by consumer demand but also by government regulations and incentives promoting sustainable agriculture.

Moreover, the mounting environmental concerns and price instability in the complex fertilizer market pose significant challenges. Farmers are increasingly recognizing the importance of sustainable practices to mitigate the negative impacts of agriculture on the environment and human health. The need for environmentally-friendly solutions, coupled with the volatile prices of raw materials, is leading to a downward trend in the global demand for complex fertilizers. As the agriculture industry continues to evolve, there is a growing emphasis on finding alternative and sustainable fertilization methods that balance productivity and environmental impact.

Stringent Regulatory Policies

Strict regulatory policies globally are anticipated to decrease the demand for complex fertilizers. This reduction in demand is due to several factors. Regulatory bodies worldwide are imposing stricter guidelines on the manufacturing, usage, and disposal of complex fertilizers to limit their impact on the environment. These policies aim to control the levels of hazardous chemicals and heavy metals within the products, ensuring they do not exceed permissible limits. Consequently, this has increased the manufacturing costs, making complex fertilizers less appealing to farmers seeking cost-effective solutions for crop production. There is a growing emphasis on sustainable and organic farming practices, discouraging the use of chemical-based complex fertilizers. These practices align with global efforts towards environmental preservation and food safety, further diminishing the demand for complex fertilizers. Stringent regulations on the transport and storage of such fertilizers can also hamper their global market. Thus, stricter regulatory policies are expected to gradually reduce the global demand for complex fertilizers.

Key Market Trends

Increasing Developments & New Launches of Complex Fertilizers Market

The global complex fertilizers market is poised for robust growth and expansion due to increasing developments and new product launches. These advancements are primarily driven by the rising global demand for high-efficiency fertilizers, spurred by the escalating need to enhance crop yield and productivity. The gradual shift towards sustainable farming techniques has further fueled the need for complex fertilizers, which offer balanced nutrition to crops, thereby ensuring better quality and yield. With new players entering the market and existing ones focusing on innovation, a wide array of sophisticated complex fertilizers are being introduced. These newly launched products, often more efficient, environmentally friendly, and tailored to specific crop needs, are expected to significantly increase the demand for complex fertilizers globally. Moreover, the involvement of R&D in developing such fertilizers that cater to diverse soil conditions and crop types across different regions is also a contributing factor to the expected demand surge. As we move forward, the complex fertilizers market is predicted to witness substantial growth, riding on the back of these innovative developments and new product introductions.

Rapid Developments in Fruit & Vegetable Trades

The global fruit and vegetable trade sector is currently experiencing a rapid expansion, driven by the ever-increasing consumer demand for fresh and high-quality produce. This growth is not only a result of the rising population but also the shift towards healthier eating habits and the growing awareness of the benefits of consuming fruits and vegetables. As people become more health-conscious, there is a greater emphasis on incorporating nutrient-rich foods into their diets.

By providing crops with the right combination of nutrients, complex fertilizers not only enhance the overall productivity and yield but also contribute to the production of superior quality produce. This is particularly important in the international fruit and vegetable trades, where consumers have high expectations for fresh, flavorful, and visually appealing products. Moreover, the increasing adoption of precision farming techniques, such as soil testing and data-driven decision-making, further emphasizes the need for efficient nutrient management strategies. Complex fertilizers, with their tailored nutrient profiles, offer precise control over the nutrient supply to plants, ensuring optimal growth and minimizing waste. This not only benefits the farmers by maximizing their yields but also contributes to the overall sustainability of agricultural practices.

The global trend towards agricultural sustainability and food security also plays a significant role in driving the demand for complex fertilizers. As farmers strive to achieve higher crop yields without degrading soil health, the importance of using

environmentally friendly and resource-efficient fertilizers becomes evident. Complex fertilizers, with their ability to deliver nutrients in a controlled and targeted manner, provide a sustainable solution that supports long-term soil fertility and minimizes the environmental impact. The combination of increasing consumer demand for fresh and high-quality produce, the growing pressure for sustainable farming practices, the rising adoption of precision farming techniques, and the global focus on agricultural sustainability and food security are all contributing to the surge in the global demand for complex fertilizers. As the fruit and vegetable trade sector continues to expand, it is crucial for farmers and producers to embrace these innovative fertilizers to meet the demands of consumers while ensuring long-term productivity and environmental stewardship.

Segmental Insights

Type Insights

Based on the type, in the year 2022, according to projections, the comprehensive Complex Fertilizers category is expected to dominate and exert its influence over the majority of the market. This dominance is primarily attributed to their extensive utilization in greenhouse applications, where their effectiveness is highly valued. These fertilizers have gained significant popularity and are sought-after by farmers and gardeners worldwide.

One remarkable example of a complex fertilizer is diammonium phosphate (DAP). DAP not only serves as a vital nutrient source for plants but also plays a significant role in enhancing their resilience against diseases and droughts. This dual functionality ensures the optimal growth and well-being of plants, making DAP a preferred choice for many agricultural and horticultural practices. With its ability to provide essential nutrients and bolster plants' ability to withstand challenging environmental conditions, complex fertilizers like DAP are playing a vital role in modern agriculture. By supporting plant health and growth, these fertilizers contribute to increased crop yields and overall agricultural productivity.

Crop Type Insights

Based on the Crop Type, Cereals, such as wheat, rice, and corn, are predicted to have the greatest market share and the fastest-growing compound annual growth rate (CAGR) over the projection period. The dominance of cereal crops in the market is attributed to their ability to yield high quantities of food and effectively address the issue

of food shortages in emerging countries. This has led to a significant increase in demand for cereals, driven not only by their use in vegetable oil for biodiesel but also by their consumption as a staple food by millions of people worldwide. The consumption of cereals, particularly in emerging countries, is remarkably high, and as a result, cereal crops have gained popularity as lucrative cash crops for farmers in these regions. This growing trend highlights the importance and potential of cereals in sustaining food security and economic growth on a global scale.

Regional Insights

The Asia Pacific region is currently dominating the Global Complex Fertilizers Market, and this can be attributed to a multitude of factors. One of the significant factors is the high population density in the region, which leads to an increased demand for food production. As a result, there is a pressing need for efficient agricultural practices that can ensure optimal yield and crop quality. This is where complex fertilizers play a crucial role, as they provide the necessary nutrients and enhance soil fertility to support sustainable and productive farming.

Furthermore, the growth of the Complex Fertilizers Market in the Asia Pacific region is also influenced by favorable government policies implemented in countries like India and China. These policies actively promote the utilization of complex fertilizers in agricultural practices to maximize crop output and ensure food security. Additionally, there has been a significant increase in the awareness and adoption of modern farming practices among farmers in the region. This shift towards more advanced and sustainable farming techniques has further contributed to the rising demand for complex fertilizers.

Key Market Players

Agrium Inc.

CF Industries Holdings, Inc

Chambal Fertilisers & Chemicals Ltd

Coromandel International Ltd.

Deepak Fertilisers & Petrochemicals Corporation Ltd.

Eurochem Group AG

Haifa Chemicals Ltd.

Helena Chemical Company

ICL Group Ltd.

Israel Chemicals Limited

Report Scope:

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

Complex Fertilizers Market, By Type:

Incomplete Complex Fertilizers

Complete Complex Fertilizers

Complex Fertilizers Market, By Crop Type:

Cereals

Oilseeds

Fruits & Vegetables

Others

Complex Fertilizers Market, By Form:

Solid

Liquid

Complex Fertilizers 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

Kuwait

Turkey

Egypt

Competitive Landscape

Company Profiles: Detailed analysis of the major companies present in the Global Complex Fertilizers Market.

Available Customizations:

Global Complex Fertilizers market report with the given market data, Tech Sci 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).

Contents

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations

2. RESEARCH METHODOLOGY

- 2.1. Objective of the Study
- 2.2. Baseline Methodology
- 2.3. Key Industry Partners
- 2.4. Major Association and Secondary Sources
- 2.5. Forecasting Methodology
- 2.6. Data Triangulation & Validations
- 2.7. Assumptions and Limitations

3. EXECUTIVE SUMMARY

- 3.1. Overview of the Market
- 3.2. Overview of Key Market Segmentations
- 3.3. Overview of Key Market Players
- 3.4. Overview of Key Regions/Countries
- 3.5. Overview of Market Drivers, Challenges, Trends

4. VOICE OF CUSTOMER

5. GLOBAL COMPLEX FERTILIZERS MARKET OUTLOOK

- 5.1. Market Size & Forecast
 - 5.1.1. By Value
- 5.2. Market Share & Forecast
 - 5.2.1. By Type (Incomplete Complex Fertilizers and Complete Complex Fertilizers)
 - 5.2.2. By Crop Type (Cereals, Oilseeds, Fruits & Vegetables and Others)
 - 5.2.3. By Form (Solid and Liquid)
 - 5.2.4. By Region

- 5.2.5. By Company (2022)
- 5.3. Market Map

6. NORTH AMERICA COMPLEX FERTILIZERS MARKET OUTLOOK

- 6.1. Market Size & Forecast
 - 6.1.1. By Value
- 6.2. Market Share & Forecast
 - 6.2.1. By Type
 - 6.2.2. By Crop Type
 - 6.2.3. By Form
 - 6.2.4. By Country
- 6.3. North America: Country Analysis
 - 6.3.1. United States Complex Fertilizers Market Outlook
 - 6.3.1.1. Market Size & Forecast
 - 6.3.1.1.1. By Value
 - 6.3.1.2. Market Share & Forecast
 - 6.3.1.2.1. By Type
 - 6.3.1.2.2. By Crop Type
 - 6.3.1.2.3. By Form
 - 6.3.2. Canada Complex Fertilizers Market Outlook
 - 6.3.2.1. Market Size & Forecast
 - 6.3.2.1.1. By Value
 - 6.3.2.2. Market Share & Forecast
 - 6.3.2.2.1. By Type
 - 6.3.2.2.2. By Crop Type
 - 6.3.2.2.3. By Form
 - 6.3.3. Mexico Complex Fertilizers Market Outlook
 - 6.3.3.1. Market Size & Forecast
 - 6.3.3.1.1. By Value
 - 6.3.3.2. Market Share & Forecast
 - 6.3.3.2.1. By Type
 - 6.3.3.2.2. By Crop Type
 - 6.3.3.2.3. By Form

7. EUROPE COMPLEX FERTILIZERS MARKET OUTLOOK

- 7.1. Market Size & Forecast
 - 7.1.1. By Value

7.2. Market Share & Forecast

7.2.1. By Type

7.2.2. By Crop Type

7.2.3. By Form

7.2.4. By Country

7.3. Europe: Country Analysis

7.3.1. Germany Complex Fertilizers Market Outlook

7.3.1.1. Market Size & Forecast

7.3.1.1.1. By Value

7.3.1.2. Market Share & Forecast

7.3.1.2.1. By Type

7.3.1.2.2. By Crop Type

7.3.1.2.3. By Form

7.3.2. United Kingdom Complex Fertilizers Market Outlook

7.3.2.1. Market Size & Forecast

7.3.2.1.1. By Value

7.3.2.2. Market Share & Forecast

7.3.2.2.1. By Type

7.3.2.2.2. By Crop Type

7.3.2.2.3. By Form

7.3.3. Italy Complex Fertilizers Market Outlook

7.3.3.1. Market Size & Forecast

7.3.3.1.1. By Value

7.3.3.2. Market Share & Forecast

7.3.3.2.1. By Type

7.3.3.2.2. By Crop Type

7.3.3.2.3. By Form

7.3.4. France Complex Fertilizers Market Outlook

7.3.4.1. Market Size & Forecast

7.3.4.1.1. By Value

7.3.4.2. Market Share & Forecast

7.3.4.2.1. By Type

7.3.4.2.2. By Crop Type

7.3.4.2.3. By Form

7.3.5. Spain Complex Fertilizers Market Outlook

7.3.5.1. Market Size & Forecast

7.3.5.1.1. By Value

7.3.5.2. Market Share & Forecast

7.3.5.2.1. By Type

7.3.5.2.2. By Crop Type

7.3.5.2.3. By Form

8. ASIA-PACIFIC WATER-SOLUBLE FERTILIZERS MARKET OUTLOOK

8.1. Market Size & Forecast

8.1.1. By Value

8.2. Market Share & Forecast

8.2.1. By Type

8.2.2. By Crop Type

8.2.3. By Form

8.2.4. By Country

8.3. Asia-Pacific: Country Analysis

8.3.1. China Complex Fertilizers Market Outlook

8.3.1.1. Market Size & Forecast

8.3.1.1.1. By Value

8.3.1.2. Market Share & Forecast

8.3.1.2.1. By Type

8.3.1.2.2. By Crop Type

8.3.1.2.3. By Form

8.3.2. India Complex Fertilizers Market Outlook

8.3.2.1. Market Size & Forecast

8.3.2.1.1. By Value

8.3.2.2. Market Share & Forecast

8.3.2.2.1. By Type

8.3.2.2.2. By Crop Type

8.3.2.2.3. By Form

8.3.3. Japan Complex Fertilizers Market Outlook

8.3.3.1. Market Size & Forecast

8.3.3.1.1. By Value

8.3.3.2. Market Share & Forecast

8.3.3.2.1. By Type

8.3.3.2.2. By Crop Type

8.3.3.2.3. By Form

8.3.4. South Korea Complex Fertilizers Market Outlook

8.3.4.1. Market Size & Forecast

8.3.4.1.1. By Value

8.3.4.2. Market Share & Forecast

8.3.4.2.1. By Type

- 8.3.4.2.2. By Crop Type
- 8.3.4.2.3. By Form
- 8.3.5. Australia Complex Fertilizers Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Type
 - 8.3.5.2.2. By Crop Type
 - 8.3.5.2.3. By Form

9. SOUTH AMERICA COMPLEX FERTILIZERS MARKET OUTLOOK

- 9.1. Market Size & Forecast
 - 9.1.1. By Value
- 9.2. Market Share & Forecast
 - 9.2.1. By Type
 - 9.2.2. By Crop Type
 - 9.2.3. By Form
 - 9.2.4. By Country
- 9.3. South America: Country Analysis
 - 9.3.1. Brazil Complex Fertilizers Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Type
 - 9.3.1.2.2. By Crop Type
 - 9.3.1.2.3. By Form
 - 9.3.2. Argentina Complex Fertilizers Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Type
 - 9.3.2.2.2. By Crop Type
 - 9.3.2.2.3. By Form
 - 9.3.3. Colombia Complex Fertilizers Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Type

9.3.3.2.2. By Crop Type

9.3.3.2.3. By Form

10. MIDDLE EAST AND AFRICA COMPLEX FERTILIZERS MARKET OUTLOOK

10.1. Market Size & Forecast

10.1.1. By Value

10.2. Market Share & Forecast

10.2.1. By Type

10.2.2. By Crop Type

10.2.3. By Form

10.2.4. By Country

10.3. MEA: Country Analysis

10.3.1. South Africa Complex Fertilizers Market Outlook

10.3.1.1. Market Size & Forecast

10.3.1.1.1. By Value

10.3.1.2. Market Share & Forecast

10.3.1.2.1. By Type

10.3.1.2.2. By Crop Type

10.3.1.2.3. By Form

10.3.2. Saudi Arabia Complex Fertilizers Market Outlook

10.3.2.1. Market Size & Forecast

10.3.2.1.1. By Value

10.3.2.2. Market Share & Forecast

10.3.2.2.1. By Type

10.3.2.2.2. By Crop Type

10.3.2.2.3. By Form

10.3.3. UAE Complex Fertilizers Market Outlook

10.3.3.1. Market Size & Forecast

10.3.3.1.1. By Value

10.3.3.2. Market Share & Forecast

10.3.3.2.1. By Type

10.3.3.2.2. By Crop Type

10.3.3.2.3. By Form

10.4. Drivers

10.5. Challenges

11. MARKET TRENDS & DEVELOPMENTS

- 11.1. Recent Development
- 11.2. Mergers & Acquisitions
- 11.3. Product Launches

12. GLOBAL COMPLEX FERTILIZERS MARKET: SWOT ANALYSIS

13. PORTER'S FIVE FORCES ANALYSIS

- 13.1. Competition in the Industry
- 13.2. Potential of New Entrants
- 13.3. Power of Suppliers
- 13.4. Power of Customers
- 13.5. Threat of Substitute Products

14. COMPETITIVE LANDSCAPE

- 14.1. Agrium Inc.
 - 14.1.1. Business Overview
 - 14.1.2. Service Offerings
 - 14.1.3. Recent Developments
 - 14.1.4. Key Personnel
 - 14.1.5. SWOT Analysis
- 14.2. CF Industries Holdings, Inc
- 14.3. Chambal Fertilisers & Chemicals Ltd
- 14.4. Coromandel International Ltd.
- 14.5. Deepak Fertilisers & Petrochemicals Corporation Ltd.
- 14.6. Eurochem Group AG
- 14.7. Haifa Chemicals Ltd.
- 14.8. Helena Chemical Company
- 14.9. ICL Group Ltd.
- 14.10. Israel Chemicals Limited

15. STRATEGIC RECOMMENDATIONS

16. ABOUT US & DISCLAIMER

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