

**Fertilizer Additives Market Report by Function (Dust Control Agent, Anticaking Agent, Antifoaming Agent, Hydrophobing Agent, Corrosion Inhibitor, and Others), Form (Granular, Prilled, Powdered), Application (Urea, Monoammonium Phosphate, Triple Super Phosphate, Diammonium Phosphate, Ammonium Nitrate, and Others), and Region 2024-2032**

Market Report | 2024-09-10 | 140 pages | IMARC Group

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**Report description:**

The global fertilizer additives market size reached US\$ 3.0 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 3.6 Billion by 2032, exhibiting a growth rate (CAGR) of 2% during 2024-2032. The increasing awareness among individuals towards soil deterioration caused by conventional agricultural practices is primarily augmenting the market.

**Fertilizer Additives Market Analysis:**

- Major Market Drivers: The growing demand for anti-dusting, corrosion inhibitors, and hygroscopic agents to inhibit the loss of macro and micronutrients as well as improve the productivity of the soil is one of the primary factors bolstering the market. Besides this, the launch of policies by government bodies to generate awareness about the usage of novel value-added fertilizers is also acting as another significant growth-inducing factor.
- Key Market Trends: Continuous innovations in the agriculture industry, including the introduction of urea-based fertilizers, are among the emerging trends stimulating the market. Moreover, the increasing expenditure capacities of farmers on enhancing crop productivity are further positively influencing the fertilizer additives market outlook.
- Competitive Landscape: Some of the prominent companies in the global market include Amit Trading Ltd, ArrMaz (Arkema S.A.), BASF SE, Clariant AG, Corteva Inc., Dorf-Ketal Chemicals India Private Limited, Holland Novochem B.V., Hubei Forbon Technology Co Ltd, KAO Corporation, Michelman Inc., Solvay S.A., and Tolsa SA, among many others.
- Geographical Trends: In Asia Pacific, the expanding agricultural production is driving the market growth. In line with this, the

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escalating demand for high-yield crops and stringent environmental regulations are strengthening the market across Europe. Moreover, the widespread emphasis on industry players on promoting the use of sustainable and organic farming practices is further contributing to the market in North America.

-□Challenges and Opportunities: One of the main challenges hindering the market includes the rising concerns towards ensuring product efficacy while reducing environmental impact. However, extensive investments in R&D activities to introduce more efficient and sustainable fertilizers are expected to fuel the global market over the forecasted period.

#### Fertilizer Additives Market Trends:

##### Advanced Nutrient Management Technologies

The inflating need for optimizing the use of fertilizers is augmenting the adoption of novel technologies to ensure that plants receive the necessary nutrients at the right time and in the right amounts. For example, in June 2024, DPH Biologicals introduced Envelix™ Prime, a patented biological nutrient enhancer specifically designed to uniformly cover bulk dry fertilizer, thereby delivering a robust biological consortium in a single application. Additionally, it contains naturally occurring beneficial bacterial and fungal microorganisms to maximize and accelerate fertility release by using a carrier to adhere microorganisms to the fertilizer prill. This trend is driven by the need to increase agricultural productivity while minimizing environmental impact. For instance, in June 2024, a fertilizer maker, Paradeep Phosphates (PPL), unveiled nano urea and DAP products. The nano urea is a revolution in the agriculture sector, as it has the potential to reduce storage space while improving crop yield. Apart from this, advanced technologies also contribute to sustainable farming practices, which will continue to fuel the market over the forecasted period. In May 2024, FRST (Fertilizer Recommendation Support Tool) project partners announced the release of a web-based tool that provides unbiased and science-based interpretations of soil test phosphorus and potassium values for crop fertilization.

##### Popularity of Precision Agriculture

The emerging trend of using precision agriculture practices, which involves the use of data-driven approaches, is acting as a significant growth-inducing factor. For instance, in June 2024, LG CNS, one of the information technology service providers, launched an AI-driven platform that analyzes meteorological data and soil to optimize fertilizer usage and irrigation schedules while also predicting pest outbreaks as well as recommending pesticides. Moreover, the widespread adoption of sensors and IoT devices is also contributing to the fertilizer additives market growth. For example, in January 2024, the Council of Scientific and Industrial Research (CSIR) introduced a mission to develop region-specific smart agro-technologies for paddy in South India. The project envisages the use of the Internet of Things (IoT) based sensors to generate a real-time precision database across different agro-climatic conditions of the country. Apart from this, smart fertilizers, such as those offered by Yara International, use advanced technology to ensure that nutrients are delivered precisely when and where plants need them. Furthermore, in April 2024, Nitricity Inc. launched the field trial of climate-smart nitrogen fertilizer on almond trees with Olam Food Ingredients in California's Central Valley.

##### Demand for Biological Additives

The rising consumer environmental consciousness is escalating the demand for microbial and biological additives in fertilizers as an effective way to boost crop health and productivity naturally. For instance, in March 2024, Nachurs Alpine Solutions (NAS) introduced a new biostimulant product line called NACHURS Enduro-Shield to protect genetic yield potential in a variety of crops. Moreover, products, including Rhizobium bacteria and Mycorrhizal fungi, are examples of biological additives that form symbiotic relationships with plants, thereby facilitating better nutrient absorption. Similarly, in March 2024, Kraton Corporation, one of the sustainable producers of high-value biobased products and specialty polymers, developed SYLVASOLV, a biobased fertilizer coating to meet the unique functional needs of the agriculture industry. Besides this, the elevating need for organic and sustainable farming practices is also strengthening the market. In January 2024, Zuari Farmhub Ltd (ZFHL) unveiled its nano fertilizer additives, Nano Shakti Nano DAP and Nano Shakti Nano Urea, that are produced by using green biotechnology.

#### Global Fertilizer Additives Industry Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with the market forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on the function, form, and application.

#### Breakup by Function:

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- Dust Control Agent
- Anticaking Agent
- Antifoaming Agent
- Hydrophobing Agent
- Corrosion Inhibitor
- Others

The report has provided a detailed breakup and analysis of the market based on the function. This includes dust control agent, anticaking agent, antifoaming agent, hydrophobing agent, corrosion inhibitor, and others.

Dust control agents are used to minimize the formation of dust during the handling and transportation of fertilizers, improving air quality and reducing health hazards. For example, compounds like lignosulfonates and calcium lignosulfonates are commonly used as dust control agents. Anticaking agents prevent the formation of lumps in fertilizers, ensuring smooth application; examples include materials like ammonium nitrate and calcium carbonate. Antifoaming agents, such as silicone-based additives, are incorporated to reduce foam formation during fertilizer production, enhancing operational efficiency. Hydrophobing agents, like fatty acids and waxes, are used to make fertilizers water-repellent, thereby extending their shelf life and preventing moisture-related degradation. Corrosion inhibitors, including zinc phosphate and sodium nitrite, protect fertilizer storage and application equipment from corrosive damage, thus extending their lifespan. Other additives may include stabilizers, preservatives, and enhancers that improve the overall performance and effectiveness of fertilizers. These functional additives are essential in optimizing the production, storage, and application of fertilizers, ultimately contributing to more efficient and sustainable agricultural practices.

Breakup by Form:

- Granular
- Prilled
- Powdered

The report has provided a detailed breakup and analysis of the market based on the form. This includes granular, prilled, and powdered.

The fertilizer additives market encompasses various forms, including granular, prilled, and powdered, each catering to different application needs and preferences. Granular additives are widely used due to their ease of handling, uniform distribution, and controlled release properties. For instance, Mosaic's MicroEssentials offer a granular form that combines essential nutrients and additives for improved crop performance. Prilled additives, characterized by their small, spherical shape, provide excellent flowability and even spreading, making them ideal for precision farming. A notable product launch in this segment is the CAN27 from Borealis, which features prilled calcium ammonium nitrate enhanced with additives for increased efficacy. Powdered additives, known for their high solubility, are commonly used in fertigation systems and foliar applications. YaraVita from Yara International is an example of a powdered additive line that provides targeted nutrient delivery. This, in turn, is elevating the fertilizer additives market share in this segmentation.

Breakup by Application:

- Urea
- Monoammonium Phosphate
- Triple Super Phosphate
- Diammonium Phosphate
- Ammonium Nitrate
- Others

The report has provided a detailed breakup and analysis of the market based on the application. This includes urea, monoammonium phosphate, triple super phosphate, diammonium phosphate, ammonium nitrate, and others.

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Urea, one of the most common nitrogen fertilizers, often incorporates additives like urease inhibitors to reduce nitrogen loss through volatilization. For instance, AGROTAIN? from Koch Agronomic Services is a popular additive for urea. Furthermore, monoammonium phosphate benefits from anticaking agents to maintain its free-flowing nature. Triple superphosphate, used for its high phosphorus content, often includes dust control agents to improve handling safety. In addition, diammonium phosphate, a widely used phosphorus and nitrogen source, utilizes additives to prevent moisture absorption and caking. Ammonium nitrate incorporates corrosion inhibitors to protect storage and application equipment from damage. Additionally, other fertilizers like potassium nitrate and calcium ammonium nitrate also benefit from various additives to improve stability, handling, and nutrient delivery.

Breakup by Region:

- [ ] North America
  - o [ ] United States
  - o [ ] Canada
- [ ] Asia-Pacific
  - o [ ] China
  - o [ ] Japan
  - o [ ] India
  - o [ ] South Korea
  - o [ ] Australia
  - o [ ] Indonesia
  - o [ ] Others
- [ ] Europe
  - o [ ] Germany
  - o [ ] France
  - o [ ] United Kingdom
  - o [ ] Italy
  - o [ ] Spain
  - o [ ] Russia
  - o [ ] Others
- [ ] Latin America
  - o [ ] Brazil
  - o [ ] Mexico
  - o [ ] Others
- [ ] Middle East and Africa

The market research report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa.

In North America, the market is primarily driven by advanced agricultural practices and stringent environmental regulations, leading to a high demand for sustainable and efficient additives. The United States is the world's fourth-largest producer of nitrogen fertilizers and the second-largest producer of phosphate. In August 2023, U.S.-based sustainable fertilizer startup Phospholutions secured an additional US\$10.15 Million to accelerate the commercialization of its RhizoSorb fertilizer additive in the country. Moreover, the growing food demand in the Asia Pacific region is also acting as another significant growth-inducing factor. Besides this, the escalating demand for biofertilizers is further bolstering the market across Europe. For example, in August 2023, Bionema Group Ltd. developed a wide range of biofertilizer products in the UK for use in agriculture. Latin America, with its expansive agricultural lands, particularly in Brazil and Argentina, focuses on improving crop productivity through advanced

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additives like anticaking agents to maintain fertilizer quality in humid conditions, with firms like Nutrien providing tailored solutions. In the Middle East and Africa, where arid climates prevail, the market for additives that enhance water retention and nutrient delivery, such as those developed by Yara International, is growing.

#### Competitive Landscape:

The market research report has provided a comprehensive analysis of the competitive landscape. Detailed profiles of all major fertilizer additives market companies have also been provided. Some of the key players in the market include:

- Amit Trading Ltd
- ArrMaz (Arkema S.A.)
- BASF SE
- Clariant AG
- Corteva Inc.
- Dorf-Ketal Chemicals India Private Limited
- Holland Novochem B.V.
- Hubei Forbon Technology Co Ltd
- KAO Corporation
- Michelman Inc.
- Solvay S.A.
- Tolsa SA

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

#### Fertilizer Additives Market Recent Developments:

- June 2024: DPH Biologicals launched Envelix™ Prime, a patented biological nutrient enhancer designed to cover bulk dry fertilizer uniformly.
- March 2024: Kraton Corporation, one of the sustainable producers of high-value biobased products and specialty polymers, introduced SYLVASOLV, a biobased fertilizer coating, to meet the unique functional needs of the agriculture industry.
- January 2024: Zuari Farmhub Ltd (ZFHL) unveiled its nano fertilizer additives, Nano Shakti Nano DAP and Nano Shakti Nano Urea, that are produced by using green biotechnology.

#### Key Questions Answered in This Report:

- How has the global fertilizer additives market performed so far and how will it perform in the coming years?
- What has been the impact of COVID-19 on the global fertilizer additives market?
- What are the key regional markets?
- What is the breakup of the market based on the function?
- What is the breakup of the market based on the form?
- What is the breakup of the market based on the application?
- What are the various stages in the value chain of the industry?
- What are the key driving factors and challenges in the industry?
- What is the structure of the global fertilizer additives market and who are the key players?
- What is the degree of competition in the industry?

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