

Fertigation and Chemigation Market Assessment, By Agricultural Input [Fertilizers, Insecticides, Herbicides, Fungicides, Others], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Application [Agricultural Irrigation, Greenhouse Irrigation, Landscape Irrigation, Others], By Irrigation Type [Drip Irrigation, Sprinkler Irrigation, Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-02-19 | 231 pages | Market Xcel - Markets and Data

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Report description:

Global fertigation and chemigation market is projected to witness a CAGR of 5.51% during the forecast period 2025-2032, growing from USD 48.11 billion in 2024 to USD 73.89 billion in 2032. The market is growing owing to rising demand for efficient agricultural practices and sustainable resource usage. Fertigation refers to the application of fertilizers through irrigation systems, and chemigation is the application of chemicals such as pesticides and herbicides through similar methods. Increasing population and changes in dietary preference are responsible for the increasing global food demands that necessitate growing crop yields and improved agricultural productivity, contributing to market growth.

Key benefits of fertigation and chemigation are reduced water waste, lower labor costs, and increased resistance to droughts, making these methods attractive for modern farming. The market is particularly strong in regions like Europe, where it is also expected to be the segment attracting the most extensive CAGR due to increasing use brought about by government initiatives and subsidies toward resource optimization.

Sustained advancement of mechanized technology application in agriculture has widened the market as farmers seek to enrich the application of nutrients while reducing environmental degradation. The awareness of these benefits is growing among farmers, and hence the fertigation and chemigation market is expected to witness developments in the years to come.

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In June 2023, a new range of advanced fertigation products was introduced in North America under the Nova brand name by ICL, owned by Everris International B.V. The goal is to supply crops with high-quality, water-soluble N-P-Ks (Nitrogen, Phosphorus, and Potassium) and micronutrients. Nova FINISH, Nova PULSE, Nova ELEVATE, and Nova FLOW are among the varieties. These products are developed to achieve maximum solubility and good compatibility with the majority of herbicides and crop protectants, with the primary goal of more effectively delivering crop nutrients to the targeted site of action.

Rising Awareness Catalyzes Market Expansion

Growing awareness of sustainable agricultural practices is, increasingly and prominently, spurring on the development of the global market for fertigation and chemigation. An increasing number of farmers and other stakeholders are acknowledging the merits gained from enhanced nutrient delivery and reduced environmental footprint, leading to higher adoption rates. Fertigation and chemigation offer a better opportunity to deliver fertilizers and chemicals into plants through irrigation systems while ensuring precise application in the crop for leaching and runoff control. Benefits include higher yields and better quality produce, making both methods popular among farmers desiring to increase productivity as demand for food increases. Moreover, the government schemes and initiatives further encourage the trend of adopting advanced irrigation techniques for the effective use of water for agricultural needs. Overall, an increased perception of the benefits associated with fertigation and chemigation is driving their incorporation in modern-day agriculture worldwide, making them part of sustainable farming. In September 2023, AGRIVI Ltd. introduced a new module for fertigation management that improves crop sustainability and yield. The module is designed mostly for greenhouse-grown vegetables and berries on substrate, which completely changes how crops are grown.

Increasing Food Demand Influences the Market Growth

The growing demand for food drives growth in the fertigation and chemigation market. The need for efficient agricultural practices has become more necessary as the global population increases. Fertigation, by way of delivering fertilizers through some irrigation system and chemigation, that applies chemicals like pesticides through similar means, allows farmers the possibility to respond to their demand more effectively. Both of these techniques enhance nutrient use efficiency and waste minimization, with consequent improvements in crop productivity possible under lower resource inputs.

According to the WFP 2025 Global Outlook, an estimated 343 million people in the 74 countries where the United Nations World Food Programme (WFP) works are acutely food insecure, which is 10% higher than in 2023 and about 200 million more than prior to the pandemic. In 2024, an estimated 1.9 million people-mostly in Gaza and Sudan but also in Haiti, Mali, and some areas of South Sudan-are at risk of starvation.

Changes in urbanization or preferences in dietary habits demand a larger increase in food production. Governments are also involved in these progressive improvements through subsidies and initiatives that support agricultural sustainability.

Drip Irrigation Holds the Dominant Market Share

The share of drip irrigation in the fertigation and chemigation market will continue to dominate even during the forecast period. This technique is preferred due to its efficiency in supplying water and nutrients directly to the root zone of the plants, which increases the absorption by minimizing wastage. The very precise drip irrigation systems enable targeted application using considerably reduced fertilizer loss but maintaining optimum moisture levels in the crops.

The growing awareness of water conservation and sustainable agricultural practices further boosts the adoption of drip irrigation. As climate change exacerbates the water scarcity issue, farmers rapidly embrace drip systems to improve yields using fewer resources. Such a trend also leverages government initiatives encouraging the adoption of advanced irrigation technologies. In March 2024, a new chemigation bill was passed for Idaho-based chemigators. As per the new bill, chemigators no longer need to replicate the licensing procedure and examinations for pesticide applicators in order to obtain a license; instead, they can now choose to participate in an ISDA program, either in person or online. Previously, regardless of whether they were using fertilizer or pesticides, all chemigators had to get a pesticide applicator license.

Cost-effective for farmers, drip irrigation has lower labor costs than conventional methods and better fertilizer management. The drip irrigation segment remains on track for further growth as it is cemented by best-in-class performance and environmental advantages as being the most preferred technique in the fertigation and chemigation market.

Europe Dominates the Market

The fertigation and chemigation market is dominated by Europe, and is expected to continue during the forecast period. The

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domination is accounted for by the growing population and the increasing demand for high-quality crops in the region. The processes of fertigation and chemigation are especially efficient for nutrient application, where the loss by leaching is significantly reduced, and there is an improvement in the yield and quality of the crops.

In May 2024, Wiseconn Engineering, Inc., a precision irrigation firm based in California, introduced its RF-V1 field device in Europe to broaden its product line. This device is intended to make controlling the valves in its DropControl irrigation system easier. Users are able to better manage water resources and adjust to the effects of climate change with the help of the company's unique DropControl technology. The improved functionality of proprietary DropControl technology satisfies all requirements in the fertigation and irrigation fields.

Moreover, countries in Europe, such as Germany, the UK, France, and Spain, invest in research and adopt changes to improve production and welfare. The challenges of diminishing farmland and the changeability of the climate, among others, are also affecting the natural resource landscape of agriculture in Europe and forcing farmers to devise innovative practices to maintain productivity.

Future Market Scenario (2025 - 2032F)

-□Innovation in fertigation and chemigation systems is slated to bring about improvement in their efficiency and efficacy.

-□Developing government promotions on these technologies with the increasing demand for agricultural productivity due to population growth shall hence give bullish market opportunities for players across the regions.

-□The fertigation and chemigation market in developing countries is expected to expand rapidly due to the increasing demand for agricultural production.

Key Players Landscape and Outlook

The fertigation and chemigation industry is a competitive one, with several leading players engaged in proactive efforts toward product innovation, research, and development. Companies are striving to boost their own market presence through alliances, mergers, and acquisitions to enhance their technological capabilities and offerings. Moreover, the thrust of sustainability has brought about the need for these players to embrace advanced irrigation technologies to optimize resource use and minimize the effects on the environment.

Furthermore, major companies are spending huge amounts on R&D in efficacious fertigation and chemigation systems to meet the needs of a growing population for high-quality crops. On the other hand, local players are getting a foothold by introducing cost-effective solutions customized for specific regional practices.

The market outlook appears to be positive due to the demand for the significant demand, leading to the adoption of precision agriculture technologies within the global food market. Awareness of fertigation and chemigation will also be beneficial to a change in the competitive dynamics of very well-known companies, with budding ones for a share in this quickly emerging market.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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