EMEA Secondary Macronutrients - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 130 pages | Mordor Intelligence

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Report description:

The EMEA Secondary Macronutrients Market size is estimated at USD 4.41 billion in 2025, and is expected to reach USD 5.41 billion by 2030, at a CAGR of 4.2% during the forecast period (2025-2030).

Farming practices in EMEA countries have evolved due to increasing consumer demand for high-quality food products. The extensive use of fertilizers has reduced macronutrient levels in soil, as most fertilizers lack these essential elements. While plants need secondary macronutrients in small quantities, these cannot be substituted with primary nutrients. This necessity drives the growth of the secondary macronutrient market in EMEA countries.

Secondary macronutrients, comprising magnesium (Mg), sulfur (S), and calcium (Ca), are essential for crop growth, and their deficiency can impede plant development. Manufacturers produce secondary nutrient fertilizers that offer versatile application methods, including pre-plant, starter, side-dress, and fertigation. In Europe, Germany is a significant producer of rye, oats, potatoes, and fodder beets. According to FAOSTAT, German oat production increased from 721,900 metric tons in 2021 to 754,700 metric tons in 2022. These secondary macronutrients serve multiple agricultural functions, including plant growth optimization, soil fertility enhancement, nutrient level balance, soil pH adjustment, and improved water infiltration and nutrient uptake. The agricultural sector increasingly adopts liquid formulations of these nutrients due to their effectiveness. This trend, combined with rising cereals, fruits, and vegetable production and growing health consciousness in EMEA countries, is driving market growth in the region.

Africa possesses significant agricultural potential, with agriculture being the primary occupation for most of its population. Despite this, the continent remains dependent on food imports. The Feed Africa Strategy aims to increase agricultural production, with enhanced usage of primary and secondary fertilizers, including magnesium-based variants, playing a crucial role. Magnesium fertilizer application has demonstrated measurable yield improvements across various crops: cereal crops increase by 0.2-0.6 metric tons/hectares, potato tubers by 1.5-3 metric tons/hectares, sugar beet root crops by 2-4 metric tons/hectares, corn green mass by 2-6 metric tons/hectares, perennial grass hay by 0.4-0.7 metric tons/hectares, and tea leaves by 0.5-1.0 metric tons/hectares. These documented yield improvements highlight the importance of magnesium fertilizer application in African agriculture.

Moreover, key players in the region are enhancing their product lines by blending elemental sulfur, calcium, and magnesium with other fertilizers to improve yield performance. This development is anticipated to increase the adoption of secondary macronutrients in the region.

EMEA Secondary Macronutrients Market Trends

Rising Production of High-Quality Crops and the Need for Sustainable Agricultural

Agricultural practices in EMEA countries have evolved with increasing consumer preference for high-quality food products. The widespread use of secondary nutrient fertilizers has reduced macronutrient levels in soil, as these fertilizers typically lack essential macronutrients. Plants require all essential nutrients for optimal growth, which drives the demand for secondary macronutrients in the EMEA market. In agriculture, farmers apply magnesium salt as a fertilizer to address soil magnesium deficiency. Cash crop and vegetable farmers particularly rely on magnesium-rich soil to ensure proper crop development. Plant nurseries also show a strong demand for magnesium salt to support potted plant growth. Population growth in EMEA countries, combined with increasing disposable income in developing economies, has led to changes in dietary patterns, driving the EMEA secondary macronutrient market growth.

Secondary macronutrient fertilizers consist of Magnesium (Mg), Sulfur (S), and Calcium (Ca). The deficiency of these nutrients can impair crop growth. These fertilizers are available in liquid form to enhance efficiency and effectiveness. Producers use secondary nutrient fertilizers due to their flexible application options, including pre-plant, starter, side-dress, and fertigation methods. Limestone serves as the primary global source of calcium, while other sources include basic slag, gypsum, hydrated lime, and burned lime. In Europe, the Middle East, and Africa, calcium nitrate, single and triple superphosphate, and gypsum are common calcium fertilizers. Gypsum is particularly essential for groundnut cultivation, which is prevalent in Europe and Africa. According to the Food and Agriculture Organization (FAO), groundnut production in Africa increased from 16.8 million metric tons in 2021 to 17.3 million metric tons in 2022, indicating a potential increase in global gypsum fertilizer demand.

The European market is primarily driven by the extensive use of secondary macronutrient fertilizers in cereal crop production, particularly in France, Germany, and the United Kingdom. The region's increasing health consciousness and rising consumption of plant-based foods support the demand for macronutrients. In 2023, the EU Commission implemented the Farm to Fork Strategy to ensure food security, sustainable food value chains, and effective nutrient management. This strategy focuses on nitrogen, phosphorus, and secondary macronutrients, targeting a 50% reduction in nutrient losses by 2030. Additionally, it aims to reduce fertilizer usage by 20% across European countries while preserving soil fertility. In the UAE, according to the Ministry of Environment and Water (MOEW) and Environmental Agency - Abu Dhabi, the country's soil conditions are among the most challenging globally, which has increased the demand for secondary macronutrients. Consequently, the EMEA secondary macronutrient market is driven by the need to improve crop yields and meet the growing demand for high-value crops, including fruits and vegetables.

Middle East Leads the Market

Middle Eastern countries, including the United Arab Emirates, Saudi Arabia, Kuwait, and Egypt, are import-dependent for food supplies due to unfavorable soil conditions for cultivation. According to the UAE Ministry of Environment and Water (MOEW) and

Environmental Agency - Abu Dhabi, the country's soil is among the most challenging globally for agriculture. These conditions have driven the growth of the secondary macronutrients market in the region.

Saudi Arabia aims to develop its agricultural sector to achieve food security and self-sufficiency. The application of secondary macronutrients to enhance crop growth and yield has become essential for market growth. Saudi Arabia maintains a significant position in global sulfur production, primarily through gas processing operations. Companies like Saf Sulphur Factory produce sulfur-based fertilizers in various forms, including powder, lumps, and granular. The country's substantial production of sulfur and calcium fertilizers has established it as a major exporter. The Food and Agriculture Organization (FAO) statistics indicate that agricultural potassium sulfate usage increased from 4,900 metric tons in 2021 to 5,050 metric tons in 2022. This growth demonstrates the rising demand for secondary macronutrient fertilizers among Saudi Arabian farmers seeking improved crop yields. The combination of increased sulfur production and the focus on food security is projected to drive higher utilization of secondary macronutrients across Middle Eastern countries in the coming years.

EMEA Secondary Macronutrients Industry Overview

The EMEA secondary macronutrient market is fragmented with global players leading the market with a highly diversified product portfolio and several acquisitions and agreements taking place to gain a major share in the industry. Some of the major players in the market include AL-TAYSEER Chemical Industry, Yara International ASA, Eurochem Group AG, K+S Company, and Haifa Group are some of the major players who are operating in the region. The companies are not only competing based on product quality or product promotion but are also focused on other strategic moves, like acquisitions and expansions, to acquire a larger share and expand their acquired market size.

Additional Benefits:

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