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

Market Report | 2025-04-28 | 322 pages | Mordor Intelligence

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Report description:

The Secondary Macronutrients Fertilizer Market size is estimated at 37.81 billion USD in 2025, and is expected to reach 49.28 billion USD by 2030, growing at a CAGR of 5.44% during the forecast period (2025-2030).

The adoption of sulfur fertilizer is more than other secondary macronutrients

- In 2021, sulfur accounted for 42.6% of the global secondary macronutrient fertilizer market. In 2021, the value of the European sulfur market was about USD 1.19 billion. In this market, specialty sulfur fertilizer accounted for a market share of approximately 49.4%, and conventional sulfur fertilizer accounted for about 50.1%. The adoption of specialty sulfur fertilizer is higher than that of other secondary macronutrients. The specialty sulfur fertilizer market is anticipated to reach USD 1.82 billion by the end of the forecast period.
- Magnesium accounted for 48.9% of the global secondary macronutrient fertilizer market in 2021. Field crops accounted for a maximum share of 88.8%, followed by turf and ornamental crops and horticulture crops, holding shares of 3.9% and 7.3%, respectively. The largest fertilizer-consuming crops are wheat and corn, accounting for a total of 40.0% of the land area.
- Calcium recorded 8.4% of the total value of the global secondary macronutrient fertilizer market, accounting for about USD 538.7 million in 2021. The Asia-Pacific region dominated the calcium fertilizer market and accounted for about 41.1% of the global calcium fertilizer market's value, registering USD 221.6 million in 2021. The dominance of the Asia-Pacific region in the calcium fertilizer market is mainly due to the acidification of soils, which means the loss of base cations, such as calcium and magnesium, and replacement with acidic elements, like iron and aluminum complexes.
- The demand for secondary macronutrient fertilizer is anticipated to grow during the forecast period, as the need for higher productivity is increasing due to the decline in the area under the cultivation of crops.

Climate changes and fluctuation in pH levels in soils may drive the market

- Applying secondary macronutrient fertilizers impacts crop yields positively. The demand for calcium, magnesium, and sulfur has risen in tandem with modern high-yield crop systems, underscoring their pivotal role in plant productivity.
- Asia-Pacific dominates the global secondary macronutrient fertilizer market, capturing 39.2% of its value in 2022. Within the region, sulfur claims the majority share at 63.5%, trailed by magnesium at 30.0%. Rice is the major grown cereal crop in Asia-Pacific, with the region accounting for 90% of global production and consumption. Given the region's sulfur-deficient soils, sulfur, a crucial trace element, is supplemented through fertilization to enhance plant growth and yield.
- Europe secured the second-largest share of the global secondary macronutrient fertilizer market in 2022, with a share of 26.9%. Sulfur, commanding a hefty 67.4% of the market's value, emerged as the leading secondary macronutrient fertilizer in 2022. Russia, with a 19.2% market share, emerged as the dominant player in Europe's market landscape.
- In 2022, the South American secondary macronutrient fertilizer market held an 11.5% share of the global market. Recent droughts and heat waves disrupted nutrient availability in the region's soils, driving up the adoption of secondary macronutrient fertilizers to counteract these deficiencies.
- Secondary macronutrients play a pivotal role in maintaining balanced plant nutrition, with each nutrient influencing specific metabolic processes. This dynamic is poised to fuel the growth of the market in the coming years as the importance of optimized plant nutrition becomes increasingly recognized.

Global Secondary Macronutrients Fertilizer Market Trends

The rising pressure on the agriculture sector to meet the growing demand for food is expected to increase the area under field crop cultivation

- The global agricultural sector is currently facing many challenges. According to the United Nations, the world population may exceed 9 billion by 2050. This population growth may overburden the agricultural sector, which is already experiencing an output loss due to a lack of laborers and the shrinkage of agricultural fields caused by rising urbanization. According to the Food and Agriculture Organization, 70% of the global population is expected to live in cities by 2050. Due to the global loss of arable land, farmers now need to utilize more fertilizers to increase crop yields.
- Asia-Pacific is the world's largest producer of agricultural products. Agriculture is critical to the region's economy, as it employs about 20% of the total available workforce. Field crop cultivation dominates the region, accounting for more than 95% of the total crop area. Rice, wheat, and corn are the major field crops produced in the region, together accounting for about 24.3% of the total crop area in 2022.
- North America ranks as the second-largest arable region across the world. Its farms cultivate a diverse range of crops, with a focus on field crops. Notably, corn, cotton, rice, soybean, and wheat are the prominent field crops, as highlighted by the USDA. In 2022, the United States commanded 46.2% of North America's crop cultivation area. However, the country witnessed a significant drop in crop acreage between 2017 and 2019, primarily due to adverse environmental conditions, leading to severe flooding in regions like Texas and Houston.

A?steady supply of sulfur is required from early growth stages until harvest as it is immobile in plants, and any shortage in supply can limit the yield

- The global average application rate of secondary macronutrients in field crops was 33.73 kg/ha in 2022. In the same year, the calcium application rate was about 39.20 kg/hectare, magnesium was about 34.51 kg/hectare, and sulfur application rate was 27.47 kg/hectare. Calcium aids in the absorption of other essential nutrients. Magnesium is an excellent enzyme activator that promotes plant growth and flowering. Plants require only a small amount of secondary macronutrients that cannot be replaced by any primary nutrients.
- In 2022, corn/maize recorded the highest average sulfur application rate of 34.33 kg/ha, followed by cotton at 29.72 kg/ha and rapeseed/canola at 27.57 kg/ha. A steady supply of sulfur is required from early growth stages until harvest as it is immobile in plants. At any stage of growth, a shortage of sulfur can lead to lower yields. As N, P, and K requirements have mostly been met, deficits of other nutrients have started to appear. Sulfur is the fourth most crucial nutrient after N, P, and K but is usually only needed in low quantities.
- South America, the Middle East & Africa, and Asia-Pacific were the major consumers of secondary macronutrients, with the highest average nutrient application rates, accounting for 39.27 kg/ha, 32.79 kg/ha, and 32.74 kg/ha, respectively, in 2022. Growers acknowledged the importance of secondary macronutrients because they are crucial nutrients for plants, support stronger cell walls, lower bruising, and prevent disease in field crops. Although secondary macronutrients are less yield-limiting than primary macronutrients, crops need them at a rate that will optimize productivity.

Secondary Macronutrients Fertilizer Industry Overview

The Secondary Macronutrients Fertilizer Market is fragmented, with the top five companies occupying 10.61%. The major players in this market are ICL Group Ltd, K+S Aktiengesellschaft, Koch Industries Inc., The Mosaic Company and Yara International ASA (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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