

Global Complex Fertilizers Market Size Study & Forecast, by Type (Incomplete and Complete) by Form (Solid and Liquid) and Regional Forecasts 2025-2035

<https://marketpublishers.com/r/G1A018E191F4EN.html>

Date: June 2026

Pages: 285

Price: US\$ 3,750.00 (Single User License)

ID: G1A018E191F4EN

Abstracts

Market Definition and Overview

The Global Complex Fertilizers Market is valued at approximately USD 57.4 billion in 2024 and is anticipated to expand at a CAGR of about 6.20% throughout the forecast period of 2025-2035. Complex fertilizers—often engineered through the strategic blending of essential nutrients such as nitrogen, phosphorus, and potassium—have become critical in modern agriculture as farmers strive to maximize yields and sustain soil health. These multifunctional fertilizers streamline nutrient delivery, enhance absorption efficiency, and minimize application costs, enabling growers to keep up with the surging global demand for food. Market growth is being steered by rising population-driven consumption patterns, expanding commercial farming, and a shift toward nutrient-dense, precision-based agricultural inputs.

Increasing efforts to improve crop productivity have driven agricultural producers to lean toward complex fertilizers that consolidate nutrients and simplify application cycles. As agricultural land becomes more constrained, farmers across emerging and developed economies alike are deploying high-performance fertilizers to unlock higher per-acre yields. The growing emphasis on sustainable agricultural practices, ongoing R&D in nutrient-release technology, and investments into smarter soil-conditioning inputs are fostering lucrative opportunities for market players. Nevertheless, fluctuating raw material prices and growing adoption of organic alternatives may act as subtle barriers to growth during the forecast years.

The detailed segments and sub-segments included in the report are:

By Type:

Incomplete

Complete

By Form:

Solid

Liquid

By Region:

North America

U.S.

Canada

Europe

UK

Germany

France

Spain

Italy

ROE

Asia Pacific

China

India

Japan

Australia

South Korea

RoAPAC

Latin America

Brazil

Mexico

Middle East & Africa

UAE

Saudi Arabia

South Africa

Rest of Middle East & Africa

Segment Insights

Incomplete Fertilizers are Expected to Dominate the Market

Incomplete complex fertilizers, known for their flexibility and cost-efficient nutrient composition, are projected to dominate the market share over the forecast period. Their widespread use stems from the ability to precisely tailor nutrient ratios to individual crop requirements, allowing farmers to adjust fertilization programs in line with shifting soil

conditions and crop rotations. As producers across Asia, Latin America, and Africa expand cereal and horticulture production, the demand for nutrient-specific feeding solutions has rapidly escalated—pushing incomplete fertilizers into the leading position. Meanwhile, complete fertilizers, although highly efficient, are anticipated to gain momentum due to expanding adoption among technologically advanced farming systems.

Solid Fertilizers Lead in Revenue Contribution

Among form segments, solid complex fertilizers currently capture the largest revenue share, primarily due to their longer shelf life, ease of handling, and suitability for broad-acre crops. Their consistent performance and compatibility with traditional farming machinery have further solidified their uptake. Liquid fertilizers, however, are poised to emerge as the fastest-growing category, supported by the proliferation of fertigation systems, drip irrigation expansion, and the rising popularity of precision agriculture. This evolving landscape underscores the market's dual trend: solids dominate in volume and reach, while liquids accelerate in adoption due to high-efficiency, controlled-release benefits.

Regional Insights

The key regions analyzed in the Global Complex Fertilizers Market include North America, Europe, Asia Pacific, Latin America, and the Middle East & Africa. Asia Pacific currently leads the global landscape, underpinned by its vast arable land, intensive crop cycles, and mounting food consumption patterns driven by population growth in India, China, and Southeast Asia. Structural improvements in irrigation, government-backed fertilizer subsidies, and the accelerated mechanization of agriculture have further stimulated demand across the region. North America, characterized by technologically advanced farming and strong emphasis on high-yield crop varieties, maintains a substantial market share. Europe, with its policy-driven commitment to sustainable agriculture and soil rejuvenation, continues to adopt complex fertilizers at a steady pace. Emerging economies across Latin America and the Middle East & Africa offer untapped potential fueled by expanding agricultural modernization initiatives and investments aimed at reducing import dependency.

Major market players included in this report are:

Yara International ASA

Haifa Group

EuroChem Group

Nutrien Ltd.

The Mosaic Company

Coromandel International

CF Industries Holdings, Inc.

OCP Group

PhosAgro

ICL Group Ltd.

Koch Industries, Inc.

K+S Aktiengesellschaft

SQM (Sociedad Química y Minera)

Uralchem

Wilbur-Ellis Company

Global Complex Fertilizers Market Report Scope:

Historical Data – 2023, 2024

Base Year for Estimation – 2024

Forecast period – 2025-2035

Report Coverage – Revenue forecast, Company Ranking, Competitive Landscape, Growth factors, and Trends

Regional Scope – North America; Europe; Asia Pacific; Latin America; Middle East & Africa

Customization Scope – Free report customization (equivalent to up to 8 analysts' working hours) with purchase. Addition or alteration to country, regional & segment scope*

The objective of the study is to define market sizes of different segments & countries in recent years and to forecast the values for the coming years. The report is designed to incorporate both qualitative and quantitative aspects of the industry within the countries involved in the study. The report also provides detailed information about crucial aspects, such as driving factors and challenges, which will define the future growth of the market. Additionally, it incorporates potential opportunities in micro-markets for stakeholders to invest, along with a detailed analysis of the competitive landscape and product offerings of key players. The detailed segments and sub-segments of the market are explained below:

Key Takeaways:

Market Estimates & Forecast for 10 years from 2025 to 2035.

Annualized revenues and regional-level analysis for each market segment.

Detailed analysis of the geographical landscape with country-level analysis of major regions.

Competitive landscape with information on major players in the market.

Analysis of key business strategies and recommendations on future market approach.

Analysis of the competitive structure of the market.

Demand side and supply side analysis of the market.

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