

Global Water-Soluble Fertilizers Market Size Study and Forecast by Type (Nitrogenous, Phosphatic, Potassic, Others), By Application (Foliar, Fertigation), By Crop Type (Field Crop, Horticulture, Turf & Ornamentals, Others), and Regional Forecasts 2026–2036

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Abstracts

Global Water-Soluble Fertilizers Market Definition and Scope

The Global Water-Soluble Fertilizers Market valued at USD 20.08 billion in 2025 is anticipated to reach USD 43.91 billion by 2036, growing at 6.9% CAGR during the forecast period. With growing emphasis on resource efficiency, crop productivity, and precision nutrient management in agricultural systems, the market's strategic importance has grown. Water-soluble fertilizers have evolved from niche agricultural inputs to mainstream crop nutrition solutions within commercial farming operations. Growing concerns about soil degradation, shrinking arable land availability, and water scarcity have further fueled adoption. Agricultural producers are increasingly shifting towards nutrient delivery systems that improve absorption efficiency and reduce nutrient losses. This shift has led to increased demand for water-soluble formulations in high-value crops, protected cultivation systems, and intensive farming environments.

Global Water-Soluble Fertilizers Market: Key Highlights

The Global Water-Soluble Fertilizers Market was valued at USD 20.86 billion in 2025, primarily driven by increasing adoption of efficient nutrient management practices in modern agriculture.

The market is projected to reach USD 43.91 billion by 2036, growing at a CAGR of 6.9% during 2026–2036, propelled by expanding implementation of precision farming and micro-irrigation technologies.

Asia Pacific leads the global market, supported by intensive agricultural production and widespread government initiatives promoting sustainable farming practices.

Nitrogenous fertilizers dominate the type segment because of their essential role in promoting vegetative growth and improving crop productivity.

Fertigation leads the application segment owing to its ability to deliver nutrients precisely, enhance fertilizer efficiency, and reduce nutrient losses.

Field Crop dominates the crop type segment because of extensive cultivation areas and consistent demand for high-yield nutrient management solutions.

Research Scope and Methodology

The Global Water-Soluble Fertilizers Market report provides insights into nutrient formulations, application technologies, crop-wise adoption trends, and regional demand dynamics. It evaluates commercial opportunities in nitrogenous, phosphatic, potassic, and specialty fertilizer segments. The study analyzes applications in fertigation and foliar feeding systems and assesses adoption across field crops, horticulture, and ornamental cultivation. The report explores supply chain structures, technological innovations, regulatory frameworks, investment patterns, and competitive developments impacting market performance. Stakeholders include manufacturers, distributors, irrigation technology providers, agricultural input suppliers, commercial growers, and policymakers.

The study employs a combination of primary and secondary research to provide a comprehensive understanding of market dynamics. Primary research includes interviews with fertilizer manufacturers, agronomists, agricultural technology providers, distributors, and commercial growers in key agricultural regions. Secondary research sources include industry publications, government databases on agriculture, trade association reports, company annual reports, regulatory documents, and initiatives for agricultural development. Market estimates take into account production trends, consumption data, pricing trends, trade movements, and crop cultivation data.

Key Market Segments

By Type

Nitrogenous

Phosphatic

Potassic

Others

By Application

Foliar

Fertigation

By Crop Type

Field Crop

Horticulture

Turf & Ornamentals

Others

Key Market Players

Yara

The Mosaic Company

ICL.

SQM SA

Haifa Negev technologies LTD

EuroChem Group

Coromandel International Ltd

IFFCO

CF Industries Holdings, Inc.

OCP Group S. A

Industry Trends

The global water-soluble fertilizers market is undergoing rapid transformation as precision agriculture reshapes nutrient management practices. Farmers are increasingly adopting sensors, satellite monitoring systems, and data-driven farm management platforms to optimize fertilizer application schedules. Water-soluble fertilizers are well suited to these precision farming technologies, enabling accurate nutrient delivery while improving crop productivity and input efficiency.

Expansion of fertigation infrastructure remains a major industry trend. The growing adoption of drip irrigation in water-stressed agricultural regions is increasing demand for fertilizers compatible with precise irrigation systems. According to the Food and Agriculture Organization (FAO), agriculture accounts for nearly 70% of global freshwater withdrawals, reinforcing the need for efficient irrigation and nutrient management solutions. Water-soluble fertilizers support these objectives by delivering nutrients directly to plant root zones while minimizing water and fertilizer losses.

Greenhouse cultivation continues to expand across Europe, Asia Pacific, and North America, creating sustained demand for water-soluble fertilizers. Controlled environment agriculture depends on highly soluble nutrient formulations that enable accurate nutrient management throughout crop growth

cycles. Commercial greenhouse operators are increasingly seeking customized fertilizer formulations to maximize yields, improve crop quality, and maintain consistent production.

Sustainability objectives are accelerating fertilizer innovation. Manufacturers are investing in enhanced-efficiency nutrient formulations designed to improve nutrient-use efficiency while reducing environmental losses through leaching and runoff. Micronutrient-enriched fertilizers and advanced specialty formulations are gaining commercial traction as growers prioritize sustainable productivity.

Digital agriculture platforms are becoming integral to nutrient management decisions. Modern farm management systems increasingly combine weather forecasting, soil testing, irrigation scheduling, and fertilizer recommendations into unified digital platforms. These technologies are strengthening demand for highly soluble fertilizers that integrate seamlessly with automated fertigation systems.

Specialty crop cultivation continues to emerge as an important growth driver. Rising global consumption of fruits, vegetables, nuts, and export-oriented horticultural crops is encouraging growers to adopt premium nutrient management solutions. Producers increasingly prioritize crop quality, shelf life, and yield consistency, supporting wider adoption of water-soluble fertilizers.

Micronutrient integration has become another defining market trend. Deficiencies of zinc, boron, iron, magnesium, and other essential micronutrients continue to constrain crop productivity across many agricultural regions. In response, fertilizer manufacturers are increasingly developing balanced formulations that combine primary nutrients with essential micronutrients to improve crop performance.

Government support for agricultural modernization is further stimulating market growth. Subsidies promoting micro-irrigation systems and efficient water management practices are encouraging greater adoption of fertigation-compatible fertilizers. These initiatives strengthen the long-term outlook for water-soluble fertilizer demand across both developed and emerging agricultural markets.

Supply chain diversification is becoming a strategic priority throughout the

industry. Manufacturers are expanding regional production facilities to improve supply reliability, reduce transportation costs, and respond more effectively to changing agricultural demand patterns. Localized manufacturing also enhances resilience against global supply chain disruptions.

Climate variability continues to reinforce demand for precision nutrient management solutions. Increasingly unpredictable weather conditions are encouraging growers to maximize productivity per hectare while maintaining efficient resource utilization. Water-soluble fertilizers provide the flexibility to rapidly adjust nutrient programs in response to changing environmental conditions, improving crop resilience.

Research and development investments are increasingly focused on crop-specific fertilizer formulations. Manufacturers are developing customized nutrient blends tailored to the unique nutritional requirements of individual crops, helping improve productivity, quality, and resource efficiency. This trend is expected to remain a major source of innovation and competitive differentiation throughout the forecast period.

Market Determinants

Rising Adoption of Precision Agriculture: Precision agriculture improves nutrient management efficiency and enhances productivity. Water-soluble fertilizers support targeted nutrient delivery, making them critical inputs for data-driven farming systems. Commercial adoption continues increasing as growers pursue higher yields and improved profitability.

Expansion of Micro-Irrigation Infrastructure: Growing investment in drip and sprinkler irrigation systems creates favorable conditions for fertigation-compatible fertilizers. Improved water-use efficiency strengthens the commercial case for soluble nutrient formulations across water-constrained agricultural regions.

Growth of High-Value Crop Production: Horticulture and specialty crop producers require precise nutrient management. Water-soluble fertilizers improve crop quality, consistency, and export competitiveness. This demand trend supports premium product adoption.

Supportive Agricultural Policies: Governments increasingly promote sustainable farming practices and efficient resource utilization. Subsidies supporting irrigation modernization and precision farming technologies indirectly stimulate water-soluble fertilizer consumption.

Volatility in Raw Material Prices: Fertilizer production depends on key raw materials subject to pricing fluctuations. Supply disruptions and energy cost increases can pressure manufacturer margins and influence product affordability.

Limited Awareness Among Smallholders: Many small-scale farmers remain unfamiliar with advanced nutrient management practices. Knowledge gaps and upfront investment requirements may constrain adoption in certain developing agricultural markets.

Opportunity Mapping Based on Market Trends

Expansion of Protected Cultivation: Greenhouses and controlled environment agriculture require precise nutrient management systems. Water-soluble fertilizers are positioned to benefit significantly from this expanding cultivation model.

Customized Crop-Specific Nutrition: Manufacturers can develop tailored nutrient formulations targeting fruits, vegetables, floriculture, and specialty crops. Product differentiation creates opportunities for premium pricing.

Emerging Market Penetration: Agricultural modernization initiatives across Asia, Africa, and Latin America present substantial growth opportunities. Rising investment in irrigation infrastructure supports market expansion.

Digital Agronomy Integration: Integration with precision agriculture platforms enables value-added services. Companies offering nutrient products alongside agronomic recommendations can strengthen customer retention and profitability.

Value-Creating Segments and Growth Pockets

Nitrogenous fertilizers lead the type segment due to their widespread use in staple crop

cultivation, established production capacity, and extensive distribution networks.

The market is segmented into Nitrogenous, Phosphatic, Potassic, and Others.

Nitrogenous fertilizers currently dominate the market with an estimated share of 52.4% in 2025. The dominance is attributed to the prevalent crop requirements, established production capacity, lower production costs, strong distribution networks, and extensive utilization across cereal cultivation. Commercial deployment is strongest in staple crop farming where nitrogen directly impacts productivity.

Potassic fertilizers are estimated to record the fastest CAGR of 14.8% during the forecast period 2026-2036. The future growth is underpinned by growing horticulture cultivation, quality-oriented crop production, climate resilience requirements, and increasing awareness about balanced nutrient management.

Fertigation dominates the application segment through growing adoption of drip irrigation, superior nutrient-use efficiency, and compatibility with precision farming systems

The market is segmented into Foliar and Fertigation. Currently, Fertigation dominates the market with an estimated 64.7% share in 2025. Leadership is attributed to increasing adoption of drip irrigation, better utilization efficiency of nutrients, low labor requirements, compatibility with precision farming systems, and robust policy support for micro-irrigation deployment. Foliar application is expected to register the fastest CAGR of 13.9% during 2026-2036. Growth acceleration is supported by rapid nutrient correction abilities, increasing applications of micronutrients, specialty crops demand, and growing adoption among commercial horticulture producers.

Field crops lead the crop type segment due to extensive cultivation areas, high fertilizer consumption, and strong government support for food production.

The market is segmented into Field Crop, Horticulture, Turf & Ornamentals, and Others. The Field Crop segment is expected to dominate the crop segment and is expected to have a market share of 58.1% by 2025. The segment is driven by a large area of cultivation, high fertilizer consumption, food security concerns, government support programs and widespread commercial adoption. Horticulture is expected to register the highest CAGR of 16.3% during 2026–2036. The momentum of investments is increasingly moving towards horticulture, driven by export opportunities, higher crop value realization, expansion of protected cultivation and increasing consumer demand for fruits and vegetables.

Regional Market Assessment

North America maintains a strong water-soluble fertilizers market through advanced precision farming technologies, irrigation modernization, and data-driven nutrient management practices.

North America maintains a strong market position supported by advanced agricultural technologies, widespread precision farming adoption, and significant investment in irrigation modernization. Commercial farms increasingly deploy data-driven nutrient management systems to maximize productivity. Strong research capabilities and extensive agronomic support services accelerate adoption of innovative fertilizer products. Greenhouse cultivation expansion and increasing specialty crop production further support market growth. Sustainability objectives encourage efficient fertilizer utilization, strengthening demand for water-soluble nutrient solutions.

Europe strengthens its water-soluble fertilizers market through stringent environmental regulations, sustainable nutrient management practices, and high-value horticultural production.

Strict environmental laws in Europe foster efficient nutrient management practices. Agricultural sustainability policies incentivize use of technologies that reduce nutrient losses and enhance resource efficiency. Greenhouse cultivation is well-developed in multiple European economies. High emphasis on quality horticultural production drives demand for premium fertilizers. Innovation in specialty nutrient formulations continues to enhance market competitiveness and long-term growth prospects.

Asia Pacific dominates the global water-soluble fertilizers market due to large-scale agricultural production, expanding irrigation infrastructure, and rising government support for agricultural productivity.

Asia Pacific is expected to dominate the global market with an estimated share of 43.6% in 2025. The region's dominance is driven by large agricultural activities, increasing food demand due to population growth, increasing irrigation infrastructure, and increased government investment in the enhancement of agricultural productivity. China and India, among other countries, are promoting the efficient use of fertilizer and micro-irrigation. The growth of horticulture exports and greenhouse cultivation strengthens commercial opportunities. Large-scale farming modernization programs support long-term market growth.

LAMEA is the fastest-growing regional market, driven by expanding irrigated agriculture, increasing food security investments, and rising adoption of precision farming technologies.

LAMEA is expected to register the fastest CAGR of 15.8% during 2026–2036. Growth acceleration is supported by expanding irrigated agriculture, increasing investment in food security initiatives, rising adoption of modern farming technologies, and favorable agricultural development programs. Middle Eastern countries continue investing in controlled environment agriculture, while Latin American producers increasingly adopt precision nutrient management systems. Export-oriented crop cultivation strengthens regional demand prospects.

Recent Developments

March 2025: Yara International expanded specialty crop nutrition initiatives across key agricultural markets. The development strengthens the company's position in high-value horticulture and reflects growing demand for precision nutrient management solutions.

November 2024: ICL Group introduced advanced water-soluble fertilizer formulations targeting greenhouse cultivation. The launch supports controlled environment agriculture growth and highlights increasing product customization trends.

July 2024: Haifa Group expanded production capabilities for specialty fertilizers. The investment improves supply chain resilience and supports rising global demand for fertigation-compatible products.

February 2025: SQM International strengthened specialty plant nutrition operations through portfolio expansion initiatives. The move reflects increasing focus on high-efficiency crop nutrition solutions.

Critical Business Questions Addressed

What is the long-term value creation potential of the water-soluble fertilizers market?

The report evaluates revenue expansion opportunities, technology adoption patterns,

and investment trends shaping future market growth.

Which segments offer the strongest commercial returns?

The analysis identifies dominant segments, emerging growth pockets, and strategic investment priorities across types, applications, and crop categories.

Which regional markets should stakeholders prioritize?

The report highlights regional demand drivers, policy environments, infrastructure readiness, and competitive dynamics influencing investment decisions.

How will precision agriculture influence market evolution?

The study assesses the impact of digital farming technologies, fertigation systems, and automated nutrient management platforms.

What competitive strategies are likely to succeed?

The report evaluates product innovation, regional expansion, supply chain localization, and customized nutrition solutions as key competitive differentiators.

Beyond the Forecast

Water-soluble fertilizers are transitioning from specialty agricultural inputs to foundational components of precision farming ecosystems.

Competitive advantage will increasingly depend on formulation innovation, digital agronomy integration, and crop-specific nutrient solutions rather than production scale alone.

The next phase of market evolution will favor companies capable of aligning sustainability objectives, productivity gains, and precision nutrient delivery within a unified agricultural value proposition.

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