

# **Controlled Release Fertilizer Market Report by Type (Condensation Products of Urea and Aldehydes, Coated and Encapsulated Fertilizers, and Others), Form (Granular, Liquid, Powder), Application (Grains and Cereals, Pulses and Oilseeds, Commercial Crops, Fruits and Vegetables, Turf and Ornamentals, and Others), and Region 2024-2032**

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## **Abstracts**

The global controlled release fertilizer market size reached US\$ 3.1 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 5.0 Billion by 2032, exhibiting a growth rate (CAGR) of 5.3% during 2024-2032. There are various factors that are driving the market, which include the rising adoption of modern agricultural practices like precision farming, integrated pest management, and sustainable farming techniques, increasing demand for a variety of food products, and various collaborations and partnerships among industry players.

Controlled Release Fertilizer Market Analysis:

**Major Market Drivers:** One of the key market drivers includes favorable government initiatives. Moreover, there is an increase in the focus on maintaining environmental sustainability, which is acting as another growth-inducing factor.

**Key Market Trends:** The rising adoption of modern agricultural practices and increasing demand for a variety of food products are main trends in the market.

**Geographical Trends:** North America exhibits a clear dominance, accounting for

the biggest market share owing to the rapid adoption of advanced agricultural technologies.

**Competitive Landscape:** Major market players in the controlled release fertilizer industry are AGLUKON Spezialduenger GmbH & Co. KG, COMPO Expert GmbH (Grupa Azoty S.A.), DeltaChem GmbH, Haifa Group, ICL Group Ltd., JNC Corporation, Kingenta Ecological Engineering Co. Ltd., Mivena BV, Nufarm, Sociedad Qu?mica y Minera de Chile S.A., The Mosaic Company, Yara International ASA., among many others.

**Challenges and Opportunities:** Limited awareness among farmers represents a key market challenge. Nonetheless, advancements in coating technologies, coupled with the rising development of crop-specific formulations, are projected to overcome these challenges and provide market opportunities to industry investors.

## Controlled Release Fertilizer Market Trends:

### Rising Adoption of Modern Agriculture Practices

The need for controlled release fertilizers (CRFs) is being driven by the growing use of modern agricultural practices. Precision farming, integrated pest management, and sustainable farming methods are examples of modern agricultural practices. Global positioning systems (GPS), remote sensing, and data analytics are some of the technologies used in precision farming to maximize fertilizer application. CRFs are particularly well-suited for precision farming as they provide a steady nutrient supply, reducing the need for frequent applications and ensuring that nutrients are available when crops need them the most. In addition, CRFs help farmers maximize efficiency and minimize waste by aligning nutrient release with crop needs. This leads to cost savings on fertilizers and potentially higher crop yields due to improved nutrient management. The research report of the IMARC Group claims that the global precision agriculture market is expected to reach US\$ 20.2 Billion by 2032.

### Growing Demand for A Variety of Food Products

The Food and Agriculture Organization (FAO) of the United Nations (UN) reports that cereal production increased by 7.9 million tons in July of 2024 worldwide. The rising demand for a variety of food products due to changing dietary patterns of individuals is

propelling the controlled release fertilizer market growth. Farmers are increasing crop yields and improving the quality of their products in order to satisfy the growing demand for a variety of food products among consumers. CRFs play a critical role in promoting plant growth and productivity by supplying a steady and accurate amount of nutrients. These fertilizers ensure that crops receive the nutrients they require at the right time by reducing nutrient losses and optimizing nutrient uptake. These fertilizers can also be customized to deliver particular nutrients that are necessary for the development of different crops. This customization helps in producing food with higher nutritional value.

### Increasing Collaborations and Partnerships Among Key Players

The industry is growing as a result of several partnerships, collaborations, contracts, and mergers and acquisitions (M&As). Companies can strengthen their presence through these strategic alliances, thereby leading to the creation of creative and effective CRFS. Top players are also forming alliances or purchasing businesses in other regions. This regional diversification guarantees a larger consumer base and reduces the risks related to market volatility in particular locations. Besides this, they are entering into several contracts to commercialize their products. For instance, on 14 June 2024, Nousbo signed a Memorandum of Understanding (MOU) with SK leaveo at SKC's headquarters for the commercialization of its eco-friendly CRF. Additionally, Nousbo plans to utilize its expertise in planning, production, and marketing strategies to align with global fertilizer market trends.

### Controlled Release Fertilizer Market Segmentation:

IMARC Group provides an analysis of the key trends in each segment of the market, along with forecasts at the global, regional, and country levels for 2024-2032. Our report has categorized the market based on type, form, and application.

#### Breakup by Type:

- Condensation Products of Urea and Aldehydes

  - Urea Formaldehyde (UF)

  - Isobutylidenediurea

  - Crotonylidenediurea

Coated and Encapsulated Fertilizers

Sulfur-coated Fertilizers

Polymer-coated Fertilizers

Sulfur-polymer Coated Fertilizers

Others

Others

Coated and encapsulated fertilizers account for the majority of the market share

The report has provided a detailed breakup and analysis of the market based on the type. This includes condensation products of urea and aldehydes [urea formaldehyde (UF), isobutylidenediurea, and crotonylidenediurea], coated and encapsulated fertilizers (sulfur-coated fertilizers, polymer-coated fertilizers, sulfur-polymer coated fertilizers, and others), and others. According to the report, coated and encapsulated fertilizers represented the largest segment.

Coated and encapsulated fertilizers are coated with polymers or other materials that enable the nutrients to be released gradually over time as to meet the growth requirements of the plants. This technique is beneficial in enhancing nutrient usage efficiency by lowering nutrient loss from leaching and volatilization. Besides this, the rising focus on optimizing crop yield and maintaining sustainability is supporting the market growth.

Breakup by Form:

Granular

Liquid

Powder

A detailed breakup and analysis of the market based on the form have also been

provided in the report. This includes granular, liquid, and powder.

Granular fertilizers are among the most popular form of fertilizers because of their simplicity of application and progressive release of nutrients. They are widely used in large-scale farming operations and can be applied mechanically.

Liquid fertilizers offer precise dosing and are easily absorbed by plants. Both foliar feeding and fertigation can be done using these fertilizers. They are gaining traction in high-value crops where precision and rapid uptake of nitrogen are essential such as fruits and vegetables.

Powder fertilizers are utilized in greenhouse and nursery environment because they are easily absorbed in water and applied via irrigation systems. They offer versatility in nutritional formulation and rates of application. They are useful in regulated settings where particular nutrients are closely managed.

Breakup by Application:

Grains and Cereals

Pulses and Oilseeds

Commercial Crops

Fruits and Vegetables

Turf and Ornamentals

Others

The report has provided a detailed breakup and analysis of the market based on the application. This includes grains and cereals, pulses and oilseeds, commercial crops, fruits and vegetables, turf and ornamentals, and others.

Due to the increased need for staple food items like wheat, rice, and corn, the grains and cereals segment plays a vital role. Consistent fertilizer input from CRFs improves quality and yield. The market segment is expanding owing to consumers' growing demand for premium food products.

Pulses and oilseeds require specific nutrients at different growth stages. CRFs ensure these crops receive the necessary nutrients in a timely manner, improving productivity and quality. Farmers are increasingly adopting these fertilizers to optimize the yield and quality of crops like soybeans, peanuts, and lentils.

Commercial crops such as cotton, sugarcane, and tobacco are high-value crops that benefit significantly from controlled release fertilizers. The use of CRFs in commercial crops contributes to higher economic returns due to improved crop performance and quality.

#### Breakup by Region:

North America

United States

Canada

Asia-Pacific

China

Japan

India

South Korea

Australia

Indonesia

Others

Europe

Germany

France

United Kingdom

Italy

Spain

Russia

Others

Latin America

Brazil

Mexico

Others

Middle East and Africa

North America leads the market, accounting for the largest controlled release fertilizer market share

The report has also provided a comprehensive analysis of all the major regional markets, which include North America (the United States and Canada); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, North America represents the largest regional market for controlled release fertilizer.

According to the U.S. Department of Agriculture (USDA), agriculture, food, and related industries contributed around US\$ 1.530 Trillion to U.S. gross domestic product (GDP) in 2023. The increasing demand for high-quality agricultural products including grains, fruits, and vegetables among individuals in the North American region is impelling the market growth. In addition, North America, particularly the United States and Canada, is at the forefront of adopting advanced agricultural technologies and practices. This

includes the extensive use of precision farming techniques, which optimize the application of fertilizers and enhance crop yields. Furthermore, stringent environmental regulations in North America mandate the reduction of nutrient runoff and pollution.

#### Competitive Landscape:

The market research report has also provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the major market players in the controlled release fertilizer industry include AGLUKON Spezialduenger GmbH & Co. KG, COMPO Expert GmbH (Grupa Azoty S.A.), DeltaChem GmbH, Haifa Group, ICL Group Ltd., JNC Corporation, Kingenta Ecological Engineering Co. Ltd., Mivena BV, Nufarm, Sociedad Qu?mica y Minera de Chile S.A., The Mosaic Company, and Yara International ASA.

(Please note that this is only a partial list of the key players, and the complete list is provided in the report.)

Top players are engaging in various strategies to strengthen their market position. They are expanding their operations in emerging markets by establishing new production facilities. They are focusing on developing new fertilizer formulations that provide more efficient nutrient release, addressing the specific needs of different crops. They are also investing in research and development (R&D) efforts that assist in creating products that improve crop yield and reduce environmental impact. For example, on 15 September 2023, ICL introduced eqo.x, a pioneering controlled release fertilizer (CRF) technology, which is a first-of-its-kind biodegradable coating for CRFs, specifically designed for open-field agriculture. It has an impressive nutrient use efficiency (NUE).

#### Controlled Release Fertilizer Market News:

January 2023: Mivena announced the Durable CRF technology at the global horticultural trade fair IPM Essen, Mivena booth 3A82. It also stated that CRF brands are now based on the renewed unique low start and high-end release technology 'Durable CRF'. The technology is biodegradable and is the most robust CRF technology. It also has biodegradable coating, unique low start and high-end release, no swelling and leaking pellets. Moreover, it has round and



small 2-3mm pellets and no exponential release at higher temperatures.

#### Key Questions Answered in This Report:

How has the global controlled release fertilizer market performed so far, and how will it perform in the coming years?

What are the drivers, restraints, and opportunities in the global market?

What is the impact of each driver, restraint, and opportunity on the global market?

What are the key regional markets?

Which countries represent the most attractive market?

What is the breakup of the market based on the type?

Which is the most attractive type in the market?

What is the breakup of the market based on the form?

Which is the most attractive form in the market?

What is the breakup of the market based on the application?

Which is the most attractive application in the market?

What is the competitive structure of the market?

Who are the key players/companies in the global controlled release fertilizer market?

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Figure 82: Global: Controlled Release Fertilizer Industry: Value Chain Analysis

Figure 83: Global: Controlled Release Fertilizer Industry: Porter's Five Forces Analysis

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