

# Fertilizer Market Report by Product Type (Chemical Fertilizer, Biofertilizers), Product (Straight Fertilizers, Complex Fertilizers), Product Form (Dry, Liquid), Crop Type (Grains and Cereals, Pulses and Oilseeds, Fruits and Vegetables, Flowers and Ornamentals, and Others), and Region 2024-2032

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## Abstracts

The global fertilizer market size reached US\$ 176.4 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 236.9 Billion by 2032, exhibiting a growth rate (CAGR) of 3.2% during 2024-2032. The burgeoning population expansion, surging food demand, economic development in emerging markets, rising income levels, government policies and subsidies, rising research and development (R&D) activities, and rapid advancements in agricultural technology are some of the factors supporting the market growth.

Fertilizer is a vital agricultural input that enhances soil fertility and promotes healthy plant growth. It is formulated from natural and synthetic components through a process known as fertilization. During fertilization, essential nutrients, such as nitrogen, phosphorus, and potassium, are combined in precise ratios to create balanced formulas. They offer several advantages, including increased crop yields, improved nutrient content in produce, and efficient resource utilization. There are two primary types of fertilizers: organic and inorganic (synthetic). Organic fertilizers are derived from natural sources like animal manure, compost, and plant residues. In contrast, synthetic fertilizers are manufactured chemically, allowing for precise nutrient composition.

The global fertilizer market is influenced by burgeoning population growth, which has increased the demand for food and subsequently driven the demand for fertilizers to

enhance agricultural productivity. Moreover, economic development and rising incomes levels stimulate higher consumption of fertilizers for improved crop yields, which is supporting the market growth. Additionally, government policies and subsidies positively impact fertilizer usage and production, which is fueling the market growth. Furthermore, advancements in agricultural technology and precision farming practices encourage efficient fertilizer utilization, which, in turn, is boosting the market growth. In line with this, the surging climate change and its impact on crop patterns and soil conditions has increased the adoption of specific fertilizers, further facilitating the market growth.

#### Fertilizer Market Trends/Drivers:

##### Population growth and increased food demand

The rapid growth of the global population has been a significant driver in the fertilizer market. As more people inhabit the planet, the demand for food rises accordingly. To meet the increasing food needs, farmers strive to enhance agricultural productivity and crop yields. Fertilizers play a crucial role in this context, as they provide essential nutrients to the soil, promoting healthier plant growth and maximizing harvests. With a burgeoning global population, the agricultural sector faces the challenge of producing more food using limited arable land. As a result, the demand for fertilizers continues to surge to boost crop productivity and ensure food security.

##### Economic development and rising incomes levels

Economic development and rising incomes in emerging markets have a direct impact on fertilizer consumption. As economies grow, the standard of living improves, leading to changes in dietary habits and increased consumption of diverse food products. This shift in dietary patterns, such as higher meat consumption, necessitates larger quantities of animal feed, which in turn, drives the demand for fertilizers used in feedstock cultivation. Moreover, rising incomes enable farmers to invest in modern agricultural practices, including the use of fertilizers, to enhance crop yields and improve the quality of their produce. This economic transformation in emerging markets fuels the growth of the global fertilizer market.

##### Government policies and subsidies

Government policies and subsidies significantly influence the fertilizer market. Many countries implement agricultural policies to support and incentivize farmers, thereby boosting agricultural productivity. These policies include subsidies on fertilizers, making

them more affordable and accessible to farmers. Additionally, governments promote the adoption of specific fertilizers to address specific agricultural challenges or environmental concerns. Conversely, changes in government policies, such as the reduction or elimination of fertilizer subsidies, can have adverse effects on the fertilizer market by impacting demand and profitability. The interplay between government regulations and subsidies can shape the usage and production of fertilizers on a regional and global scale.

#### Fertilizer Industry Segmentation:

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

#### Breakup by Product Type:

Chemical Fertilizer  
Biofertilizers

Chemical fertilizer dominates the market

The report has provided a detailed breakup and analysis of the market based on the product type. This includes chemical fertilizer and biofertilizers. According to the report, chemical fertilizer represented the largest segment.

The chemical fertilizer segment is experiencing substantial growth, primarily due to the increasing global population, which has heightened the demand for food, compelling farmers to adopt modern agricultural practices to maximize crop yields. Chemical fertilizers play a pivotal role in enhancing soil fertility and providing essential nutrients to plants, thereby improving agricultural productivity. Additionally, advancements in agricultural technology and precision farming practices have resulted in more efficient utilization of chemical fertilizers. In line with this, environmental concerns have prompted the development of eco-friendly and sustainable chemical fertilizers. Manufacturers are focusing on producing formulations that minimize environmental impact while maintaining agricultural productivity. Moreover, government support through policies and subsidies for the agricultural sector has encouraged the adoption of chemical fertilizers among farmers, boosting market growth. Furthermore, ongoing efforts to address climate change and its impact on crop patterns and soil conditions have stimulated research and innovation in chemical fertilizers, driving the market

towards more climate-resilient solutions.

#### Breakup by Product:

Straight Fertilizers

Nitrogenous Fertilizers

Urea

Calcium Ammonium Nitrate

Ammonium Nitrate

Ammonium Sulfate

Anhydrous Ammonia

Others

Phosphatic Fertilizers

Mono-Ammonium Phosphate (MAP)

Di-Ammonium Phosphate (DAP)

Single Super Phosphate (SSP)

Triple Super Phosphate (TSP)

Others

Potash Fertilizers

Muriate of Potash (MoP)

Sulfate of Potash (SoP)

Secondary Macronutrient Fertilizers

Calcium Fertilizers

Magnesium Fertilizers

Sulfur Fertilizers

Micronutrient Fertilizers

Zinc

Manganese

Copper

Iron

Boron

Molybdenum

Others

Complex Fertilizers

Straight fertilizers hold the largest share in the market

A detailed breakup and analysis of the market based on the product has also been provided in the report. This includes straight fertilizers [nitrogenous fertilizers (urea,

calcium ammonium nitrate, ammonium nitrate, ammonium sulfate, anhydrous ammonia, and others); phosphatic fertilizers (mono-ammonium phosphate (MAP), di-ammonium phosphate (DAP), single super phosphate (SSP), triple super phosphate (TSP), and others); potash fertilizers (muriate of potash (MoP) and sulfate of potash (SoP)); secondary macronutrient fertilizers (calcium fertilizers, magnesium fertilizers, and sulfur fertilizers); and micronutrient fertilizers (zinc, manganese, copper, iron, boron, molybdenum, and others)] and complex fertilizers. According to the report, straight fertilizers represented the largest segment.

The straight fertilizers segment is experiencing notable growth due to the increasing global population and subsequent rise in food demand, which have put immense pressure on the agricultural sector to enhance crop productivity. Straight fertilizers, such as nitrogen-based fertilizers, provide essential nutrients directly to the soil, promoting vigorous plant growth and higher yields. This is further bolstered by the growing adoption of modern agricultural practices, including precision farming, which has driven the demand for straight fertilizers. Furthermore, government initiatives and subsidies aimed at supporting agriculture have bolstered the usage of straight fertilizers among farmers. Additionally, the expansion of agricultural land and the cultivation of high-value cash crops are acting as other growth-inducing factors. Apart from this, advancements in fertilizer production technologies and innovations in product formulations have increased their efficacy and appeal to farmers. In line with this, rising awareness about the role of straight fertilizers in ensuring food security and sustainable agriculture has contributed to their growth.

Breakup by Product Form:

Dry

Liquid

Dry dominates the market

The report has provided a detailed breakup and analysis of the market based on the product form. This includes dry and liquid. According to the report, dry represented the largest segment.

The growth of the dry segment in the fertilizer market can be attributed to the umpteen advantages dry fertilizers offer in terms of storage and transportation efficiency. Their low moisture content reduces the risk of caking and ensures a longer shelf life, making them easier to handle and store for extended periods. Additionally, dry fertilizers are

more cost-effective compared to liquid or organic alternatives, appealing to farmers aiming for higher cost efficiencies in their agricultural practices. Moreover, the increasing adoption of precision agriculture techniques has spurred the demand for dry fertilizers. These techniques require accurate and controlled application of fertilizers, and dry formulations allow for better precision in distribution. Furthermore, the rising popularity of conservation tillage practices, where fertilizers are applied directly to the soil surface, aligns well with the use of dry fertilizers, promoting their growth. Besides this, environmental considerations play a crucial role in driving the demand for dry fertilizers. These formulations often exhibit reduced leaching and volatilization, leading to a lower environmental impact.

#### Breakup by Crop Type:

- Grains and Cereals
- Pulses and Oilseeds
- Fruits and Vegetables
- Flowers and Ornamentals
- Others

Grains and cereals hold the largest share in the market

A detailed breakup and analysis of the market based on the crop type has also been provided in the report. This includes grains and cereals, pulses and oilseeds, fruits and vegetables, flowers and ornamentals, and others. As per the report, grains and cereals represented the largest segment.

The grains and cereals segment are experiencing significant growth, driven by the ever-increasing global population that have fueled the demand for staple food crops like grains and cereals. Furthermore, changing dietary patterns and preferences, especially in emerging markets, are propelling the consumption of grains and cereals. Moreover, advancements in agricultural technology have significantly enhanced productivity in the grains and cereals sector. Precision farming techniques, genetically modified crops, and improved irrigation methods all contribute to increased yields and better overall output. In line with this, growing awareness of the nutritional benefits of grains and cereals has led to increased consumption. These crops are often rich in essential nutrients and play a vital role in combating malnutrition and promoting a healthy diet. Additionally, government policies and subsidies that support farmers in the production of grains and cereals have bolstered the industry's growth.

## 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

Asia Pacific exhibits a clear dominance, accounting for the largest 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); Europe (Germany, France, the United Kingdom, Italy, Spain, Russia, and others); Asia Pacific (China, Japan, India, South Korea, Australia, Indonesia, and others); Latin America (Brazil, Mexico, and others); and the Middle East and Africa. According to the report, Asia Pacific accounted for the largest market share.

Asia Pacific dominates the global fertilizer market due to the region's vast and diverse agricultural landscape, coupled with a large population. Additionally, the presence of major agricultural economies, such as China and India, plays a pivotal role in fueling

fertilizer consumption. Moreover, favorable government policies and initiatives and the adoption of advanced agricultural technologies and practices, including precision farming and the use of innovative fertilizers, contributes to enhanced productivity in the region. Furthermore, Asia Pacific's position as a major fertilizer manufacturer and exporter strengthens its dominance in the global market. The region's competitive advantage in production capabilities and cost efficiency allows it to cater to both domestic and international demand, bolstering its market share. In line with this, the region's increasing awareness of sustainable agriculture and environmental concerns has led to the development and adoption of eco-friendly fertilizers, further propelling its leadership in the global fertilizer market.

#### Competitive Landscape:

The competitive landscape of the global fertilizer market is characterized by intense rivalry and a diverse array of players vying for market share. As one of the most crucial industries in agriculture, numerous companies, both large conglomerates and specialized firms, participate in this highly dynamic sector. These players compete based on factors such as product range, quality, pricing strategies, distribution networks, and innovative solutions. Market leaders focus on establishing themselves as thought leaders and experts in the domain of market research and consulting services to differentiate themselves from competitors.

Moreover, companies constantly strive to enhance their product offerings to cater to the evolving needs of farmers and agricultural stakeholders. They also invest significantly in research and development to introduce sustainable and eco-friendly fertilizers, aligning with the growing environmental concerns. As the global population continues to grow, and food security becomes a critical challenge, the competition within the fertilizer market is expected to intensify, compelling companies to innovate, collaborate, and adapt swiftly to maintain a competitive edge in this ever-evolving industry.

The report has provided a comprehensive analysis of the competitive landscape in the market. Detailed profiles of all major companies have also been provided. Some of the key players in the market include:

CF Industries

Haifa Group

Indian Farmers Fertiliser Co-operative Limited (IFFCO)

Israel Chemicals Ltd. (ICL)

Nutrien Limited

Sociedad Química y Minera (SQM)



The Mosaic Company  
Uralkali  
Yara International

#### Recent Developments:

In September 2021, Yara acquired Finish Colan as a strategic move to expand its organic fertilizer business, thereby illustrating the company's dedication to strengthening its presence in the organic fertilizer industry.

In May 2023, Bunge Limited and Nutrien Ag Solutions announced a strategic alliance and commercial agreement to support US farmers in the implementation of sustainable farming practices to help increase the development of lower carbon products.

In August 2023, SimpliiGood teamed up with Haifa Group to optimize the Israeli food tech innovator's spirulina supply chain.

#### Key Questions Answered in This Report

1. What was the size of the global fertilizer market in 2023?
2. What is the expected growth rate of the global fertilizer market during 2024-2032?
3. What are the key factors driving the global fertilizer market?
4. What has been the impact of COVID-19 on the global fertilizer market?
5. What is the breakup of the global fertilizer market based on the product type?
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7. What is the breakup of the global fertilizer market based on the product form?
8. What is the breakup of the global fertilizer market based on the crop type?
9. What are the key regions in the global fertilizer market?
10. Who are the key players/companies in the global fertilizer market?

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