

Sulfur Fertilizers Market Report by Type (Sulphate Fertilizers, Elemental Sulfur Fertilizers, Liquid Sulfur Fertilizers, and Others), Cultivation Type (Conventional Agriculture, Controlled Environment Agriculture), Crop Type (Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, and Others), Form (Dry, Liquid), Mode of Application (Soil, Foliar, Fertigation), and Region 2024-2032

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Abstracts

The global sulfur fertilizers market size reached US\$ 5.7 Billion in 2023. Looking forward, IMARC Group expects the market to reach US\$ 7.5 Billion by 2032, exhibiting a growth rate (CAGR) of 3% during 2024-2032. The sulfur fertilizers market is primarily propelled by the launch of favorable initiatives by government bodies to minimize sulfur emissions, owing to their negative impact on the environment, along with the introduction of elemental sulfur enriched NPK fertilizers.

Global Sulfur Fertilizers Market Analysis:

Major Market Drivers: The rising demand for effective soil supplements, including sulfur fertilizers, is primarily bolstering the global market. Additionally, the growing awareness among consumers towards soil deterioration caused by limited arable land and conventional agriculture practices is also positively influencing the sulfur fertilizers market outlook.

Key Market Trends: The elevating trend of using organic food production and sustainable farming practices is driving the global market. Besides this, the

inflating usage of low-impact and natural product variants is also fueling the sulfur fertilizers market demand. Moreover, extensive applications of these fertilizers in modern farming practices to enhance crop quality are further augmenting the market across the globe.

Competitive Landscape: Some of the leading players in the global sulfur fertilizers market include Achema, Coromandel International Limited (Murugappa Group), ICL Group Ltd., K+S AG, Koch Industries Inc., Kugler Company, Mitsui & Co. Ltd., Nutrien Ltd., Royal Dutch Shell plc, Sulfur Mills Limited, The Mosaic Company, and Yara International ASA, among many others.

Challenges and Opportunities: One of the primary challenges in the sulfur fertilizers market is the emerging trend towards organic farming that generally relies on sustainable methods of soil management. Apart from this, the rising consumer concerns about the elevating air pollution levels are also hindering the sulfur fertilizers market share. However, the introduction of slow-release sulfur fertilizers is expected to stimulate the market growth over the forecasted period.

Global Sulfur Fertilizers Market Trends:

Strategic Partnerships and Collaborations

Key players across numerous countries are entering into agreements to enhance the efficiency of sulfur fertilizers and expand their product portfolio. This, in turn, is stimulating the market growth. For example, in March 2020, the Mosaic Company announced an agreement with the Financial Technology Research Centre (FTRC) at the University of Adelaide in Australia to emphasize on enhancing the efficiency of fertilizers. Similarly, in February 2020, ICL stated the acquisition of Growers Holdings Inc. (US), an innovator in data-driven farming, that offers diversified information on on-field applications and fertilization.

Regulations by Government Bodies

The regulatory bodies across the countries are focusing on offering more efficient nutrient use and minimizing environmental impact, thereby catalyzing the sulfur fertilizers market. For instance, various sulfur fertilizers have been included in the Fertilizer Control Order (FCO). Moreover, their sulfur content is a part of the fertilizer

specifications. Government bodies are further implementing stringent regulations to make it mandatory to declare the sulfur content in the product on the bag. In line with this, they are also providing tax benefits and fiscal benefits to encourage the farmers to use sulfur fertilizers. For example, the government in India increased the subsidy on sulfur fertilizer to Rs 3.56 per kg. It kept the support unchanged for other non-urea nutrients to promote the balanced use of farm supplements. To meet the increasing food demand that requires enhanced agricultural productivity, regulatory authorities are launching favorable policies to promote the usage of effective soil supplements, such as sulfur fertilizers. For example, policies, including Pradhan Mantri Kisan Samman Nidhi (PM-KISAN) in India, are helping in elevating the agricultural industry across the country. The payments of Rs.2000 are made to the families of farmers nationwide every four months as part of the Scheme, which, in turn, offers annual income support of Rs. 6000 to help them concentrate more on farming, thereby propelling the sulfur fertilizers market revenue.

Increasing Applications of Novel Sulfur Fertilizers

The introduction of elemental sulfur fertilizers that are gaining extensive applications in end-use industries, including petroleum refining, rubber manufacturing firms, agrochemicals, etc., is bolstering the sulfur fertilizers market value. For instance, in June 2021, Northern Nutrients, a Canadian company, announced the development of a new sulfur production plant by utilizing Royal Dutch Shell's Thiogro technology, which converts micronized elemental sulfur into urea granules. Furthermore, Nutrien introduced Smart Nutrition MAP+MST fertilizer, which usually combines micronized sulfur with phosphates, and offers plants a consistent supply of nutrients all season long. These innovations will continue to drive the sulfur fertilizers market over the forecasted period.

Sulfur Fertilizers Industry 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, cultivation type, crop type, form, and mode of application.

Breakup by Type:

Sulphate Fertilizers

Elemental Sulfur Fertilizers

Liquid Sulfur Fertilizers

Others

The report has provided a detailed breakup and analysis of the market based on the type. This includes sulphate fertilizers, elemental sulfur fertilizers, liquid sulfur fertilizers, and others.

Sulfate fertilizers, including potassium sulfate, ammonium sulfate (AS), magnesium sulfate, etc., usually contain sulfur in the commonly available sulfate form. Elemental sulfur fertilizers are natural minerals that require to be oxidized by soil bacteria to the sulfate form before plants can utilize them. Besides this, liquid sulfur fertilizers offer a quick source of sulfur to plants, especially during periods of high sulfur demand. As such, they are gaining extensive traction, as they aid in promoting healthy plant growth and improving crop yield.

Breakup by Cultivation Type:

Conventional Agriculture

Controlled Environment Agriculture

The report has provided a detailed breakup and analysis of the market based on the cultivation type. This includes conventional agriculture and controlled environment agriculture.

Controlled environment agriculture (CEA) generally utilizes advanced science to cultivate crops in a controlled setting. Moreover, greenhouses and other enclosed and temperature-controlled spaces are adopted for the cultivation process, where the roots of the plants receive a steady supply of fertilizer, water, and sunlight. The controlled environment agriculture technique is environmentally safe and yields high-value crops at optimum productivity. Apart from this, sulfur fertilizers that assist crops in holding onto moisture are especially useful in conservation-intensive agriculture, as they minimize water needs.

Breakup by Crop Type:

Cereals and Grains

Oilseeds and Pulses

Fruits and Vegetables

Others

The report has provided a detailed breakup and analysis of the market based on the crop type. This includes cereals and grains, oilseeds and pulses, fruits and vegetables, and others.

For individuals in underdeveloped nations, pulses and oilseeds are staple crops farmed in semi-arid tropical climates. As crops in these regions have a sulfur deficiency, there is an inflating requirement for plant nutrients, such as sulfur fertilizers, to grow oilseeds. Moreover, these fertilizers are extensively used across the globe to produce more yield and effective fruits and vegetables on the available arable land.

Breakup by Form:

Dry

Liquid

The report has provided a detailed breakup and analysis of the market based on the form. This includes dry and liquid.

The growing consumer awareness towards liquid sulfur fertilizers, as they are quickly absorbed by plants and simple to use, is primarily driving the market growth. For example, in 2021, Yara International ASA developed a product variant, known as the YaraVita Optimum, which is a liquid sulfur fertilizer. It was specifically formulated to enhance crop quality and yield. Similarly, in 2020, Nutrien Ltd. introduced eNpower, which is a liquid sulfur fertilizer. However, based on the form, dry sulfur fertilizers are gaining extensive traction among farmers, owing to their ease of handling and cost-effectiveness.

Breakup by Mode of Application:

Soil

Foliar

Fertigation

The report has provided a detailed breakup and analysis of the market based on the mode of application. This includes soil, foliar, and fertigation.

Incorporating sulfur into the soil helps in improving its availability to plants over time. Besides this, foliar applications involve spraying a dilute solution of sulfur fertilizer directly onto the leaves of plants. On the other hand, fertigation can be particularly beneficial in areas where sulfur deficiencies are common.

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 leads the market, accounting for the largest sulfur fertilizers market share.

The market research 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.

Sulfur is produced in all world regions, but half of all production takes place in North

America and the Middle East. Moreover, around 36 million tons of sulfur are traded annually, accounting for 53% of total sulfur production. The Middle East accounts for over 40% of exports. Favorable programs by government bodies in North America supporting environmentally friendly farming methods are propelling the demand for sulfur fertilizers. Furthermore, the widespread use of sustainable agriculture techniques, especially in countries, including India and China, is augmenting the adoption of sulfur fertilizers.

Leading Key Players in the Sulfur Fertilizers Industry:

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

Achema

Coromandel International Limited (Murugappa Group)

ICL Group Ltd.

K+S AG

Koch Industries Inc.

Kugler Company

Mitsui & Co. Ltd.

Nutrien Ltd.

Royal Dutch Shell plc

Sulfur Mills Limited

The Mosaic Company

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.)

Global Sulfur Fertilizers Market News:

February 2024: The Union Cabinet, chaired by Prime Minister Narendra Modi, accepted the proposal of the Department of Fertilizer to set nutrient-based subsidy (NBS) rates for the 2024-25 kharif sowing season.

January 2024: The Ministry of Chemicals and Fertilizers issued a notification to the managing directors and chief managing directors of all fertilizer manufacturing companies. The directive followed the approval of the Cabinet Committee on Economic Affairs (CCEA) for the launch of sulfur-coated urea under the brand name 'Urea Gold.'

Key Questions Answered in This Report

How has the global sulfur fertilizers market performed so far and how will it perform in the coming years?

What has been the impact of COVID-19 on the global sulfur fertilizers market?

What are the key regional markets?

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

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

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

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

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

What are the various stages in the value chain of the industry?

What are the key driving factors and challenges in the industry?

What is the structure of the global sulfur fertilizers market and who are the key players?

What is the degree of competition in the industry?

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