

# Anti-Caking Agent for Fertilizer Global Market Insights 2025, Analysis and Forecast to 2030, by Manufacturers, Regions, Technology, Application, Product Type

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## Abstracts

### Anti-Caking Agent for Fertilizer Market Summary

The global Anti-Caking Agent for Fertilizer market represents a critical sub-sector within the broader agricultural chemicals industry, providing essential additives that preserve fertilizer quality during production, storage, and transportation. Anti-caking agents prevent the agglomeration of fertilizer granules by reducing moisture absorption and minimizing surface adhesion. These additives are indispensable for ensuring consistent nutrient release, optimizing handling efficiency, and maintaining the commercial value of fertilizers in diverse climatic and logistical environments. By 2025, the market size is estimated in the range of USD 0.8–1.6 billion, underscoring its strategic importance to the fertilizer value chain. Looking ahead to 2030, the market is projected to grow at a compound annual growth rate (CAGR) of 3.4%–6.4%, supported by rising global fertilizer consumption, increasingly sophisticated agricultural practices, and the demand for higher-value fertilizer formulations tailored to intensive crop production systems.

### Application Analysis and Market Segmentation

#### CAN/AN Fertilizers

Calcium Ammonium Nitrate (CAN) and Ammonium Nitrate (AN) fertilizers represent significant application segments for anti-caking agents due to their hygroscopic properties. Anti-caking additives are critical for ensuring long-term stability in storage

and transit. This segment is expected to expand at a CAGR of 3.5%–6.0%, benefiting from steady demand in European and Asian agricultural markets, where CAN/AN products are widely utilized in intensive grain and vegetable cultivation.

### DAP Fertilizers

Di-Ammonium Phosphate (DAP) remains one of the most widely traded and applied phosphate fertilizers. The addition of anti-caking agents enhances its usability in bulk handling systems, particularly in hot and humid regions. The DAP-related anti-caking market is forecast to grow at a CAGR of 3.8%–6.2%, supported by sustained demand from South Asia, Africa, and Latin America, where phosphorus application is critical to soil fertility improvement.

### NPK Fertilizers

Complex NPK fertilizers, combining nitrogen, phosphorus, and potassium, represent a rapidly expanding segment. Anti-caking additives help ensure physical stability of these multi-nutrient formulations, which are particularly prone to agglomeration. With growing global demand for balanced nutrient blends, this segment is projected to grow at a CAGR of 4.0%–6.4%, fueled by precision agriculture practices and adoption in regions where farmers seek to maximize yields per hectare.

### Urea

Urea is the world's most widely consumed nitrogen fertilizer, but its high hygroscopicity makes it especially susceptible to caking under humid conditions. Anti-caking agents play a central role in maintaining urea quality throughout global trade and distribution chains. This segment is projected to see growth of 3.5%–6.0% annually, underpinned by rising consumption in Asia-Pacific and Africa.

### Other Fertilizers

Additional applications in specialty fertilizers, micronutrient-enriched formulations, and slow-release fertilizers contribute to steady demand. Growth rates are estimated at 3.0%–5.0%, depending on adoption of specialized crop nutrition solutions.

## Type Analysis

### Oil-Based Anti-Caking Additives

Oil-based formulations remain widely used due to their effectiveness in forming protective coatings that prevent moisture absorption and granule adhesion. This type is expected to maintain steady growth of 3.2%–5.5%, particularly in bulk fertilizer applications where robust physical protection is required.

### Water-Based Anti-Caking Additives

Water-based solutions are increasingly gaining traction due to their lower environmental footprint, ease of application, and compatibility with advanced coating technologies. This segment is expected to record higher growth rates of 4.0%–6.4%, reflecting the broader shift toward sustainable additives in agricultural inputs.

## Regional Market Distribution and Geographic Trends

The Asia-Pacific region represents the largest and fastest-growing market, with expected growth rates of 4.0%–6.5% annually. China and India are leading consumers, reflecting their large-scale fertilizer production and consumption, as well as strong policy support for agricultural productivity. Southeast Asian markets also contribute significantly, given the region's reliance on fertilizer-intensive crops such as rice, palm oil, and sugarcane.

Europe shows steady demand, with growth of 3.0%–5.0%, particularly in CAN and AN fertilizers where anti-caking agents are essential. Regulatory emphasis on fertilizer quality and safety drives continued adoption. Eastern European countries, with expanding agricultural output, further support regional demand.

North America demonstrates moderate growth at 2.8%–4.5%, led by the United States, where large-scale mechanized farming requires stable fertilizer products suitable for precision application. Demand is concentrated in NPK and urea fertilizers used in corn, soybeans, and wheat cultivation.

Latin America is emerging as a growth market, with demand increasing at 3.5%–6.0%

annually. Brazil, in particular, is a leading consumer due to its reliance on imported fertilizers and the growing adoption of NPK formulations in soybean, sugarcane, and maize cultivation.

Middle East and Africa display significant long-term potential, with growth rates of 4.0%–6.2%, supported by efforts to enhance agricultural productivity and food security. Countries such as Morocco and South Africa are key fertilizer consumers, while Sub-Saharan Africa is increasingly adopting fertilizers to boost crop yields.

### Key Market Players and Competitive Landscape

**Arkema** – A global specialty chemicals producer, Arkema provides a diversified range of additives including anti-caking agents tailored for fertilizer stability. Its broad geographic footprint enables strong customer engagement across major agricultural markets.

**Imerys** – A leading industrial minerals company, Imerys supplies mineral-based anti-caking agents that improve the handling properties of bulk fertilizers. Its portfolio emphasizes performance consistency and adaptability to diverse fertilizer formulations.

**Kao Corporation** – With expertise in surfactants and chemical additives, Kao contributes advanced anti-caking solutions, leveraging its R&D strengths in specialty chemicals and sustainable formulations.

**ORLEN Group** – A Central European energy and chemical company, ORLEN integrates anti-caking agent production within its broader fertilizer operations, ensuring supply security and synergy with large-scale fertilizer customers.

**Holland Novochem BV and Instral BV** – These European players focus on tailored additive solutions for fertilizer producers, offering technical expertise and strong customer collaboration within the region.

**Anhui Furuixue Chemical and Technology Co. Ltd.** – Based in China, the company has an annual production capacity of 50,000 tons, serving domestic and international markets with a focus on high-quality anti-caking agents for various fertilizer types.

**Hubei Forbon Technology Co. Ltd.** – A major Chinese supplier with current

capacity of 57,500 tons and an additional 15,000 tons under construction, expected to reach 72,500 tons by 2026. The company is expanding aggressively to meet growing domestic and international demand.

Suzhou Fengbei Biotech Co. Ltd. – Specializes in customized anti-caking solutions, with strengths in innovation and serving niche fertilizer formulations, reflecting China's diversified chemical manufacturing base.

## Porter's Five Forces Analysis

### Supplier Power: Moderate to High

The market depends on specialized chemical formulations and raw materials, giving suppliers significant influence, particularly those with proprietary technologies and large-scale production capacity.

### Buyer Power: Moderate

Fertilizer producers represent concentrated demand, but technical requirements for consistent performance limit switching options. Buyers leverage volume but depend on long-term supplier reliability.

### Threat of New Entrants: Low

High technical barriers, capital-intensive production, and the need for regulatory compliance create significant entry challenges. Established customer relationships further insulate incumbents.

### Threat of Substitutes: Low to Moderate

While mechanical solutions (such as controlled storage environments) can reduce caking, chemical anti-caking agents remain the most efficient and cost-effective solution, limiting substitution potential.

## Competitive Rivalry: Moderate to High

Competition is intense among established global players and rapidly expanding Chinese producers. Differentiation is achieved through product quality, sustainability, and customer technical support.

## Market Opportunities and Challenges

### Opportunities

Rising fertilizer consumption, particularly in Asia-Pacific and Africa, underpins demand for anti-caking agents.

Technological advances in coating and additive formulations create potential for higher-performance, environmentally friendly solutions.

Precision agriculture and complex fertilizers drive demand for tailored anti-caking agents.

Growing global food security concerns support structural demand growth for fertilizers and related additives.

### Challenges

Raw material cost volatility may impact production economics.

Stringent environmental regulations on chemical additives could pressure manufacturers to innovate greener alternatives.

Seasonal fluctuations in fertilizer demand create supply chain management challenges.

Intense competition from both multinational corporations and expanding regional producers may lead to margin pressure.

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