Middle East & Africa Fertilizers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030

Market Report | 2024-02-17 | 90 pages | Mordor Intelligence

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Report description:

The Middle East & Africa Fertilizers Market size is estimated at USD 51.76 billion in 2024, and is expected to reach USD 78.30 billion by 2030, growing at a CAGR of 7.14% during the forecast period (2024-2030).

Key Highlights
-Fastest growing segment by Product - Iron : The alkaline soils with high pH and degrading health and quality of soils are making them deficient in Iron thus increasing the demand for high-yield crop production.
-Largest Segment by Crop Type - Field Crops : Cultivation of field crops accounts for more than 90% of the total agricultural land in the region and accounts for highest consumption of 87.2% of the total CRF fertilizes.
-Fastest growing by Speciality Type - Water Soluble : With the adoption of Water-soluble fertilizers, a fertilizer efficiency of 80.0-90.0% can be achieved. This method significantly reduces time, labor, and energy consumption.
-Largest segment by Country - South Africa : South Africa has large agricultural area in the region, it acccounts for about 35% of the total crop area in the region and has some of the largest fertilizer production units.

MEA Fertilizers Market Trends

Field Crops is the largest segment by Crop Type.

- The overall fertilizer market is estimated to register a CAGR of 5.1% during the forecast period. Agriculture is by far the single most important economic activity in Africa. It provides employment for about two-thirds of the continent's working population, and

for each country, it contributes an average of 30-60% of gross domestic product and 30.0% of the value of exports.
- Africa is regarded as a key center of agricultural production because of the availability of arable land. Also, only 6.0% of Africa's cultivated land is irrigated, and average fertilizer consumption in Sub-Saharan Africa is estimated at 17.0 kg of nutrients per hectare of cropland in 2018 compared with a world average fertilizer consumption of 135.0 kg/ha.
- Wheat and barley are the major staple crops grown in the Middle East region. In addition, significant quantities of rice, maize, lentils, chickpeas, vegetables, and fruits are produced throughout the region, mainly in Egypt and Saudi Arabia. A number of vegetables, including tomatoes, onions, cabbages, peppers, okra, eggplants, and cucumbers, are raised in Africa. Tomatoes and onions, the most common vegetables, grow in large quantities along the coast of North Africa. The principal beverage crops of Africa are tea, coffee, cocoa, and grapes.

- The agriculture sector is key for economic and social development, but the sector's potential has not received enough attention from policymakers and stakeholders in the Middle East and North Africa (MENA) region. Despite its small contribution to GDP, agriculture is strategic for sustainable development in the MENA countries, which is anticipated to boost the fertilizers market in the region during the forecast period.

South Africa is the largest segment by Country.

- The fertilizers market in the region is estimated to register a CAGR of 5.1% during the forecast period.
- Africa has the highest population with the largest arable land. For instance, the Sub-Saharan African region has 13% of the world's population and approximately 20% of the global agricultural land. However, the region is facing severe food insecurity, which is primarily attributed to inadequate food production.
- The lack of access to mechanization in farming and the limited use of fertilizers due to less farmer buying power are driving the demand for alternative cost-effective fertilizers, such as conventional fertilizers, in the region.
- In 2018, the total consumption of fertilizers in regions such as Ghana, Kenya, and Mali was reported at 310,866 metric ton, 545,675 metric ton, and 816,375 metric ton, respectively, while the imports were recorded at 315,157 metric ton, 626,418 metric ton, and 705,746 metric ton, respectively. Hence, the increased consumption of fertilizers is anticipated to drive the segment's growth.

- In the Middle Eastern region, the climatic conditions are unfavorable for farming activities. The region is mostly dependent on imports to meet its domestic consumption requirements. Hence, the adoption of fertilizers is comparatively higher to meet the rising domestic and international demand.

- Although fertilizers can sustainably increase yields with significant economic benefits to farmers, the availability of raw materials and favorable environmental conditions are limiting their usage across various countries. These fertilizers are not widely accessible and cannot be adopted by smallholder farmers in the African region, thereby limiting the market's growth.

MEA Fertilizers Industry Overview

The Middle East & Africa Fertilizers Market is fragmented, with the top five companies occupying 16.57%. The major players in this market are Foskor, Golden Fertilizer Company Limited, ICL GROUP LTD, K+S AKTIENGESELLSCHAFT and Yara International ASA, (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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