

North America Fertilizers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2016 - 2030

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Report description:

The North America Fertilizers Market size is estimated at USD 61.08 billion in 2024, and is expected to reach USD 81.87 billion by 2030, growing at a CAGR of 5% during the forecast period (2024-2030).

Key Highlights

- Largest segment by Product - Urea : Urea has a high nitrogen content of 46%. It is easy to manufacture, transport, and store. It is also easily convertible into ammonium ion, which is a plant-usable form.
- Largest Segment by Crop Type - Field Crops : The domination of field crops in North America's fertilizer market is mainly due to its large cultivation area. Field crops account for more than 95% of the total crop area.
- Fastest growing by Speciality Type - SRF : The SRF are safe to the soil and environment as they precisely release the nutrients in to the soil throughout the cropping season and thus reduce the leaching of nutrients.
- Largest segment by Country - United States : The United States accounts for about 69% of North America's total agricultural crop area. The country is also one of the major producers of fertilizers in the region.

North America Fertilizer Market Trends

Field Crops is the largest segment by Crop Type.

- In North America, field crops dominate fertilizer consumption in terms of value and volume. In this region, field crop cultivation accounts for more than 95.0% of total agricultural land. The United States occupies about 69.0% of the total available arable land

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in the North American region. In this, 84.0 % of the land is used for the cultivation of field crops.

- Turfs and Ornamentals crops occupied the second largest position in terms of total cultivation area, followed by the field crops in the North American region. The use of specialty fertilizers such as water-soluble, slow, and controlled-release fertilizers is more compared to field and Horticultural crops.
- Horticultural crops account for just 4.7% of the total agricultural land. The horticultural crops accounted for about 4.3% of the total fertilizer market value in 2021. In this, conventional fertilizers account for about 54.0%, and specialty fertilizers account for about 46.0% of the total market value in the same year.
- The decrease in fertilizer volume between 2018-2019 is due to severe floods that affected the agricultural land, and the United States department of agriculture stated that they were not able to utilize more than 19.4 million acres of cropland in 2019.
- There is a significant increase in the value of fertilizers between 2020-2021. This is because the global supply chain has been disrupted due to the global pandemic, and there is a severe shortage of containers. The shipping cost increased by almost 4 times compared to pre-pandemic prices, which was reflected in the fertilizer prices.
- Therefore North America, being a dominant field of crop production, the companies have better scope to penetrate the specialty and other efficient fertilizers segment.

United States is the largest segment by Country.

- In North America, the United States and Canada constitute more than 90.0% of the fertilizers market value and volume. Even though North America has phosphate and potash resources, the region is a net importer of more than half nitrogenous and over 85.0% potash from international sources.
- The United States and Canada are the largest producers of fertilizers in the region, with 69.0% and 18.5% of the total crop acreage of North America. Additional scientific and technical advancements in fertilizers in recent years helped farmers maximize fertilizer benefits.
- The United States is the largest market in the region, accounting for about 82.1% of the total fertilizers market value in 2021, as it occupies about 73.6% of total agricultural land in North America.
- Canada is the second-largest fertilizer market in North America, accounting for about 11.7% of the total fertilizer market in 2021.
- Generally, in North America, agriculture has been mechanized with the latest technology, particularly in the United States and Canada. These technological improvements demand more efficient and sustainable fertilizers in the region.
- The supply chain disruptions in 2019-2020 declined the fertilizer value and volume in the region. However, between 2020 and 2021, the demand recovery for fertilizers and increased input costs resulted in a spike in the fertilizer value.
- In the North American region, the United States and Canada are the biggest and most advanced economies. Most of the multinational companies are situated in the region, giving an advantage to growers and farmers in terms of fertilizer product availability.

North America Fertilizer Industry Overview

The North America Fertilizers Market is fairly consolidated, with the top five companies occupying 86.75%. The major players in this market are CF Industries Holdings, Inc., Nutrien Ltd., The Mosaic Co., Wilbur-Ellis Company LLC and Yara International ASA (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format

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