

Primary Nutrient Fertilizers Market Assessment, By Nutrient Type [Nitrogen, Phosphorus, Potassium], By Form [Solid, Liquid], By Crop Type [Cereals and Grains, Fruits and Vegetables, Oilseeds and Pulses, Others], By Application [Foliar, Fertigation, Others], By Region, Opportunities and Forecast, 2017-2031F

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Report description:

Global primary nutrient fertilizers market is projected to witness a CAGR of 7.20% during the forecast period 2024-2031, growing from USD 2.93 billion in 2023 to USD 5.10 billion in 2031. The market is highly significant toward achieving the ever-increasing demand for food globally. Nitrogen, phosphorus, and potassium (N-P-K) based fertilizers help boost soil health and increase crop production and crop yield. With the expansion of the global population, there is an incessant demand for food, and therefore farmers and agribusinesses are turning to the use of these fertilizers to enhance productivity, given the scarce arable lands available.

The market has a great advantage because of the constant ongoing developments, including improved nutrient use and reduced environmental pollution with the help of slow-release and controlled-release fertilizers. Sustainable farming practices and healthy soils are gaining momentum as farmers attempt to increase yield without compromising environmental stewardship.

In addition, companies are developing innovative machines for fertilizer application, boosting the demand for fertilizers in the market. For instance, in February 2024, the Brazilian multinational Grupo Jacto, which focuses on agricultural machinery, solutions, and services, introduced the Uniport 2024 NPK self-propelled fertilizer machine. The machine is remarkable for its design, characterized by an engine placed in front, a spacious operating area, and a tank of 8000 grams capacity. It is further equipped with a number of onboard technologies oriented towards environmental protection.

Nonetheless, there are issues, such as the volatility of the prices of raw materials and pollution due to excessive usage of fertilizers, which need to be addressed. The market has been changing with an increasing emphasis on cost-effectiveness, environmental sustainability, and customized offerings for different crops and regions. In general, the global primary nutrient fertilizers market is anticipated to grow owing to the increasing need for agriculture for the production of crops and eco-friendly

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farming methods.

Advancements in Fertilizer Technology to Catalyze Market Expansion

Improvements in fertilizer technologies are changing the scope of agriculture by enhancing medieval efficiency with methods currently practiced in a much more sustainable and precise way. With controlled-release and slow-release fertilizers, the nutrients are supplied synchronously with the rate of their uptake by plants to minimize the runoffs. Fertilizers in the form of nanoparticles, known as nano-fertilizers, boost the effectiveness of fertilization, increasing the range of its usage and lowering the chances of polluting the environment. Moreover, innovations in the form of fertilizer additives add to the advancements in the industry. For instance, in March 2023, Phospholutions Inc. launched its latest phosphate fertilizer technology, RhizoSorb, to assist in crop production in the United States. The patented fertilizer ingredient, RhizoSorb, works in a unique way to boost the effectiveness of phosphorus fertilizers. It is a fusion of activated metal oxides fixed directly into fertilizer granules during manufacturing. Furthermore, in most irrigation systems, water-soluble fertilizers are common, making sure that precision application is used in high-valued crops and high yields. Moreover, there is a rise in the production of biostimulants and biofertilizers that are obtained from natural sources to improve soil quality and minimize the use of chemicals. These innovations help farmers to increase the level of their production in a responsible manner in order to sustain the growing demand for food worldwide.

Sustainable Farming Practices to Influence Market Growth

The goal of sustainable agriculture is to grow food that does not harm the environment, supports biodiversity, and does not consume the resources of the earth more than it can replenish for future generations. In this context, organic farming is an essential aspect as it refrains from the use of artificial chemicals and pesticides, relying instead on natural fertilizers, compost, and crop rotation to maintain soil quality while preventing erosion of the soil. Governments worldwide are promoting the concept of organic farming to align with global sustainability goals. In fact, according to a USDA study released in November 2023, in 2021, the total area of land in the United States that is certified organic reached 4.89 million acres. Over the last two decades, a higher amount of government spending has been approved for the USDA initiatives that enhance organic research. The mandatory spending cap for the Organic Agriculture Research and Extension Initiative has undergone enormous changes, from USD 3 million in the year 2002 to USD 50 million for the year 2023.

Other sustainable practices include the diversification of crops and the application of integrated pest management (IPM) techniques to minimize chemical usage and enhance the biological equilibrium. The incorporation of these methods leads to increased farm output and improved climate change resilience while striving to achieve high yields without compromising on environmental protection and soil health for the future.

Nitrogen-based Fertilizers Hold a Significant Market Share

The global fertilizers market is dominated by nitrogen-based fertilizers, which are important for increasing crop yield. The development of a plant cannot take place if nitrogen is absent since this is an important component for photosynthesis and protein synthesis, which are essential for the growth and translocation of nutrients in the plant. Most farmers use nitrogen fertilizers because of the nutrient's quick effect on crop growth, especially for cereals and grains with high demand.

The ever-increasing need for nitrogen fertilizers is further driven by the global concern for food supply as they allow farmers to fully utilize the minimal cultivable land. However, the environmental issues associated with nitrogen leaching and emissions are leading to the emergence of controlled-release and precision application technologies that help to enhance productivity while ensuring the principles of sustainability are respected. For instance, in September 2024, Malaysia-based National Farmers' Association (NAFAS) introduced its latest nitrogen-based controlled-release liquid fertilizer, Peladang 25, created to guarantee that its nitrogen content is released gradually, giving plants consistent and efficient nutrition throughout their growth stages. The fertilizer is suitable for crops such as oil palm, Napier grass, rice, and pineapple and is compatible with herbicides and fungicides.

North America to Dominate the Market Growth

North America is positioned at the forefront of the primary nutrient fertilizers market owing to the high level of development in agriculture and the wide use of sophisticated techniques for farming. This is mainly driven by large-scale agriculture practiced in the region that uses substantial fertilizers to improve crop production, especially in key crops such as corn, wheat, and soybeans. Advanced fertilizer technologies such as controlled released fertilizers and precision agriculture have been adopted in North America to maximize farm inputs and protect the environment from pollution associated with fertilizer use. Strengthening its position in the region, in June 2023, Everris International B.V. launched a new line of advanced foliar and fertigation products

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under the brand name Nova in North America. The objective is to provide high-quality water-soluble N-P-Ks and micronutrients to the crops. The range includes Nova FINISH, Nova PULSE, Nova ELEVATE, and Nova FLOW. These products primarily aim to bring the crop nutrients more efficiently to the intended site of action and are designed to achieve maximum solubility and good compatibility with most herbicides and crop protectants.

By encouraging the use of fertilizers and advances in sustainable agriculture practices, governmental backing and conducive agricultural policies come into play. Nevertheless, as awareness of environmental consequences rises, the North American market is progressively making a turn to organic fertilizers aiming at sustainability and environmental conservation without compromising agricultural efficiency.

Future Market Scenario (2024 – 2031F)

□□As the world's population continues to rise, so will the demand for more efficient fertilizers to enhance agricultural production.

□□A better understanding of the quality of soil will enhance the demand for balanced soil nutrient applications as well as soil-friendly fertilizers.

□□It is anticipated that there will be a market for agrochemicals aimed at increasing the resilience of crops to extreme weather conditions.

Key Players Landscape and Outlook

The global primary nutrient fertilizers market is quite competitive due to the key players pursuing innovation, sustainability, and efficiency in order to remain leaders in the market. Furthermore, the leading producers are more focused on advanced fertilizers such as controlled-release fertilizers and nano fertilizers that enhance nutrient use efficiency. Moreover, the firms are diversifying their offerings with biological and organic fertilizers to meet the needs of the sustainable agriculture sector.

Another aspect influencing the landscape is the growing acceptance of internet-enabled fertilizer recommendation systems. They process information on the crops, soils, and the environment in which the crops grow and offer specific amounts and types of fertilizers to farmers to cut down on the wastage of these inputs and increase yield. In fact, in April 2024, more than 100 soil science and agronomic professionals collaborated to release an internet-based Fertilizer Recommendation Support Tool (FRST) that has the potential to save farmers millions of dollars a year while lowering excess nutrient losses to the environment. The tool assists farmers in making decisions about the application of phosphorus and potassium fertilizers using data from across the United States.

In general, the market outlook is positive as the growth is expected to be fueled by technological advancement, the inclination towards green practices, and the worldwide demand for effective nutrient management systems in farming activities.

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*Companies mentioned above DO NOT hold any order as per market share and can be changed as per information available during research work.

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