

Nitrogenous Fertilizers Market Assessment, By Product Type [Ammonium Nitrate, Calcium Ammonium Nitrate, Ammonium Sulfate, Urea, Others], By Form [Solid, Liquid], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Application Mode [Foliar, Fertigation, Others], By Region, Opportunities and Forecast, 2018-2032F

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Report description:

Global nitrogenous fertilizers market is projected to witness a CAGR of 5.69% during the forecast period 2025-2032, growing from USD 70.07 billion in 2024 to USD 109.09 billion in 2032. The market has witnessed significant growth in the last few years, resulting from growing food production and production enhancement demands. The major nitrogen fertilizer groups enable the farmers to supply the soil with the required nitrogen for strong, healthy, and productive growth. The need for improved agricultural productivity to meet food security challenges will continue to be augmented by rising global populations, especially in developing countries.

The market is influenced by many factors, such as new technologies in fertilizer production, government subsidies, and the booming precision agriculture trend that will lead to optimal use of fertilizer in terms of minimized environmental impact. In addition, growing awareness regarding soil health leads to a higher use of efficient and eco-friendly fertilizers. However, nitrogen runoff, emission of greenhouse gases, and use of chemical fertilizers are creating a challenge on environmental grounds, inspiring innovations in controlled-release and organic nitrogenous fertilizers.

Despite factors such as changing raw materials prices and official pressures, nitrogenous fertilizers are critical to global agriculture.

In May 2024, as part of expanding its line of crop nutrition products designed to satisfy the changing demands of regional farmers, Yara Ghana Limited introduced YaraVita CropLift Bio, its newest foliar fertilizer, enhanced with essential nutrients like nitrogen, trace elements including zinc, boron, and magnesium, and secondary elements. Developed to maximize fruit quality and increase

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crop yields, this cutting-edge product gives farmers a flexible option that works with a variety of crops, such as rice, sorghum, millet, maize, fruits, vegetables, and tree crops like cocoa.

Sustainability Trend Catalyzes Market Expansion

The sustainability trend is one of the major drivers of the growth of the nitrogenous fertilizers market, since both consumers and governments are becoming more demanding with respect to green agricultural practices. The pollution of water bodies due to runoff from fertilizer applications, and greenhouse gas emission gets the industry under pressure to adopt more sustainable means. These things have gradually built up towards a transition into precision agriculture, as nitrogen fertilizers are applied more efficiently to achieve greater crop yields but with a minimum impact on the environment. In September 2022, according to the latest report released by the International Fertilizer Association (IFA) in collaboration with Systemiq, greenhouse gas (GHG) emissions can be reduced by 70% by 2050 through the use of mineral nitrogen fertilizer.

In addition, organic fertilizers containing nitrogen from botanical or animal sources have been gaining more popularity as farmers look toward alternative forms as a replacement for the conventional synthetic ones. Also, with governments putting in stricter regulations and incentives for greener practices, the market is further stimulated. Consumers are shifting towards food that is produced sustainably; hence, manufacturers are investing in R&D to find more effective and environmentally friendly fertilizer technologies and solutions. This trend gives a sustainable focus on long-term, responsible growth of the nitrogenous fertilizers market that is in tune with global development goals on food security.

Increased Production Capacity Influences Market Growth

Increased production capacity is vital in the growth of the nitrogenous fertilizers market and in meeting requirements for supplying nutrients to growing agricultural demand. Food requirements are rising continuously globally, especially in developing economies, enhancing the need for more efficient and cost-effective fertilizers. While production increases, companies can increase unit output, thus reducing per-unit production costs to serve the growing numbers of farmers from varying regions. Larger production facilities have become key in increasing the contribution of advanced technologies and sustainable practices in the efficient use of nitrogen fertilizers and their reduced environmental impacts. Initiatives towards establishing new plants have increased investments for production expansion purposes, mainly in key agricultural regions, such as Asia-Pacific and North America. With better logistics and economies of scale, the access of broader markets to nitrogenous fertilizers is enhanced, thus promoting comprehensive agricultural productivity and also stimulating steady market growth.

In April 2024, Nitricity Inc. scaled up its manufacturing capacity with the beginning of its most recent field test of climate-smart nitrogen fertilizer in collaboration with Olam Food Ingredients, Elemental Excelsior, and the Madera/Chowchilla Resource Conservation District. Nitricity's innovative method for creating climate-smart nitrogen fertilizer combines air, water, and renewable electricity. Compared to conventional fertilizers like anhydrous ammonia or calcium nitrate, Nitricity's liquid calcium nitrate solution emits much fewer greenhouse gases.

Urea Holds the Dominant Market Share

The nitrogenous fertilizers market is mostly monopolized by urea as it is a highly concentrated nitrogen fertilizer that is inexpensive and can be applied in various agricultural applications. This includes horticulture, in addition to being an efficient and effective source of nitrogen for staple crops. Hence, farmers around the world prefer urea because of its rapid plant growth, as well as high yield. The widespread agriculture further supports its use. Moreover, urea is less costly to produce, thus it is accessible to both the large and smallholder farmers.

Moreover, gradual progression in urea production technologies such as controlled-release formulations, has positively contributed to the market growth by offering more eco-friendly options. Urea is expected to continue to dominate the global nitrogenous fertilizers market due to being economical and efficient despite the challenges related to nitrogen runoff and greenhouse gas emissions.

In July 2023, low carbon urea was launched by SABIC Agri-Nutrients Company (SABIC AN) and sent to Ravensdown, an agricultural cooperative in Timaru, New Zealand. The entire weight of the shipment was 2,700 tons of urea. In addition to producing urea with low-carbon ammonia, SABIC AN was the first company to obtain an independent low-carbon ammonia accreditation. TÜV Rheinland, an independent testing, inspection, and certification organization, provided the certification.

Asia-Pacific Dominates the Market

Asia-Pacific commands the majority share of the nitrogenous fertilizers market owing to the extensive agricultural practices across

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the region along with a high demand for fertilizers for food production. The region encompasses best-known agricultural countries like China, India, and Indonesia, whereby increasing pressure on feeding the rising population drives the consumption of fertilizers. China and India rank high globally based on the high usage of nitrogenous fertilizers, especially urea, the widely used nitrogenous fertilizer worldwide. More so, modernization in agriculture, like precision agriculture, is a growing trend in the region and allows a further increase in fertilizer use efficiency.

Furthermore, government subsidies and support promote agricultural development in the region to boost fertilizer usage. The vast expanse of arable land in the region and ever-increasing development and urbanization guarantee market expansion.

Sustainability and environment-efficient farming practices will continue to grow as focus areas. Asia-Pacific remains crucial for innovation and growth in the nitrogenous fertilizers sector.

In September 2024, Malaysia's National Farmers' Association (NAFAS) unveiled Peladang 25, their newest nitrogen-based controlled-release liquid fertilizer. It was developed to ensure that the nitrogen content is delivered gradually, providing plants with reliable and effective nourishment during all stages of growth. The fertilizer works well with fungicides and herbicides and is appropriate for crops like pineapple, rice, oil palm, and napier grass.

Future Market Scenario (2025 - 2032F)

□□The demand for eco-friendly and efficient nitrogen fertilizers will be propelled due to an increasing emphasis placed on sustainable agricultural practices. Controlled release fertilizers and organic fertilizers are expected to gain popularity.

□□Innovations introduced in fertilizer manufacturing and application technologies such as precision agriculture and fertigation will enhance the efficiency of nitrogen utilization and minimize environmental footprint.

□□Rising popularity for organic food among consumers will pave the way for organic nitrogen fertilizers, encouraging manufacturers to diversify their products.

Key Players Landscape and Outlook

The nitrogenous fertilizers market is developed by major players in terms of production and innovation, focusing on expanding production capacities, thereby developing technology. These companies usually have broad manufacturing plants, extensive networks for distribution, and significant investments in R&D for improving the efficiency and sustainability of fertilizers.

Innovative product lines are being manufactured to stay ahead in the competitive environment. In June 2023, under the Nova brand name, Evertis International B.V. introduced a new range of cutting-edge foliar and fertigation products in North America, with the goal of delivering high-quality water-soluble N-P-Ks and micronutrients to the crops. The varieties include Nova FLOW, Nova ELEVATE, Nova PULSE, and Nova FINISH. These products are made to be as soluble as possible and to work well with the majority of crop protectants and herbicides. Their main goal is to deliver the crop nutrients more effectively to the site of action. The market outlook looks positive with an increasing demand for fertilizers in developed as well as emerging markets. Key players are focusing more on developing environmentally friendly products like slow-release and organic fertilizers as environmental concerns and regulatory requirements grow. Sustainability has become a priority in agriculture, directing innovation towards reducing nitrogen runoff and improving nutrient use efficiency. Changes within the market will be shaped by different technological advancements, partnerships, and increasing emphasis on higher productivity balanced with environmental responsibility and sustainable long-term growth and expansion in the market.

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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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