

Water Soluble Fertilizers Market Assessment, By Product Type [Nitrogenous, Phosphatic, Potassic, Others], By Form [Solid, Liquid], By Crop Type [Cereals and Grains, Oilseeds and Pulses, Fruits and Vegetables, Others], By Application [Foliar, Fertigation, Others], By Region, Opportunities and Forecast, 2018-2032F

Market Report | 2025-01-09 | 233 pages | Market Xcel - Markets and Data

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Report description:

Global water soluble fertilizers market is projected to witness a CAGR of 6.22% during the forecast period 2025-2032, growing from USD 18.84 billion in 2024 to USD 30.53 billion in 2032. The increasing use of advanced agricultural practices and the growing demand for high-yield crops are contributing to the growth of the market. Water soluble fertilizers dissolve completely in water and are widely used in fertigation and foliar applications. This allows the accurate delivery of nutrients to plants, subsequently increasing crop productivity, reducing nutrient waste, and enhancing the environment, making water soluble fertilizers a modern-day choice among farmers.

Increased awareness of sustainable agricultural farming practices, supported by initiatives focused on optimizing water and fertilizer use in agriculture, are the market driving factors. Nutrient management by horticultural crops such as fruits, vegetables, and ornamental plants is also intensive and requires specialized care, helping to augment this market. Shrinking arable land and rapid urbanization propel the adoption trend towards more efficient fertilizer solutions.

Asia-Pacific, with countries like India and China, is the fastest-growing market, characterized by high population density and increasing food demand, influencing the need for advanced agricultural inputs. North America demonstrates a dominating and stable growth in demand for precision farming technologies. However, the high cost of water soluble fertilizers and limited awareness in developing regions may hamper the growth of this market.

In October 2024, Argus Media Limited, an international agency that collates and reports prices on energy and commodities, launched the world's first weekly price report for the diverse sustainable and specialty fertilizers markets, including water-soluble fertilizers. The new service consists of an exclusive Nutrient Calculator, whereby users will be able to calculate the price base for tailor-made specialty fertilizer products according to their constituent nutrients and other traits.

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Rising Demand for High-Yield Crops Catalyzes Market Expansion

The increasing demand for high-performance crops drives the global water soluble fertilizers market. As world populations continue to grow, the need for efficient agricultural solutions to meet increased food demand will increase. The importance of water soluble fertilizers to efficient crop production lies essentially in their ability to mobilize essential nutrients directly into the plant through fertigation or foliar application. These fertilizers are rapidly absorbed, thus enabling quick and effective uptake of nutrients, making them essential for high-output farming.

This trend emphasizes the better utilization of every arable land available and in-between; the primary benefit is that water soluble fertilizers enable farmers to produce crops more rapidly. This becomes very significant because the conventional farm techniques struggle to match increasing food needs. More so, high-yield crops play a great role in food security, especially for developing regions associated with fast population growth. Water soluble fertilizers, therefore, increase crop quality and output, thus meeting the international demand for food within the context of supporting economic growth and sustainability in agriculture. The increasing demand for high yields in crops will subsequently raise the need to adopt these water soluble forms of fertilizer and boost market growth.

In August 2024, Rallis India Limited, owned by Tata Enterprises, launched AQUAFERT Fertigation-Tomato, a water soluble fertilizer aimed at increasing tomato crop yield. The product promises increased yields and greater quality produce by improving nutrient uptake and offering a comprehensive nutrition solution. Bloom Stage, Fruit Set Stage, and Subsequent Fruit Growth Stage are the three specific water-soluble fertilizer grades that are included in the AQUAFERT Fertigation-Tomato. In comparison to conventional methods, this leads to enhanced vegetative development, increased crop vigor and leaf health, superior fruit setting, uniform and appealing fruit size and appearance, earlier harvest maturity, higher quality yields, and larger returns.

Sustainable Agriculture Trends Influence the Market Growth

The trends in sustainable agriculture are instrumental in bringing out a revolution in the global water soluble fertilizers market. The environmental concern grows, there is a shift towards reduced ecological footprint farming, progressively maintaining and eventually improving productivity. Water soluble fertilizers are geared to sustainability by minimizing nutrient wastage or harmful runoff from fields leading to soil and water pollution. This, in turn, conserves soil health and reduces carbon footprints associated with agriculture and higher productivity levels.

Sustainable agricultural practices, such as integrated nutrient management and organic farming, often incorporate the use of water soluble fertilizers for maintaining the fertility of soil, aimed at reducing dependence on synthetic inputs. The market demand for eco-friendly farming solutions is higher in developed countries with regulatory pressures on agricultural practices and shifts in the preferences of consumers. As sustainable agriculture becomes more commonplace, the acceptance of water soluble fertilizers will also increase, which will contribute to more sustainable agriculture in the long term and to increasing global market figures.

In April 2023, agritech firm Zuari FarmHub announced the launch of Poorna Advanced fertilizer, which is a 100% water soluble fertilizer developed in association with Novozymes South Asia, the industry leader in biological solutions. The innovative and patented LCO Promoter Technology used for formulating the product acts as a signaling mechanism from plant to beneficial microbes in soil proximal to plant roots. Thus, providing a robust root zone increases nutrient uptake and eventually enhances crop resilience.

Nitrogenous Fertilizers Hold the Dominant Market Share

Nitrogenous fertilizers constitute the most significant percentage of the global market in water soluble fertilizers, being instruments of modern agriculture. Nitrogen is one of the primary nutrients for plants as it plays a significant role in processes such as photosynthesis, protein formation, and chlorophyll production. Water soluble nitrogenous fertilizers like urea, ammonium nitrate, and calcium nitrate offer the advantage of being quickly absorbed, making them immediately available to plants. In fact, they are very effective in increasing crop production and improving the health of plants, especially in intensive farming.

The global reliance on staple crops and grains such as wheat, rice, and maize, which require heavy nitrogen applications for their optimum yield, further increases their domination. They fit perfectly along with advanced technologies like fertigation and thus add enormously to their penetration in precision agriculture. Economically employed, farmers regard them as easy to apply and effective in correcting nitrogen deficiencies.

In March 2024, a new facility worth USD 81 million was started by EuroChem Group to produce mostly water soluble fertilizers,

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including potassium nitrate (NOP). Furthermore, by expanding EuroChem's production footprint globally, the project is expected to allow the company to significantly increase its market share in Brazil, where it plans to deliver up to 60% of the products produced at the new plant.

North America Dominates the Market

North America continues to lead the global market for water soluble fertilizers due to its established advanced agricultural practices and by high adoption of precision farming technologies. Infrastructural developments and an emphasis on maximum agricultural productivity have made this region a foremost user of water soluble fertilizers. Fertilizers are used predominantly for high-value crop production, including fruits, vegetables, and horticultural plants, which form a significant portion of the region's agricultural output.

With vast farming activities ongoing in the U.S. and Canada, adoption is growing significantly. Increasing preferences for sustainable and efficient agricultural inputs have also made this a reality. Farmers in North America are realizing the use of water soluble fertilizers to improve nutrient management, mitigate environmental challenges, and develop soil fertility issues. Aligning with the trend, in June 2023, Everris International B.V. introduced a new range of advanced foliar and fertigation water soluble solutions in North America under the Nova brand. The company aimed to supply crops with high-quality, water-soluble N-P-Ks and micronutrients. The varieties include Nova FINISH, Nova PULSE, Nova ELEVATE, and Nova FLOW. These products are developed to achieve maximum solubility and good compatibility with most herbicides and crop protectants, with the primary goal of more effectively delivering crop nutrients to the targeted site of action.

Future Market Scenario (2025 - 2032F)

Advanced agricultural technologies, such as drip irrigation and fertigation, are going to increase the demand for water soluble fertilizers, as these fertilizers can be used with such systems.

An increasing concern of environmentalists and regulatory pressure will fuel the demand for eco-friendly, low-impact fertilizers in the market.

Market advancements will cater to different crops and soil needs through developing nutrient formulations such as slow and controlled release fertilizers.

Key Players Landscape and Outlook

Water soluble fertilizers market contributes to the competitiveness of global and regional players in advancing innovation and market development. Major players are focusing on developing next-generation nutrient formulations including specialty blends and controlled-release fertilizers to meet various crops as well as farming practices. The industry evolves through strategic partnerships, mergers, and acquisitions to increase its presence in the market and expand distribution networks. Investments in research and development are vital to bringing new eco-friendly, super-efficient products in line with sustainability trends and government regulations.

The market outlook remains positive as the adaptation of precision farming and sustainable agriculture practices increases. Likewise, the players focus on consolidating themselves into emerging markets, especially Asia-Pacific, where population growth and food demand create major opportunities within their territories. Such technological improvements, for example, the introduction of water-efficient fertigation systems, open up huge potential for the market. However, the competition remains very stiff among companies trying to come up with possible solutions to high-cost problems and environmental concerns. Finally, the market is set for increased growth and innovation through regional expansion in the future.

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