China Fertilizers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-04-28 | 299 pages | Mordor Intelligence

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Report description:

The China Fertilizers Market size is estimated at 58.78 billion USD in 2025, and is expected to reach 79.08 billion USD by 2030, growing at a CAGR of 6.11% during the forecast period (2025-2030).

Intensive cultivation and monoculture necessitating the fertilizers use

- Due to continuous long-term cultivation without crop rotation, farmland fertility has been depleted and has become more deficient, increasing the need for fertilizers, especially in South China. Due to growing concerns about environmental pollution, there is a rising demand for sustainable fertilizers in field crops.
- Field crops often utilize the greatest nitrogen fertilizers. Due to their extensive cultivation, grains and cereals deplete soil nutrients, requiring the application of additional fertilizers to make up for it. Conventional fertilizers accounted for about 73.3%, and specialty fertilizers accounted for about 26.7% of the total field crops fertilizer market value in 2022.
- Horticultural crops utilize more specialty fertilizers than field crops since they are grown all year long and benefit from superior watering methods like sprinkler and drip irrigation, which encourage the use of water-soluble and liquid fertilizers. About 18.7% of the market value of fertilizers used in horticultural crops was made up of specialty fertilizers in 2021.
- In 2022, less than 1% of the country's total fertilizer market was made up of turf and ornamental products. Over recent years, the government put greater emphasis on self-sufficiency and established a number of methods, such as the production of ornamental flowers in greenhouses, which are expected to support sectoral growth.
- Therefore, it is projected that the segmental growth will be boosted throughout 2023-2030 due to the rising demand from field crops and increased focus on self-sufficiency to reduce the import of ornamentals. The country is the leading producer of fertilizers.

China Fertilizers Market Trends

China's expanding cultivation area is driven by increased food demand and goal to achieve self-sufficiency in staple food

- In China, the cultivation area for field crops decreased from 130.5 million hectares in 2017 to 127.8 million hectares in 2021, representing 71.4% of the total cultivated area. Corn dominated the field crop landscape with a share of 34.2%, followed by rice and wheat at 23.6% and 18.3%, respectively. This expanding cultivation area is projected to drive up fertilizer demand in the country.
- China typically divides its field crop production into two seasons: summer/spring (April-September) and winter. Spring crops encompass early corn, early rice, early wheat, and cotton, while winter crops focus on winter wheat and rapeseed. Rice and corn, however, take precedence in China's agricultural landscape, accounting for a third of the nation's grain output. As the world's leading rice producer, China allocated 30 million hectares for rice farming in 2022, yielding a harvest of 210 million tonnes. Key rice-producing regions span Heilongjiang, Hunan, Jiangxi, Hubei, Jiangsu, Sichuan, Guangxi, Guangdong, and Yunan. China's corn production for 2022-23 is projected to hit 277.2 million tonnes, up by 4.6 million tonnes from the previous year, primarily due to improved harvests. The Northeast provinces of Heilongjiang, Jilin, and Inner Mongolia stand out as major corn-growing regions.
- While spring remains the primary cropping season, it faces some challenges, particularly during the hotter months of June and July. Rice, a staple for millions in China, is particularly affected. The combination of high temperatures and low precipitation exacerbates mineral depletion in the soil, necessitating higher fertilizer application. These dry weather conditions also pose a risk to crop yields.

About 28% of nitrous oxide emissions from cropland in the world are from China's agricultural lands

- Primary nutrients enhance biochemical processes, such as enzyme activity, and foster plant cell growth. Deficiencies in these nutrients can significantly impact plant health, development, and crop yields. In 2022, the average application rate for nitrogen, potassium, and phosphorus combined in field crops stood at 159.9 kg/hectare. Specifically, nitrogen accounted for 65.23%, phosphorus for 28.07%, and potassium for 6.68% of this average.
- Nitrogen takes the lead among primary nutrients, playing a vital role in plant metabolism as a constituent of chlorophyll and amino acids. Its average application rate in 2022 was 279.65 kg/hectare. Potash followed with 105.3 kg/hectare, and phosphorus trailed slightly at 94.9 kg/hectare. The contamination of surface and groundwater with nitrogen and phosphorus has been attributed to inadequate guidance on fertilizer application rates for farmers. Notably, around 28% of global nitrous oxide emissions from croplands originate from China.
- In 2022, cotton, wheat, corn, and rice emerged as the crops with the highest average nutrient application rates, with figures of 255.41 kg/hectare, 232.25 kg/hectare, 198.44 kg/hectare, and 157.76 kg/hectare, respectively. China led the world in cotton production, with a staggering 6.4 million metric tons in 2022. It also held the title of the largest consumer and importer of cotton. Impressively, China accounted for about 20% of global cotton consumption, with a significant 84% of its production hailing from Xinjiang.
- Given the imperative to meet the needs of a growing population, there is an anticipated increase in the application of primary

nutrients in field crops between 2023 and 2030.

China Fertilizers Industry Overview

The China Fertilizers Market is fragmented, with the top five companies occupying 12.84%. The major players in this market are Henan XinlianXin Chemicals Group Company Limited, ICL Group Ltd, Sinofert Holdings Limited, Xinyangfeng Agricultural Technology Co., Ltd. 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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