SCOTTS INTERNATIONAL

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

Market Report | 2025-04-28 | 191 pages | Mordor Intelligence

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Report description:

The China Specialty Fertilizer Market size is estimated at 14.92 billion USD in 2025, and is expected to reach 20.48 billion USD by 2030, growing at a CAGR of 6.54% during the forecast period (2025-2030).

Efficiency in providing particular nutrients and reducing the number of fertilizations may drive the market

- The specialty fertilizer market accounted for about 3.8% of the market volume of the Chinese fertilizer market in 2022. The minimal market share of the specialty fertilizers market is majorly attributed to the less awareness among farmers regarding efficiency and higher cost compared to conventional specialty fertilizers.
- Water-soluble fertilizers accounted for 51.0% of the Chinese specialty fertilizer market volume in 2022. The dominance of water-soluble fertilizers is majorly due to the growing adoption of irrigation agriculture and technical advancements in irrigation equipment. Fertigation is the most popular application mode used in the country's micro irrigation systems. This will drive the soluble fertilizers market during 2023-2030
- Liquid fertilizers accounted for 48.8% of the Chinese specialty fertilizer market volume in 2022. Liquid fertilizers are more easily absorbed by plants and can be used with irrigation or spraying by reducing labor costs. Foliar is the most popular method used by the liquid fertilizer application.
- Controlled-release fertilizers accounted for the next largest market share in the Chinese specialty fertilizer market volume, accounting for 0.1% in 2022. The market share of controlled-release fertilizers is mainly due to their potential to provide nutrients for up to six months. The loss of nutrients is also very low. However, rising awareness among farmers can increase the market share of controlled-release fertilizers in the forecast period.
- In recent years, the soluble fertilizer industry in China has boomed because of its advantages in reducing fertilizer usage, water,

labor, and cost, and increasing yield and quality, accompanied by favorable policies for modern agriculture development and substantial investment.

China Specialty Fertilizer Market Trends

The expansion of the cultivation area is driven by increasing demand for food and the country's goal to achieve self-sufficiency in staple food

- China's cultivation area for field crops expanded marginally from 126.6 million hectares in 2018 to 127.8 million hectares in 2022, representing 70.8% of the nation's total cultivated land. In 2022, corn claimed the largest share at 34.2%, trailed by rice and wheat at 23.6% and 18.3% respectively. This uptick in cultivation area is projected to drive up fertilizer demand in the country.
- China typically divides its field crop production into two seasons: spring/summer (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 dedicated 30 million hectares to rice farming in 2022, yielding a bountiful 210 million tonnes. Key rice-growing regions span Heilongjiang, Hunan, Jiangxi, Hubei, Jiangsu, Sichuan, Guangxi, Guangdong, and Yunnan. China's corn production for 2022-23 was projected to hit 277.2 million tonnes, a 4.6 million-tonne increase from the previous year, buoyed by a successful harvest. The primary corn belts lie in the northeastern provinces of Heilongjiang, Jilin, and Inner Mongolia.
- While spring dominates China's cropping calendar, it faces some challenges during the hotter months of June and July. Given rice's status as a dietary staple for millions, the region's high temperatures and limited rainfall exacerbate mineral depletion in the soil, necessitating higher fertilizer application. These arid conditions can also curtail crop yields.

About 28% of global nitrous oxide emissions from croplands are from China's agricultural lands

- Primary nutrients improve biochemical processes like enzyme activity in plants and promote plant cell growth. Primary nutrient deficiencies can impact plant health, development, and crop production output. The average application rate of nitrogen, potassium, and phosphorus collectively in field crops was 159.9 kg/hectare in 2022. The average primary nutrient application in field crops included 65.23% nitrogen, 28.07% phosphorous, and 6.68% potassium.
- Nitrogen ranks first in primary nutrients, as it is essential for plant metabolism and is a component of chlorophyll and amino acids. Nitrogen had an average application rate of 279.65 kg/hectare. This was followed by potash at 105.3 kg/hectare and phosphorous at 94.9 kg/hectare in 2022. The contamination of surface and groundwater with nitrogen and phosphorus has been considered a result of inadequate advice given to farmers regarding fertilizer application rates. About 28% of global nitrous oxide emissions from croplands are from China's agricultural lands.
- In 2022, the crops with the highest average nutrient application rates were cotton (255.41 kg/hectare), wheat (232.25 kg/hectare), corn (198.44 kg/hectare), and rice (157.76 kg/hectare). In 2022, cotton production amounted to 6.4 million metric tons, making China the world's largest producer, consumer, and importer of cotton. Around 20% of the cotton consumed worldwide is produced in China, and 84% of that production comes from Xinjiang.

- To meet the demands of a growing population, boosting crop production is essential; as a result, the application of primary nutrients in field crops is expected to grow from 2023 to 2030.

China Specialty Fertilizer Industry Overview

The China Specialty Fertilizer Market is fragmented, with the top five companies occupying 5.01%. The major players in this market are Hebei Monband Water Soluble Fertilizer Co. Ltd, Hebei Woze Wufeng Biological Technology Co., Ltd, Henan XinlianXin Chemicals Group Company Limited, ICL Group 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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