SCOTTS
INTERNATIONAL

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

Market Report | 2025-04-28 | 346 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

The Europe Fertilizers Market size is estimated at 55.27 billion USD in 2025, and is expected to reach 72.27 billion USD by 2030, growing at a CAGR of 5.51% during the forecast period (2025-2030).

The use of soil-applied fertilizers is more in field crops

- In 2022, field crops accounted for 84.2% of the fertilizer market value and are expected to grow by 80.6% during the study period. To increase yield, farmers are applying both conventional and specialty fertilizers. Most conventional fertilizers, which accounted for 87.3% of the market value in 2022, are applied to the soil for field crops.
- The area under fruit and vegetable cultivation in the region decreased by 2.24% from 2016 to 2020. According to Eurostat, almost 90% of European consumers over the age of 15 fail to eat adequate amounts of fruit and vegetables.
- Also, the decreased consumption of fruits and vegetables in the region resulted in a decrease in producer organizations from 1,712 in 2016 to 1,604 in 2020. Hence, the decreased consumption and area under cultivation are anticipated to result in marginal growth of the segment between 2023 and 2030. Producing in countries within close distance of Europe has become an attractive and economical option for European companies. Due to their low production costs, they can produce fresh fruit and vegetables early in the season when European produce is not yet ready for the market. This offers opportunities for nearby suppliers such as Egypt, Morocco, Tunisia, and Turkey.
- The turf and ornamental segment of the market accounted for 6.1% of the overall fertilizer market in 2022. Ornamental production in the region increased by 9.3% from 2016 to 2019 and is anticipated to boost the segment with a CAGR of 4.6% from 2023 to 2030.
- Hence, based on the aforementioned characteristics, the field crop and turf and ornamental fertilizer consumption is anticipated

to grow significantly between 2023 and 2030.

The increasing need for higher food production and productivity is driving the growth of the market

- France is one of the largest fertilizer-consuming countries in Europe, with an overall share of 11.7% in 2022. The market value was expected to reach USD 7.8 billion in the same year, with a 4.8% Y-o-Y growth. Among all countries, it stands second in terms of volume consumption after Russia.
- Ukraine accounted for 10.6% of the total fertilizer consumption in Europe in 2022, with a volume consumption of 8.7 million metric tons. This may be due to the cultivation of high fertilizer-consuming crops like wheat, maize, and other field crops, which account for more than 90% of the area under cultivation.
- The fertilizer market in Europe was valued at USD 65.1 billion in 2022, with a volume consumption of 81.7 million tons in the same year. The market has observed an increasing trend since 2017, with a dip in 2020 due to supply chain disruptions during the COVID-19 pandemic. The ongoing war in Russia-Ukraine and the sanctions imposed on Russia by various European countries may further affect the supplies from Russia, which is one of the important producers and suppliers of fertilizer to the European and international markets.
- The heatwaves and droughts in various parts of Europe are expected to affect production in the coming years, which may lead to less usage of fertilizers in the region, slightly hindering the market growth.
- Factors like the growing population's need for higher food production and productivity amid the decreasing area under cultivation are expected to drive the market. The adoption of advanced cultivation methods will also increase the usage of specialty fertilizers. Therefore, the market is projected to register a CAGR of 5.3% between 2023 and 2030.

Europe Fertilizers Market Trends

The cultivation area of field crops is steadily expanding to meet domestic needs and export demand

- In Europe, field crops like rapeseed, wheat, rye, and triticale are predominantly grown in winter, while maize, sunflowers, rice, and soybean are summer crops. Barley, both winter and spring varieties, are widely cultivated. The region has witnessed a steady rise in the area dedicated to major food crops, driven by population growth and increasing food grain demand. In 2017, the area under field crops stood at 78.5 thousand ha, which climbed to 108 thousand ha by 2022.
- In 2021, the European Union harvested 129.9 million tonnes of common wheat and spelt, accounting for 43.7% of all cereal grains harvested. This marked an increase of 11.0 million tonnes, a growth rate of 9.3%, compared to 2020. The uptick was fueled by a 5.6% expansion in the harvested area, reaching 21.8 million hectares, and improved apparent yields.
- In 2021, the EU's production of grain maize and corn cob mix reached 73.0 million tonnes, up by 6.0 million tonnes from 2020. This overall surge was primarily driven by significant production rebounds in Romania (up by 46.8%, an additional 4.7 million tonnes) and France (up by 14.5%, an additional 1.9 million tonnes).
- Between 2019 and 2022, the harvested area in the region witnessed a notable 34% decline. However, despite this overall reduction, the acreages dedicated to corn/maize and wheat cultivation saw increases of 11% and 2%, respectively, while other field crops saw a decrease. Farmers are expected to increase their fertilizer usage during the study period. This move is driven by their goal to boost yields, especially in light of the declining harvested areas seen in recent years.

The prevalence of nitrogen deficiency in the soil facilitates the market's growth

- Field crops consumed the highest amount of primary nutrients in Europe, accounting for 85% share, with a volume consumption of 47 million metric tons in 2022. This is attributed to the large area under field crops and the large amounts of primary nutrients required by these crops. Key field crops in the region include wheat, rapeseed, rye, soybean, and corn, all of which exhibit substantial fertilizer consumption. In 2022, these crops had an average nutrient application rate of 187.3 kg per hectare, encompassing nitrogen, phosphorous, and potassium.
- Nitrogen emerged as the primary nutrient fertilizer for European field crops, with an average application rate of 130.64 kg/hectare in 2022. Nitrogen deficiency poses the most significant yield limitation, given its prevalence in agricultural soils. Consequently, it remains the most widely applied fertilizer in the region. Following nitrogen, potassium took the lead as the second most utilized fertilizer, with an average application rate of 103.75 kg/hectare in 2022. Notably, countries like Sweden, Spain, Poland, and Latvia face more pronounced potassium deficiencies, primarily due to their sandy soil composition. Phosphatic fertilizers trailed behind with an application rate of 56.93 kg/hectare in 2022.
- Primary nutrient fertilizers hold paramount importance for crops, serving critical roles in metabolic processes, tissue formation (such as cells, cell membranes, and chlorophyll), and crop quality. Phosphorous is particularly crucial for cultivating high-quality crops, while potassium aids in enzyme activation for plant growth and development.

Europe Fertilizers Industry Overview

The Europe Fertilizers Market is fragmented, with the top five companies occupying 26.86%. The major players in this market are CF Industries Holdings, Inc., EuroChem Group, ICL Group Ltd, OCI NV and Yara International ASA (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

Table of Contents:

4.2.2.1 Field Crops
4.2.2.2 Horticultural Crops
4.2.3 Secondary Macronutrients
4.2.3.1 Field Crops
4.2.3.2 Horticultural Crops
4.3 Agricultural Land Equipped For Irrigation
4.4 Regulatory Framework
4.5 Value Chain & Distribution Channel Analysis

5 MARKET SEGMENTATION (includes market size in Value in USD and Volume, Forecasts up to 2030 and analysis of growth prospects)
5.1 Type
5.1.1 Complex
5.1.2 Straight
5.1.2.1 Micronutrients
5.1.2.1.1 Boron
5.1.2.1.2 Copper
5.1.2.1.3 Iron
5.1.2.1.4 Manganese
5.1.2.1.5 Molybdenum
5.1.2.1.6 Zinc
5.1.2.1.7 Others
5.1.2.2 Nitrogenous
5.1.2.2.1 Ammonium Nitrate
5.1.2.2.2 Anhydrous Ammonia
5.1.2.2.3 Urea
5.1.2.2.4 Others
5.1.2.3 Phosphatic
5.1.2.3.1 DAP
5.1.2.3.2 MAP
5.1.2.3.3 SSP
5.1.2.3.4 TSP
5.1.2.3.5 Others
5.1.2.4 Potassic
5.1.2.4.1 MoP
5.1.2.4.2 SoP
5.1.2.4.3 Others
5.1.2.5 Secondary Macronutrients
5.1.2.5.1 Calcium
5.1.2.5.2 Magnesium
5.1.2.5.3 Sulfur
5.2 Form
5.2.1 Conventional
5.2.2 Speciality
5.2.2.1 CRF
5.2.2.2 Liquid Fertilizer
5.2.2.3 SRF

8.6 Glossary of Terms

SCOTTS INTERNATIONAL

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

Market Report | 2025-04-28 | 346 pages | Mordor Intelligence

To place an Order with Scotts International:
- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.
** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2026-03-02
		Signature	

Scotts International. EU Vat number: PL 6772247784
tel. 0048 603 394 346 e-mail: support@scotts-international.com
www.scotts-international.com