

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

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### **Report description:**

The Europe Specialty Fertilizer Market size is estimated at 7.25 billion USD in 2025, and is expected to reach 9.65 billion USD by 2030, growing at a CAGR of 5.89% during the forecast period (2025-2030).

The specialty fertilizer market is driven by the growing concern over environmental pollution and rising demand high nutrient efficient fertilizers

- In 2022, specialty fertilizers represented 13.0% of the overall fertilizer market value in the region, a stark contrast to the dominant conventional fertilizers. This disparity can be attributed to the higher costs of specialty fertilizers and limited awareness among farmers.
- From 2017 to 2021, the specialty fertilizers market experienced notable growth, surging by 80.4% in 2022 compared to 2017. This upswing can largely be credited to the increasing adoption of irrigation agriculture and sustainable farming practices.
- In terms of market value, liquid fertilizers held the lion's share at 48.8% in 2022, while water-soluble fertilizers dominated the market volume at 48.9%. Liquid fertilizers commanded higher prices, with an average of USD 1,051.2 per metric ton, compared to water-soluble fertilizers priced at USD 883.4. This price discrepancy, coupled with their affordability relative to other specialty fertilizers, led to a higher utilization of water-soluble fertilizers.
- Water-soluble fertilizers were predominantly employed for secondary macronutrient applications in 2022, accounting for 53.2% of the total secondary macronutrient fertilizers in the region. Similarly, they constituted 53.1% of the total micronutrient fertilizers in Europe.
- The adoption of controlled-release fertilizers is on the rise in the region, driven by their environmental risk reduction and water contamination mitigation benefits. As a result, the market value of these fertilizers is projected to record a CAGR of 7.7% during

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2023-2030.

- Given the burgeoning market potential for specialty fertilizers, this segment is poised for significant growth in the coming years.

The growing adoption of modern farming practices is driving market growth due to its less impact on the environment

- Specialty fertilizers enhance soil fertility, boost plant growth, and maximize yields. Overuse of fertilizers leads to nutrient loss and water contamination. Specialty fertilizers mitigate these issues and enhance nutrient uptake by plants.
- In 2022, Ukraine accounted for the share of 14.9% of the European specialty fertilizer market in terms of value. The nitrogen fertilizer segment occupied the largest share of the market studied. Due to a shift toward decarbonization of energy in Europe, the demand for 'green' ammonia fertilizers is expected to grow during 2023-2030.
- Field crops dominated the European specialty fertilizer market in 2022, accounting for 82.4% of the consumption volume, followed by horticultural crops at 9.8%. The dominance of field crops is attributed to their larger cultivation areas.
- In 2022, water-soluble fertilizers claimed the largest market volume share at 48.9%, followed by liquid fertilizers at 45.0%. Controlled-release fertilizers (CRF) and slow-release fertilizers (SRF) held smaller shares at 4.7% and 1.3%, respectively. Water-soluble fertilizers can be applied either through foliar spraying or fertigation, and their popularity has surged with the rising adoption of irrigation practices.
- European soils are increasingly losing fertility due to continuous cropping without adequate recovery periods. Specialty fertilizers provide timely nutrition while minimizing environmental impact. These factors are projected to drive the specialty fertilizers market, with an estimated CAGR of 5.7% during 2023-2030.

#### Europe Specialty Fertilizer Market Trends

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

- Field crops, such as rapeseed, wheat, rye, and triticale, are mainly winter crops in Europe, while maize, sunflowers, rice, and soybean are summer crops. Both the winter and spring types of barley are widely available. The area harvested under major food crops in Europe has been steadily increasing, primarily due to the growing population and increasing demand for food grains. Field crops accounted for 78.5 thousand ha in 2017, which increased to 108 thousand ha in 2022.
- The EU harvested 282.7 million ton of common wheat in 2022, the equivalent of 54.0% of all cereal grains harvested. This was 11.0 million ton more than in 2020, an increase of 9.3%. This upturn reflected a rise in the area harvested (+5.6 % to 21.8 million hectares) and improved apparent yields.
- Between 2019 and 2022, there was a notable 34% decline in the harvested area within the region. Despite this overall reduction, the areas dedicated to corn/maize and wheat cultivation experienced increases of 11% and 2%, respectively, while the other field crop acreages decreased during the same period. It is anticipated that farmers will augment their fertilizer usage in the upcoming forecast period, aiming to enhance yields and mitigate the impact of the overall decrease in harvested areas observed in recent years.
- Therefore, with rising pressure on farmers to improve yield and grain production to meet the growing demand with growing overall field crop cultivation area, the fertilizer market is expected to grow significantly during 2023-2030.

Nitrogen is the primary nutrient consumed more in field crops as most of the soil in the region is deficient in nitrogen

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- In 2022, field crops dominated nutrient consumption in Europe, accounting for 85% of the total and reaching a volume of 47 million metric tons. This high demand can be attributed to both the extensive cultivation of field crops and their significant nutrient requirements. The primary field crops in Europe include wheat, rapeseed, rye, soybean, and corn, all of which have a substantial appetite for fertilizers. In 2022, these crops had an average nutrient application rate of 187.3 kg per hectare for nitrogen, phosphorous, and potassium.
- Nitrogen emerged as the most in-demand 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 constraint, as a majority of agricultural soils in the region lack sufficient nitrogen levels. Following nitrogen, potassium stood out as the second most utilized fertilizer, with an average application rate of 103.75 kg/hectare in 2022. Countries like Sweden, Spain, Poland, and Latvia, with a prevalence of sandy soils, faced more pronounced potassium deficiencies. Phosphatic fertilizers trailed behind with an application rate of 56.93 kg/hectare in 2022.
- Primary nutrient fertilizers hold immense significance for crops, as they are vital for metabolic processes and contribute to the formation of crucial plant tissues, such as cells, cell membranes, and chlorophyll. Phosphorous plays a pivotal role in cultivating high-quality crops, while potassium activates enzymes essential for plant growth and development.

## Europe Specialty Fertilizer Industry Overview

The Europe Specialty Fertilizer Market is moderately consolidated, with the top five companies occupying 56.79%. The major players in this market are EuroChem Group, Fertiberia, ICL Group Ltd, Kingenta Ecological Engineering Group 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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