

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

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Report description:

The Foliar Fertilizer Market size is estimated at 21.34 billion USD in 2025, and is expected to reach 28.72 billion USD by 2030, growing at a CAGR of 6.12% during the forecast period (2025-2030).

The various benefits associated with a foliar application are driving the adoption of the foliar method

- The field crops segment accounted for 78.4% of the overall foliar fertilizer market value in 2022. More than 85% of the world's agricultural acreage is focused on the cultivation of field crops, which accounts for the huge use of foliar fertilizers by these crops.
- Asia-Pacific and North America together held a market value share of 70.2% in 2022 of the total foliar field crop market. This was due to the presence of a large field crop cultivation area, which accounted for about 58.0% of the total field crop cultivation area worldwide during the same period. North America accounted for 26.8%, and Asia-Pacific accounted for a share of 43.3% of the usage of foliar fertilizers in field crops in 2022.
- The horticultural crops held a value share of 18.2% of the global foliar fertilizer value and accounted for USD 4.37 billion in 2022. Foliar fertilization allows for precise and targeted nutrient delivery directly to the plant's leaves. This is particularly beneficial in horticulture, where specific nutrient requirements for different crops and stages of growth need to be met. Furthermore, the foliar application provides a quick response to nutrient deficiencies, ensuring that plants receive essential nutrients when they need them most. Due to these factors, the adoption of foliar fertilizers is growing significantly across the region.
- The demand for foliar fertilizers in the turf and ornament crop segment is projected to register a CAGR of 5.9% in terms of value from 2023 to 2030. This uptick is driven by the increasing demand for ornamentals to enhance aesthetics and quality of life, as well as the need for turf maintenance in public spaces.

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The rising prevalence of soil nutrient deficiencies is driving the demand for foliar fertilizers

- Foliar application of fertilizers is a widely adopted practice in global crop production, especially in the cereal and horticulture industries. This method offers a swift response to nutrient deficiencies, ensuring plants receive vital nutrients at critical growth stages.
- In 2022, Asia-Pacific held the largest share in the foliar fertilizer market, reaching a value of USD 11.3 billion, with a consumption volume of 11.9 million metric tons. Field crops accounted for the majority share, capturing 72.4% of the market, valued at USD 8.2 billion.
- Europe, a significant player in the foliar fertilizer market, held a 16.0% market value share in 2022, witnessing a robust growth of 76.9% during the study period. Micronutrient deficiencies, particularly in manganese, zinc, and iron, have been a concern for crop quality and yield in several European regions. Studies indicate that around 60.0% and 28.0% of the region's soil had insufficient iron and zinc levels, respectively, underscoring the market's growth drivers.
- South America contributed 5.8% to the global foliar market. During the study period, the region saw a notable uptick, with the foliar market growing by 62.1% and consumption by volume rising by 27.1%. Projections indicate a 5.9% CAGR for the market value from 2023 to 2030.
- The global demand for foliar fertilizers is set to rise, driven by the adoption of precision farming, protected agriculture, and a heightened need for soil micronutrients to enhance agricultural yields. Foliar fertilization, with its targeted nutrient delivery to leaves, is expected to fuel this demand, leading to a projected 5.9% CAGR from 2023 to 2030.

Global Foliar Fertilizer Market Trends

The rising pressure on the agriculture industry to meet the growing demand for food is expected to increase the area under field crop cultivation

- The global agricultural sector is facing many challenges. According to the UN, the world population may exceed 9 billion by 2050. This population growth may overburden the agricultural industry, which is already experiencing an output loss due to a lack of laborers and the shrinkage of agricultural fields caused by rising urbanization. According to the Food and Agriculture Organization, 70% of the global population is expected to live in cities by 2050. Due to the global loss of arable land, farmers now need to utilize more fertilizers to increase crop yields.
- Asia-Pacific is the world's largest producer of agricultural products. Agriculture is critical to the region's economy, as it employs about 20% of the total available workforce. Field crop cultivation dominates the region, accounting for about more than 95% of the total crop area in the region. Rice, wheat, and corn are the major field crops produced in the region, together accounting for about 24.3% of the total crop area in 2022.
- North America ranks as the second-largest arable region globally. Its farms cultivate a diverse range of crops, with a focus on field crops. Notably, corn, cotton, rice, soybean, and wheat are the prominent field crops, as highlighted by the USDA. In 2022, the United States commanded 46.2% of North America's crop cultivation area. However, the country witnessed a significant drop in crop acreage between 2017 and 2019, primarily due to adverse environmental conditions, leading to severe flooding in regions like Texas and Houston.

The global average application rate of primary nutrient nitrogen, potassium, and phosphorus in field crops is 164.31 kg/ha

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- Corn, rapeseed, cotton, sorghum, rice, wheat, and soybean are among the primary nutrient-intensive crops globally. In 2022, the average primary nutrient application rates for these crops were as follows: corn - 230.57 kg/ha, rapeseed - 255.75 kg/ha, cotton - 172.70 kg/ha, sorghum - 158.46 kg/ha, rice - 154.49 kg/ha, wheat - 135.35 kg/ha, and soybean - 120.97 kg/ha. Primary nutrients are vital for crops as they facilitate essential plant metabolic processes and contribute to the formation of crucial tissues like cells, cell membranes, and chlorophyll. Notably, phosphorus is pivotal for cultivating high-quality crops, while potassium plays a key role in activating enzymes necessary for plant growth.
- On a global scale, field crops have an average application rate of 164.31 kg/ha for nitrogen, potassium, and phosphorus. Nitrogen takes the lead as the most widely used primary nutrient fertilizer, with an application rate of 224.6 kg/ha in 2022. Potassic fertilizers follow, with an application rate of 150.3 kg/ha, and phosphorus ranks third, with an application rate of 117.9 kg/ha.
- In 2022, rapeseed had the highest nitrogen application rate at 347.4 kg/ha. Corn led in phosphorus application, with a rate of 156.3 kg/ha, while canola topped the charts for potassium application at 248.6 kg/ha. Field crop cultivation is on the rise globally, with notable growth in South America and the Asia-Pacific region. These regions are emerging as potential markets for fertilizers. Developed regions like Europe and North America, along with areas facing nutrient deficiencies, are increasingly adopting specialty fertilizers for their efficacy. These trends are expected to propel the primary nutrient fertilizers market from 2023 to 2030.

Foliar Fertilizer Industry Overview

The Foliar Fertilizer Market is fragmented, with the top five companies occupying 32.55%. The major players in this market are ICL Group Ltd, Indian Farmers Fertiliser Cooperative Limited, Sociedad Quimica y Minera de Chile SA, The Mosaic Company 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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