

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

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Report description:

The Germany Fertilizer Market size is estimated at 5.31 billion USD in 2025, and is expected to reach 6.65 billion USD by 2030, growing at a CAGR of 4.59% during the forecast period (2025-2030).

Intensive agricultural practices are increasing fertilizer consumption

- Germany ranks as the fourth largest agricultural nation in the European region, with agriculture occupying over 57% of its land. The country boasts nearly 276,000 small farms, averaging 61 hectares each. Given the diverse soil types, farmers tailor their fertilizer usage to address nutrient deficiencies and optimize crop growth and quality.
- In recent years, Germany has seen a notable surge in fertilizer utilization. In 2022, fertilizer usage rose by 2.9% compared to the previous year, largely influenced by the country's climatic conditions. Farmers struggled with droughts and heatwaves and relied heavily on fertilizers and crop protection products to safeguard food security.
- In 2022, field crops dominated fertilizer consumption, accounting for 56.4%. This is primarily due to their expansive cultivation areas, intensive agricultural practices, and the need to address nutrient deficiencies resulting from continuous cultivation. Wheat, barley, rapeseed, and soybean take the lead as major crops. Germany's emphasis on domestic legume production, achieved through expanding cultivation areas, is set to drive the field crops market with a projected CAGR of 3.7% from 2023 to 2030.
- The turf and ornamental crop segment claims the second-largest market share in Germany, standing at 35.9% in 2022. These crops are witnessing heightened demand across various applications. Farmers, in response, are increasingly relying on crop nutrition to ensure robust growth and quality. This rising demand is poised to propel the market in the coming years.

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Germany Fertilizer Market Trends

Droughts and heat waves impacted the cultivation of field crops

- In 2022, field crops dominated Germany's cultivation area, accounting for 78.2%. This prominence can be attributed to their dual significance in guaranteeing food security and serving as economically vital crops for the agricultural sector. A substantial decline in the cultivation area of field crops was observed during the study period. In 2017, the total cultivation area dedicated to field crops accounted for 7.35 million hectares, but by 2022, it had reduced by 1.61 million hectares and reached 5.74 million hectares. This noteworthy reduction in the country's field crop acreage can be attributed to the adverse impacts of recent droughts and persistent heat waves, which led to significant yield losses. Consequently, farmers opted to reduce their cultivation areas in response to these challenging climatic conditions. Wheat, rapeseed, corn, and soybean are major cultivating crops.
- Wheat takes the lead as the most extensively cultivated crop and is the region's second-largest producer. In 2022, the wheat cultivation area comprised a substantial 49.8% of the total cultivated land. This predominance can be majorly attributed to the escalating demand for wheat both within the domestic market and on the international market. The wheat cultivation area reduced drastically by approximately 7% compared to the year 2017. In 2022, it accounted for 2.98 million hectares, which is majorly due to a reduction in summer wheat harvesting area, down by 45%, and winter wheat harvesting area by 1.4%, due to dry and hot climatic conditions.
- The legume crop cultivation area increased in 2022 by 46.3%, which was majorly due to the country's dependence on domestic production.

Nitrogen is the main primary nutrient consumed by the field crops

- In the year 2022, the average nutrient application rate of field crops stood at 177.2 kg per hectare in Germany. Notably, corn, rice, wheat, sorghum, soybean, rapeseed, and cotton represent the primary field crops cultivated, and they demand higher nutrient levels to support their growth. The nutrient deficiency arising from intensive agricultural practices and the continuous cultivation of major crops, such as wheat, necessitates an increased application of nutrients. This situation calls for higher nutrient input to maintain soil fertility.
- Nitrogen stands out as the predominant nutrient consumed by field crops among all the primary nutrients. The average nutrient application rate for nitrogen is a substantial 274.7 kg per hectare. The country's soils experience nitrogen deficiency due to its high pH levels, sandy soil composition, and persistent dry conditions resulting from recurrent droughts. These factors collectively drive an increased demand for nitrogen nutrients in the country's agricultural practices. Potash is the second most consumed primary nutrient, with an average nutrient application rate of 142.9 kg per hectare, and phosphorus consumption accounts for 114.1 kg per hectare.
- The country holds a prominent position as a leading producer of oil rapeseed within the region. The rapeseed crop exhibits the highest average nutrient application rate, reaching 290.5 kilograms per hectare. The oil rapeseed crop relies heavily on nitrogen. It is notable that the average nutrient application rate for this crucial nutrient stands at 393.7 kilograms per hectare. This crop heavily depends on nitrogen fertilization due to its lower nutrient use efficiency, and while this enhances protein content.

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Germany Fertilizer Industry Overview

The Germany Fertilizer Market is fragmented, with the top five companies occupying 32.74%. The major players in this market are AGROFERT, EuroChem Group, Grupa Azoty S.A. (Compo Expert), K+S Aktiengesellschaft 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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