

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

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Report description:

The India Fertilizers Market size is estimated at 45.89 billion USD in 2025, and is expected to reach 62.83 billion USD by 2030, growing at a CAGR of 6.49% during the forecast period (2025-2030).

Rice is a major NPK-consuming crop that is expected to drive the nation's fertilizer demand

- In 2022, field crop fertilizers dominated the market, accounting for 89.2%, and are projected to record a CAGR of 9.8% during 2023-2030. Rice, the leading field crop, witnessed a substantial surge in cultivation, with 47 million hectares planted in 2022, marking a 93.1% increase from 2017. Given rice's significant reliance on NPK fertilizers, it is poised to be a key driver of fertilizer demand in the country.
- The area dedicated to field crops expanded from 187 million hectares in 2017 to 194 million hectares by 2022. Cereals, within the field crop category, commanded a substantial share. This surge in field crop cultivation, driven by the need to feed a growing population, is expected to propel India's fertilizer market in the coming years.
- In 2022, horticultural crop fertilizers represented 10.5% of the Indian fertilizer market, valued at USD 5.02 billion. The area under horticulture cultivation witnessed a modest rise, reaching 8.9 million hectares in 2022 from 8.6 million hectares in 2017. This uptick in horticulture acreage is accompanied by a parallel rise in fertilizer consumption aimed at maximizing yields.
- The turf and ornamental crop fertilizer segment in India, though a small fraction, was valued at USD 74.8 million in 2021. The government's emphasis on self-sufficiency has led to initiatives like promoting greenhouse ornamental flower production, hinting at potential growth in this segment.
- With the rising demand for major field crops and the expansion of fruit and turf cultivation areas, this segment is poised for significant growth. The projected CAGR during 2023-2030 is 6.4% for field crops and 4.0% for fruits and turf.

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India Fertilizers Market Trends

The rising consumer demand domestically and internationally is the major driving factor for the rising acreage in India

- During the study period, the country witnessed a 6% increase in field crop cultivation. This surge in the cultivation of cereals, pulses, and oilseeds, driven by both domestic and international consumer demand, played a pivotal role in expanding the acreage.
- Breaking down the crops, rice, wheat, and soybean dominated the country's agricultural landscape in 2022, accounting for 25.4%, 17.4%, and 7.5%, respectively. Rice, a staple in India, commands a significant share, covering a quarter of the total cropped area and feeding nearly half the population. It finds cultivation across the nation, with key states being West Bengal, Uttar Pradesh, Andhra Pradesh, Punjab, and Tamil Nadu. However, India's rice production dipped by 6% (104.99 million tons) in the kharif season of 2022, primarily due to reduced paddy acreage in states like Jharkhand, Madhya Pradesh, and West Bengal, grappling with rainfall deficits.
- Punjab, West Bengal, Haryana, and Rajasthan emerge as the primary wheat cultivators in India. From 2017 to 2022, wheat cultivation in India witnessed a 5% increase. However, the wheat output dipped to 107.74 million tonnes in 2022 from the previous year's 109.59 million tonnes. This decline can be attributed to heavy rainfall and hailstorms that battered the fertile plains of northern, central, and western India. These natural calamities inflicted significant damage on the maturing winter-planted crops, including wheat, leading to substantial losses for farmers.
- Given the robust cereal cultivation in India, bolstered by surging domestic and international demand, the Indian fertilizer market is poised for growth during 2023-2030.

Among the primary nutrients, nitrogen is the most-applied nutrient in field crops, with an average application rate of 223.5 kg per hectare

- In 2021, the average application rate for primary nutrients stood at 125.1 kg/ha. Notably, nitrogen topped the list with an average application rate of 223.5 kg/ha. Given the intensive cultivation of crops like rice in the country, it is no surprise that nitrogen, being a crucial nutrient, plays a pivotal role. However, the deficiency of this nutrient in the soil is hampering rice productivity nationwide.
- The soil health in India, as highlighted in the State of Biofertilizers and Organic Fertilizers report, is a cause for concern. It reveals a rising trend in the consumption of chemical fertilizers, with 97.0%, 83.0%, and 71.0% of tested soils showing deficiencies in nitrogen, phosphorous, and potassium, respectively.
- Among the major crops, wheat, rice, and corn/maize led the pack in nutrient application rates in 2021, with averages of 231, 156, and 149 kg/ha, respectively. Wheat and rice, being staple foods both domestically and globally, face significant yield and profit reductions due to multiple nutrient deficiencies. Apart from nitrogen, phosphorous, and potassium, these crops also rely on micronutrients like sulfur, boron, iron, and zinc for optimal growth. Given the critical role of nutrient management in successful crop production, the market is witnessing growth.
- Field crops, especially grains and cereals, have a voracious appetite for primary nutrients, particularly nitrogen fertilizers. With

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the extensive cultivation of these crops depleting the soil's nutrient content, the demand for fertilizers is expected to surge during 2023-2030, driving market growth.

India Fertilizers Industry Overview

The India Fertilizers Market is fragmented, with the top five companies occupying 27.78%. The major players in this market are Chambal Fertilizers & Chemicals Ltd, Coromandel International Ltd., ICL Group Ltd, Indian Farmers Fertiliser Cooperative Limited and National Fertilizers Ltd (sorted alphabetically).

Additional Benefits:

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

Table of Contents:

1 EXECUTIVE SUMMARY & KEY FINDINGS

2 REPORT OFFERS

3 INTRODUCTION

3.1 Study Assumptions & Market Definition

3.2 Scope of the Study?

3.3 Research Methodology

4 KEY INDUSTRY TRENDS

4.1 Acreage Of Major Crop Types

4.1.1 Field Crops

4.1.2 Horticultural Crops

4.2 Average Nutrient Application Rates

4.2.1 Micronutrients

4.2.1.1 Field Crops

4.2.1.2 Horticultural Crops

4.2.2 Primary Nutrients

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

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- 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 Urea
 - 5.1.2.2.2 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 Others
 - 5.1.2.4 Potassic
 - 5.1.2.4.1 MoP
 - 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
 - 5.2.2.4 Water Soluble
- 5.3 Application Mode
 - 5.3.1 Fertigation
 - 5.3.2 Foliar
 - 5.3.3 Soil
- 5.4 Crop Type
 - 5.4.1 Field Crops
 - 5.4.2 Horticultural Crops
 - 5.4.3 Turf & Ornamental

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles
 - 6.4.1 Chambal Fertilizers & Chemicals Ltd
 - 6.4.2 Coromandel International Ltd.
 - 6.4.3 Gujarat Narmada Valley Fertilizers & Chemicals Ltd

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- 6.4.4 Haifa Group
- 6.4.5 ICL Group Ltd
- 6.4.6 Indian Farmers Fertiliser Cooperative Limited
- 6.4.7 National Fertilizers Ltd
- 6.4.8 Rashtriya Chemicals & Fertilizers Ltd
- 6.4.9 Sociedad Quimica y Minera de Chile SA
- 6.4.10 Yara International ASA

7 KEY STRATEGIC QUESTIONS FOR FERTILIZER CEOS

8 APPENDIX

- 8.1 Global Overview
 - 8.1.1 Overview
 - 8.1.2 Porter's Five Forces Framework
 - 8.1.3 Global Value Chain Analysis
 - 8.1.4 Market Dynamics (DROs)
- 8.2 Sources & References
- 8.3 List of Tables & Figures
- 8.4 Primary Insights
- 8.5 Data Pack
- 8.6 Glossary of Terms

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