

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

Market Report | 2025-04-28 | 316 pages | Mordor Intelligence

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Report description:

The Middle East & Africa Fertilizers Market size is estimated at 54.77 billion USD in 2025, and is expected to reach 77.84 billion USD by 2030, growing at a CAGR of 7.28% during the forecast period (2025-2030).

Field crops dominated the market owing to their larger cultivation area

- The overall fertilizer market is estimated to register a CAGR of 7.0% from 2023 to 2030. Agriculture is by far the single most important economic activity in Africa. It provides employment for about two-thirds of the continent's working population, and for each country, it contributes an average of 30-60% of the gross domestic product and 30.0% of the value of exports.
- Africa is regarded as a key center of agricultural production because of the availability of arable land. However, only 6.0% of cultivated land in Africa is irrigated. In 2018, Sub-Saharan Africa's average fertilizer consumption stood at 17.0 kg of nutrients per hectare, significantly lower than the global average of 135.0 kg/ha.
- The Middle East predominantly cultivates staple crops like wheat and barley. Additionally, Egypt and Saudi Arabia lead in the production of rice, maize, lentils, chickpeas, vegetables, and fruits. Africa, on the other hand, boasts a diverse vegetable range, including tomatoes, onions, cabbages, peppers, okra, eggplants, and cucumbers. Notably, tomatoes and onions thrive in abundance along North Africa's coastal regions. Africa's notable beverage crops encompass tea, coffee, cocoa, and grapes.
- While the agricultural sector plays a pivotal role in economic and social development, it has not garnered sufficient attention from policymakers and stakeholders in the MENA region. Despite its modest GDP contribution, agriculture holds strategic importance for sustainable development in MENA countries, which is expected to fuel the fertilizers market in the coming years.

The growing population and concern regarding food security need to be addressed through fertilizer use in the region, drive the

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market

- The fertilizer market in the region is being propelled by factors such as a growing population, the need to ensure food security, the adoption of intensive agricultural practices, and nutrient deficiencies in regional soils. It is projected to witness a value CAGR of 7.0% during 2023-2030.
- Africa, with its vast arable land, boasts the highest population on the continent. For instance, the Sub-Saharan African region is home to 13% of the global population and controls roughly 20% of the world's agricultural land. However, the region grapples with significant food insecurity, largely due to its increasing reliance on fertilizers.
- Nigeria leads the fertilizer market in Africa, commanding a share of 12.7% in 2022. With over 70 blending plants and major urea production facilities, the country is poised to become a fertilizer powerhouse, even competing globally in the urea market. This surge in production has led to cost reductions and increased availability, driving higher adoption rates among farmers.
- The Middle East, known for its unfavorable climatic conditions for farming, heavily relies on fertilizer imports to meet its domestic needs. Consequently, the region witnesses a comparatively higher adoption of fertilizers to cater to both domestic and international demands.
- While fertilizers offer economic benefits and can boost yields sustainably, their usage is on the rise due to challenges like limited availability and adverse environmental conditions. The region's imperative to address the needs of a growing population and ensure food security further fuels the market's growth.

Middle East & Africa Fertilizers Market Trends

Deterioration of both rain-fed and irrigated lands due to erosion caused by wind and water will pose a challenge in cultivating crops in the region.

- In the Middle East and Africa, field crops such as corn, rice, sorghum, and soybeans are typically planted between April and May and harvested from September to October. The agricultural sector in this region faces significant challenges. Land and water resources are scarce, and both rain-fed and irrigated lands are deteriorating due to erosion from wind and water, exacerbated by unsustainable farming practices. Field crops dominate the agricultural landscape, occupying around 90% of the total agricultural land in the region. In 2022, the cultivation area for field crops reached 249 million hectares, marking a 3.9% increase from 2017. Corn alone commands a significant share, covering 17.8% of the total field crop area. Wheat cultivation also saw a notable increase, with a 4.6% increase from 2017 to 2022. Specifically, the corn cultivation area in the region reached 44.3 million hectares in 2022.
- In Africa, Nigeria takes the lead as the top sorghum producer, closely followed by Ethiopia. Sorghum, a staple cereal crop, dominates the agricultural landscape in Nigeria, accounting for 50% of the total cereal output and occupying approximately 45% of the land dedicated to cereal production. Sorghum's resilience to drought and waterlogging, coupled with its adaptability to diverse soil conditions, makes it a preferred choice for food and income security in the drier regions of the Middle East and Africa.
- The region's population has surged by over 23% in the past decade. While food imports are projected to rise due to limited production capacity, the agricultural industry has shown consistent growth, paralleled by an expansion in cultivated land.

The arid climate leads to a faster depletion of nitrogen in the soil, making it a crucial nutrient for agricultural productivity.

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- Nitrogen, phosphorous, and potassium are primary nutrients crucial for plant growth. Nitrogen and phosphorous are integral to proteins and nucleic acids, key components of plant tissue. Meanwhile, potassium significantly influences the quality of harvested crops. Field crops, on average, receive an application rate of 174.4 kg per hectare for these primary nutrients.
- Specifically, the average application rates for nitrogen, phosphorous, and potassium in field crops across the Middle East & Africa stood at 234.8 kg/hectare, 127.4 kg/hectare, and 161.0 kg/hectare, respectively. The Middle East & Africa predominantly cultivate major field crops like wheat, sorghum, rice, and corn. In 2022, the average application rates for primary nutrients in these crops were 144.5 kg/hectare, 162.9 kg/hectare, 152.6 kg/hectare, and 245.24 kg/hectare, respectively.
- Of the primary nutrients, nitrogen dominates consumption in the Middle East & Africa, reaching 1.7 million metric tons in 2022. Nitrogen is the most crucial nutrient for crop yields, and given the prevalent deficiency of nitrogen in regional soils, it has become the most widely applied fertilizer. This dominance is driven by the region's substantial field crop area, comprising around 95.0% of the total, and the resulting high demand for primary nutrients. This emphasis on self-sufficiency and reducing import reliance underscores the growing market for field crops in the region.

Middle East & Africa Fertilizers Industry Overview

The Middle East & Africa Fertilizers Market is fragmented, with the top five companies occupying 7.92%. The major players in this market are Golden Fertilizer Company Limited, ICL Group Ltd, K+S Aktiengesellschaft, SABIC Agri-Nutrients Co. 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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