

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

Market Report | 2025-04-28 | 210 pages | Mordor Intelligence

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Report description:

The Middle East & Africa Specialty Fertilizer Market size is estimated at 4.93 billion USD in 2025, and is expected to reach 6.81 billion USD by 2030, growing at a CAGR of 6.65% during the forecast period (2025-2030).

Growing awareness and efficiency in nutrient supply may drive market growth

- The Middle East & Africa's specialty fertilizers market held a 7.6% share of the total market value in 2022, with a projected CAGR of 6.4% during the forecast period. The relatively lower adoption of specialty fertilizers by farmers, coupled with their higher costs compared to conventional options, explains this modest market share.
- In 2022, South Africa, Nigeria, and Turkey emerged as dominant players, capturing 11.4%, 8.3%, and 4.9% of the market, respectively. These countries, with their sizable populations, ample land availability, and government-led fertilizer trials, have become focal points for fertilizer manufacturers. These manufacturers are tailoring specialty products to meet the specific requirements of these markets, fueling further market expansion.
- Liquid fertilizers held a significant share of 48.5% in the Middle East & Africa's specialty fertilizers market in 2022. Growers in this region have recognized the benefits of liquid fertilizers, including their easy soil penetration, fast nutrient absorption by plants, and reduced wastage. These fertilizers can be applied either to the ground or as a foliar spray. This presents a lucrative opportunity for manufacturers eyeing the liquid fertilizers segment over the study period.
- In 2022, water-soluble fertilizers commanded a 47.3% share in the Middle East & Africa's specialty fertilizers market. These fertilizers offer a simplified nutrition management approach as their nutrient levels remain unaffected by leaching.
- A notable uptick in farmers' awareness regarding specialized fertilizers has occurred in recent years. This, coupled with a growing demand for liquid, water-soluble, and controlled-release fertilizers, is expected to be the driving force behind the market's

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growth.

Growing awareness and efficiency in nutrient supply may drive market growth during the study period

- The Middle East & Africa's specialty fertilizers market held a 7.6% share of the total market value in 2022, with a projected CAGR of 6.4% from 2023 to 2030. Specialty fertilizers face a lower market share, primarily due to limited farmer awareness and their relatively higher cost compared to conventional alternatives.
- In 2022, South Africa, Nigeria, and Turkey emerged as the dominant players in the market, capturing shares of 11.4%, 8.3%, and 4.9%, respectively. These countries, with their sizable populations, ample land availability, and government-backed fertilizer trials, have become prime targets for fertilizer manufacturers. These manufacturers are tailoring their offerings to the specific requirements of these nations, further fueling market growth.
- Liquid fertilizers held the lion's share, accounting for 48.5% of the Middle East & Africa's specialty fertilizers market in 2022. Growers in the region have recognized the advantages of liquid fertilizers, such as better soil penetration, enhanced nutrient absorption, and reduced wastage. These fertilizers can be applied either to the ground or as foliar sprays, presenting a significant growth opportunity for manufacturers in this segment.
- Water-soluble fertilizers, capturing 47.0% of the specialty fertilizers' market value in 2022, offer simplified nutrition management as they are not affected by leaching.
- The market has witnessed a surge in farmer awareness about specialized fertilizers and a rising demand for liquid, water-soluble, and controlled-release fertilizers, setting the stage for robust market growth.

Middle East & Africa Specialty Fertilizer Market Trends

Deterioration of agricultural lands due to erosion caused by wind and water will pose a challenge in cultivating crops in the region.

- In countries in the Middle East & Africa, field crops such as corn, rice, sorghum, and soybeans are typically sown in April-May and harvested between September and October. Agriculture in the region faces significant challenges, including scarcity of land and water. Both rain-fed and irrigated lands are deteriorating due to erosion from wind and water, exacerbated by unsustainable farming practices. Field crops occupy a dominant position, accounting for 90% of the region's agricultural land. In 2022, the total area under field crop cultivation in the region 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 area witnessed a 4.6% rise from 2017 to 2022. Specifically, the region's corn cultivation area was 44.3 million hectares in 2022.
- Nigeria leads in sorghum production, followed by Ethiopia in Africa. Sorghum, a vital cereal crop, constitutes 50% of Nigeria's total cereal output and occupies approximately 45% of the land dedicated to cereal production. Sorghum's resilience to drought and waterlogging, along with its adaptability to diverse soil conditions, makes it a preferred staple crop in the drier regions of the Middle East & Africa, ensuring food and income security.
- The region has witnessed a population growth of over 23% in the last decade. Despite limited production capacity, the forecast indicates a rise in food imports. However, the agricultural sector has consistently expanded, paralleled by an increase 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 Specialty Fertilizer Industry Overview

The Middle East & Africa Specialty Fertilizer Market is fragmented, with the top five companies occupying 16.78%. The major players in this market are ICL Group Ltd, K+S Aktiengesellschaft, Safsulphur, Unikeyterra Chemical 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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