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

Market Report | 2025-04-28 | 349 pages | Mordor Intelligence

AVAILABLE LICENSES:

- Single User License $4750.00
- Team License (1-7 Users) $5250.00
- Site License $6500.00
- Corporate License $8750.00

Report description:

The Nitrogenous Fertilizer Market size is estimated at 174.4 billion USD in 2025, and is expected to reach 232.3 billion USD by 2030, growing at a CAGR of 5.91% during the forecast period (2025-2030).

The growing need to increase the production is expected to bolster the growth of the market.

- Urea is the most important and most used nitrogenous fertilizer globally. In 2022, it accounted for a 48.6% share of the total consumption of nitrogenous fertilizers globally. The global urea market was valued at USD 75.0 billion in 2022, with a volume consumption of 140.2 million metric ton in the same year.
- Anhydrous ammonia has the highest nitrogen content (82%) among all nitrogenous fertilizers, where nitrogen is readily available in the form of NH3. The global market for anhydrous ammonia was valued at USD 24.5 million in 2022, with a volume consumption of 4.3 billion metric tons in the same year. However, the usage of anhydrous ammonia as a fertilizer is restricted to the countries in North America and is commonly used in the region's corn belts since it is a highly nitrogen-consuming crop.
- The ammonium nitrate market accounted for 6.3% and 8.5%, by value and volume, respectively, of the total nitrogenous fertilizers in 2022 and it is anticipated to grow over the forecasted period 2023-2030 at 4.9% CAGR in terms of value. Ammonium Nitrate is more inexpensive than many other nitrogen fertilizers and suitable for all seasons, making it a preferred choice for growers.
- Moreover, Asia-Pacific was the largest market for nitrogenous fertilizers in 2022. It accounted for a market value share of 34.6%. In the Asia-Pacific region, China and India are the two largest consumers owing to their increasing population and large areas under cultivation.
- The global nitrogenous fertilizer market value is anticipated to grow during the forecast period at 5.6% CAGR as it is the most

demanded nutrient.

Nitrogen deficiency in major crops and reducing nitrogen use efficiency may drive the nitrogenous fertilizers market

- In 2022, the global nitrogenous fertilizer market reached a value of USD 184.7 billion, with a consumption volume of 288.8 million metric tons. This surge in nitrogen fertilizer adoption is primarily driven by the reduced efficiency of crops in utilizing nitrogen from the soil.
- Asia-Pacific dominates the nitrogenous fertilizer market, commanding a 39.0% share in 2022. Notably, China and India, both agricultural powerhouses, benefit from ample arable land, a rising food demand due to increasing population, and significant government support. These factors are poised to propel nitrogenous fertilizer consumption in the region further.
- North America accounted for market volume shares of 23.2%. In North America, the United States dominates the market, boasting the majority share due to its extensive arable land, with field crops occupying 69% of the cropland, necessitating higher nitrogen inputs.
- Followed by North America, Europe, the third-largest market, held a 16.7% volume share in 2022. The region grapples with challenges like droughts and heatwaves, which hamper nitrogen availability in the soil, leading to crop losses. Consequently, farmers in Europe increasingly turn to nitrogenous fertilizers, indicating a potential market upswing.
- Nitrogenous fertilizers hold paramount importance in agricultural production. Despite shrinking cultivated areas, the global market for these fertilizers is projected to witness growth, driven by intensified cultivation practices and increased fertilizer application, all aimed at bolstering yields and productivity in the agricultural sector.

Global Nitrogenous Fertilizer Market Trends

The rising pressure on the agricultural sector to increase food production is expected to drive area under field crop cultivation

- The global agricultural sector is currently facing many challenges. According to the UN, the world population will likely exceed nine billion by 2050. This population growth may overburden the agricultural sector, 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 need 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 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 42.5% of the total crop area in 2022.
- North America is the second-largest arable region in terms of total agricultural land area in the world. Diverse varieties of crops are grown on North American farms, primarily field crops. According to the USDA, corn, cotton, rice, soybean, and wheat are among the region's dominant field crops. The United States dominated the market by accounting for 155.09 million hectares of the total area under crop cultivation in the region during the study period, with field crops covering the majority of the area, accounting for a share of 65.7% in 2022. Crop acreage in the country fell significantly between 2017 and 2019, primarily due to unfavorable environmental conditions that resulted in heavy floods in areas such as Texas and Houston.

Nitrogen is the most widely used primary nutrient fertilizer in field crops, accounting for 45.57% of the total consumption

- In 2023, the average primary nutrient application rate for field crops stood at 164.3 kg per hectare. Notably, corn, rice, wheat, sorghum, soybean, rapeseed, and cotton represented the primary field crops cultivated, and these crops need 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 of nitrogen reached a substantial 224.6 kg per hectare. The soils experience nitrogen deficiency due to their high pH levels, sandy soil composition, and persistent dry conditions resulting from recurrent droughts and heat waves. These factors collectively drive an increased demand for nitrogen nutrients in agricultural practices.
- Rapeseed emerged as a significant consumer of nitrogen nutrients, with an average nutrient application rate of 347.4 kg per hectare. This substantial nitrogen demand in rapeseed cultivation is primarily linked to the reduced nitrogen use efficiency (NUE) by these crops. China, Canada, India, Australia, and European countries are major producers of rapeseed crops. Changing climatic conditions like recent droughts and heavy flooding conditions lead to N loss from soils, which affects crop growth and yield formation of rapeseed. It is necessary to control the nitrogen application rate to keep it within the limits. Appropriate levels of nitrogen can boost the photosynthetic capacity, metabolic levels, and morphogenesis and increase yield.

Nitrogenous Fertilizer Industry Overview

The Nitrogenous Fertilizer Market is fragmented, with the top five companies occupying 19.67%. The major players in this market are CF Industries Holdings, Inc., EuroChem Group, Nutrien Ltd., 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

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 Primary Nutrients
4.2.1.1 Field Crops

4.2.1.2 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 Product
5.1.1 Ammonium Nitrate
5.1.2 Anhydrous Ammonia
5.1.3 Urea
5.1.4 Others
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
5.5 Region
5.5.1 Asia-Pacific
5.5.1.1 Australia
5.5.1.2 Bangladesh
5.5.1.3 China
5.5.1.4 India
5.5.1.5 Indonesia
5.5.1.6 Japan
5.5.1.7 Pakistan
5.5.1.8 Philippines
5.5.1.9 Thailand
5.5.1.10 Vietnam
5.5.1.11 Rest of Asia-Pacific
5.5.2 Europe
5.5.2.1 France
5.5.2.2 Germany
5.5.2.3 Italy
5.5.2.4 Netherlands
5.5.2.5 Russia
5.5.2.6 Spain

5.5.2.7 Ukraine
5.5.2.8 United Kingdom
5.5.2.9 Rest of Europe
5.5.3 Middle East & Africa
5.5.3.1 Nigeria
5.5.3.2 Saudi Arabia
5.5.3.3 South Africa
5.5.3.4 Turkey
5.5.3.5 Rest of Middle East & Africa
5.5.4 North America
5.5.4.1 Canada
5.5.4.2 Mexico
5.5.4.3 United States
5.5.4.4 Rest of North America
5.5.5 South America
5.5.5.1 Argentina
5.5.5.2 Brazil
5.5.5.3 Rest of South America

6 COMPETITIVE LANDSCAPE
6.1 Key Strategic Moves
6.2 Market Share Analysis
6.3 Company Landscape
6.4 Company Profiles
6.4.1 CF Industries Holdings, Inc.
6.4.2 Coromandel International Ltd.
6.4.3 EuroChem Group
6.4.4 Grupa Azoty S.A. (Compo Expert)
6.4.5 Indian Farmers Fertiliser Cooperative Limited
6.4.6 Koch Industries Inc.
6.4.7 Nutrien Ltd.
6.4.8 SABIC Agri-Nutrients Co.
6.4.9 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

SCOTTS INTERNATIONAL

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

Market Report | 2025-04-28 | 349 pages | Mordor Intelligence

To place an Order with Scotts International:

- - Print this form
- - Complete the relevant blank fields and sign
- - Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	$4750.00
	Team License (1-7 Users)	$5250.00
	Site License	$6500.00
	Corporate License	$8750.00
	VAT	
	Total	

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*		Phone*	
First Name*		Last Name*	
Job title*			
Company Name*		EU Vat / Tax ID / NIP number*	
Address*		City*	
Zip Code*		Country*	
		Date	2025-06-23
		Signature