

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

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Report description:

The North America Fertilizers Market size is estimated at 63.76 billion USD in 2025, and is expected to reach 81.87 billion USD by 2030, growing at a CAGR of 5.13% during the forecast period (2025-2030).

The rising need of fertilizers to increase production and improve yield is anticipated to fuel the growth of the market

- Field crops dominate in fertilizer usage in North America, with a market value of USD 67.2 billion in the year 2022. This is due to the region's large-scale cultivation of field crops, which occupy over 95.0% of the total agricultural land. The United States accounts for 69.0% of the available arable land in the region, with 84.0% of it being used for field crop cultivation.
- Turf and ornamental crops are the second-largest market for fertilizers, valued at USD 5.3 billion in the year 2022. Ornamental plants are becoming increasingly popular among homeowners as disposable income and living standards rise, which is expected to fuel the growth of the market as fertilization is essential to maintain the health and appearance of these plants.
- Horticultural crops, accounting for just 7.3% of the total agricultural land, represented roughly 5.3% of the total fertilizer market value in 2022. Despite a 2.5% decrease in horticulture cultivation area between 2018 and 2021, the demand for fruits and vegetables in the region is expected to drive the market at a CAGR of 6.1% during 2023-2030. The decreased acreage directly influences the use of more fertilizers to increase production and meet demand.
- Furthermore, factors such as the increase in fertilizer usage for the improving yield and quality of the crops coupled with reducing arable land and the need to increase production to meet the growing demand are driving the growth of the market. Therefore, the North American fertilizers market value is expected to record a 4.9% CAGR during 2023-2030.

Higher cultivation areas under cereal crops in the United States propel the market growth

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- In North America, the United States and Mexico constitute more than 80.0% of the fertilizers market value and volume. Even though North America has phosphate and potash resources, the region is a net importer of more than half nitrogenous and over 85.0% potash from international sources.
- The United States and Mexico are the largest consumers of fertilizers in the region, which is majorly due to the higher cultivation areas holding 66.8% and 18.7% of the total crop acreage of North America. Additional scientific and technical advancements in fertilizers in recent years have helped farmers maximize fertilizer benefits.
- The United States is the largest market in the region, accounting for about 49.3% of the total fertilizers market value in 2022. The dominance of the United States is mainly due to the higher cultivation areas under cereal crops and various nutrient deficiencies that are addressed by fertilization.
- Generally, in North America, agriculture has been mechanized with the latest technology, particularly in the United States and Canada. These technological improvements demand more efficient and sustainable fertilizers in the region.
- The supply chain disruptions in 2019-2020 declined the fertilizer value and volume in the region. However, between 2020 and 2021, the demand recovery for fertilizers and increased input costs resulted in a spike in the fertilizer value.
- In the North American region, the United States and Mexico are the biggest and most advanced economies. Most of the multinational companies are situated in the region, giving growers and farmers an advantage in terms of fertilizer product availability.

North America Fertilizers Market Trends

The financial support by the government, such as subsidies, has contributed to the expansion of field crops

- A wide array of crops are grown on North American farms, mainly covering field crops. Corn, cotton, rice, soybean, and wheat are some of the dominating field crops across the region. The United States, Canada, and Mexico are major contributors to the region's agricultural output. In 2022, field crops covered around 97.6% of the overall cultivation in North America, with cereals and oilseeds dominating the market.
- The United States dominates the market, with 135.7 million hectares of the overall area under crop cultivation during the study period. Field crops and horticulture cover the majority of the area, and they accounted for shares of 97.2% and 2.8%, respectively, in 2022. However, during 2018-2019, the country witnessed a significant dip in crop acreages, mainly due to unfavorable environmental conditions that resulted in heavy floods in areas like Texas and Houston.
- The most cultivated crop is corn, the majority of which is grown in a region known as the 'Corn Belt' traditional area in the midwestern United States, roughly covering western Indiana, Illinois, Iowa, Missouri, eastern Nebraska, and eastern Kansas, in which corn (maize) and soybeans are the dominant crops. It is the major rice exporter, and rice cultivation in the region is mainly concentrated in 4 regions, with three in the South and one in California. Therefore, the increased market potential for the region's field crop, coupled with the increased government funding and protection, is anticipated to positively drive the area under field crop cultivation in the region.

Among all the primary nutrients, nitrogen is applied in a higher quantity to field crops, which is equivalent to 229.8 kg/hectare

- Field crops, including rice, corn/maize, wheat, and rapeseed/canola, rank high in nutrient consumption in the region. In 2022,

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rice led the pack, consuming around 140.85 kg/hectare of primary nutrients, closely followed by rapeseed/canola at 118.40 kg/hectare. Cereals, being extensively cultivated, exhibit a higher appetite for nitrogen-based fertilizers. This intensive cultivation depletes soil nutrients, necessitating increased fertilizer application for optimal growth.

- Nitrogen dominates the primary nutrient usage, accounting for approximately 74.0% in 2022, translating to 229.8 kg/hectare for field crops. Despite this, nitrogen deficiency remains a significant concern in the region. Consequently, nitrogen supplements are predominantly provided through soil application. Once in the soil, nitrogen converts into mineral nitrate, facilitating easy absorption by plants. Notably, rapeseed, a key nitrogen consumer, enjoys widespread cultivation in the United States.
- Rapeseed finds industrial applications, notably in the production of oils for lubricants, hydraulic fluids, and plastics. While fertilizer usage hinges on soil quality and rainfall patterns, rapeseed's nitrogen requirements typically range from 100 to 150 lbs./acre. Phosphorus and potassium fertility rates exhibit soil-dependent variations, yet the recommended rates, as per AgMRC, span from 0 to 80 lbs./acre and 0 to 140 lbs./acre, respectively.
- Given the pivotal role of primary nutrients in crop nutrition, their application rates are poised for a significant uptick in the coming years, driven by concerns like soil depletion and leaching.

North America Fertilizers Industry Overview

The North America Fertilizers Market is fragmented, with the top five companies occupying 35.62%. The major players in this market are CF Industries Holdings, Inc., Nutrien Ltd., The Andersons Inc., The Mosaic Company 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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