

## **North America Specialty Fertilizer - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

Market Report | 2025-04-28 | 218 pages | Mordor Intelligence

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### **Report description:**

The North America Specialty Fertilizer Market size is estimated at 10.85 billion USD in 2025, and is expected to reach 14.39 billion USD by 2030, growing at a CAGR of 5.81% during the forecast period (2025-2030).

The market is dominated by water-soluble fertilizers due to the wide range of nutrient grades and different application methods

- In 2022, water-soluble fertilizers held the maximum share of the North American specialty fertilizers market, accounting for 47.9%. The demand for these fertilizers is influenced by nutrient grades and application modes, such as foliar or fertigation, based on specific needs. Notably, in 2022, foliar application accounted for 45.2% of the market, while fertigation claimed 54.8%.
- Liquid fertilizers secured the second-largest market share at 45.9% in 2022. Given the acidic nature of arable lands in the region, there's a growing preference for liquid-based specialty fertilizers like ammonium nitrate. These fertilizers not only help maintain soil pH levels but also address concerns about nitrogen leaching, a key issue for both environmentalists and farmers.
- Controlled-release fertilizers, with a modest 4.9% market share, play a pivotal role in precision farming. By ensuring crops receive precise nutrient dosages, they have become indispensable in modern agriculture.
- In 2022, the US accounted for a significant chunk, 67.1%, of the North American specialty fertilizer market. Water-soluble and liquid fertilizers were the dominant segments in the US market. Likewise, the study period revealed a strong preference for foliar and fertigation modes in the US, a trend attributed to the country's well-established irrigation infrastructure.
- With a well-developed irrigation system and growing demand for field crops, turfs, and ornamentals, the specialty fertilizer market in the US is poised for growth in the coming years.

The United States dominates the market due to well-developed agricultural systems and larger cultivation area across the country

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- In 2022, the United States held a dominant position in the North American specialty fertilizers market. Water-soluble fertilizers, liquid fertilizers, and CRF accounted for 48.0%, 46.3%, and 5.1% of the market share, respectively. Slow-release fertilizers had a smaller share of 0.6%, primarily due to limited adoption in major crops like wheat, maize, and cereals. However, the segment's growth is expected to be bolstered by the country's developing micro-irrigation system. In 2022, the total irrigated cropland in the US spanned 18.3 million hectares.
- In North America, Canada has the second-largest specialty fertilizer market, followed by the United States. During 2023-2030, the country's specialty fertilizer market is anticipated to register a CAGR of 6.4%.
- Mexico held a 16.0% share of the North American specialty fertilizers market in 2022. Notably, Mexico's field crops saw a volume of 2.2 million metric tons in 2022, with an expected rise to 2.8 million metric tons by 2030.
- Specialty fertilizers experienced a notable decline in both value and volume in 2019 and 2020, primarily due to disruptions in the supply chain caused by the COVID-19 pandemic. However, the market rebounded in 2021, driven by rising raw material prices and increased demand.
- The growing adoption of precision technologies is expected to drive the demand for specialty fertilizers. Precision farming, which emphasizes optimal fertilizer application, aligns well with the characteristics of specialty fertilizers like controlled-release and slow-release variants. As a result, the North American specialty fertilizers market is projected to register a CAGR of 5.6% during 2023-2030.

#### North America Specialty Fertilizer Market Trends

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.
- By country, the United States dominates the market, covering 135.7 million hectares of the overall area under crop cultivation during the study period. Field crops and horticulture covered the majority of the area and accounted for shares of 97.2% and 2.8% in 2022. However, between 2018 and 2019, the country witnessed a significant dip in crop acreages majorly due to unfavorable environmental conditions resulting in heavy floods in areas like Texas and Houston.
- The largest crop cultivated is corn, the majority of which is grown in a region known as the 'Corn Belt,' It is a 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. Also, it is the major rice exporter, and rice cultivation in the region is mainly concentrated within four regions, with three in the South and one in California. The increased market potential for the region's field crops, coupled with 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, such as rice, corn/maize, wheat, and rapeseed/canola, are some of the major primary nutrient-consuming crops in

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the region. In 2022, about 140.85 kg/hectare of primary nutrients were consumed by rice, followed by 118.40 kg/hectare consumed by rapeseed/canola. Cereals are anticipated to consume the maximum amount of nitrogen-based fertilizers. As they are grown intensively in the region, they deplete the nutrients in the soil and require more fertilizers to supplement growth.

- Among all the primary nutrients, nitrogen is applied in a higher quantity, accounting for about 74.0% in 2022, equivalent to 229.8 kg/hectare for field crops. Nitrogen deficiency, however, is one of the most prevalent crop nutrient problems in the region. Hence, most of the nitrogen supplement is provided through soil application. When applied to the soil, nitrogen is converted to mineral nitrate for the plants to absorb easily. Rapeseed, the major nitrogen-consuming crop, is widely grown in the United States.
- Rapeseed is used for extracting oil for industrial applications, like lubricants, hydraulic fluids, and plastics. While fertilizer usage is based on soil quality and rainfall potential, its nitrogen requirements range from 100 to 150 lbs./acre. Phosphorus and potassium fertility rates also vary from soil to soil. However, the recommended rates range from 0 to 80 lbs./acre and 0 to 140 lbs./acre, as per the AgMRC.
- Since primary nutrients are the major sources of nutrients for various crops, their application rates are anticipated to grow significantly over the years due to soil depletion, leaching, etc.

## North America Specialty Fertilizer Industry Overview

The North America Specialty Fertilizer Market is moderately consolidated, with the top five companies occupying 63.41%. The major players in this market are CF Industries Holdings, Inc., ICL Group 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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