

## **Russia Fertilizers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Russia Fertilizers Market size is estimated at 11.85 billion USD in 2025, and is expected to reach 16.41 billion USD by 2030, growing at a CAGR of 6.74% during the forecast period (2025-2030).

Field crops dominate the market due to their high consumption rates and large cultivation areas

- In 2022, field crops dominated the agricultural sector in Russia, accounting for 95.0% of its value share. These crops are expected to witness a robust growth of 40.1% during the study period. Agricultural lands, covering 13.0% of Russia's territory, primarily focus on cultivating key crops like wheat, sugar beet, and various cereals (including maize, barley, oats, and rye). Wheat, in particular, takes the lead as the most extensively cultivated field crop, with a total area of 27.9 million hectares in 2021, marking a 5.5% increase from 2018. Given its status as a major consumer of NPK fertilizers, the expansion of wheat cultivation is poised to drive fertilizer consumption in the country.
- During 2023-2030, the horticulture crop acreage in Russia is projected to witness an 11.8% growth. This surge is attributed to the rising demand for both domestic consumption and exports, which, in turn, is fueling the fertilizer market. The push for improved crop quality and yield is also prompting private investors and governments to show heightened interest in greenhouse cultivation. This focus on greenhouse horticulture, aimed at maximizing crop quality and yield, is driving up the demand for specialty fertilizers. These fertilizers are designed to provide crops with precise nutrients at the right time, optimizing their growth and yield.
- As disposable incomes and living standards rise, there is a notable increase in the popularity of ornamental plants among homeowners. This trend is expected to significantly boost fertilizer demand, with a projected CAGR of 7.2% from 2023 to 2030.

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## Russia Fertilizers Market Trends

Russia is focusing on increasing field crop production to meet the domestic demand and ensure food security

- Field crops dominate Russia's agricultural landscape, covering 96.5% of its cultivated land. Among these, wheat, corn, soybean, and rye take center stage. Notably, in 2022, Russia witnessed a 7% expansion in its total cultivated area.
- Wheat holds a prominent position in Russia's agricultural sector, occupying 45.4% of the field crop area. Key wheat-growing regions span the North Caucasus, Black Earth, Volga, Ural, and West Siberia. The country observes two wheat-growing seasons: winter and spring. Projections for the marketing year 2022/23 indicate a record-breaking wheat production of 92.0 million metric tons (MMT), marking a 22% surge from the previous year and an 18% leap from the 5-year average. This estimate comprises 68.0 MMT of winter wheat and 24.0 MMT of spring wheat. Furthermore, the projected wheat yield stands at a record 3.17 tons per hectare (t/ha), reflecting a 17% increase from the prior year and a 12% rise from the 5-year average.
- For the marketing year 2022/23, corn production in Russia is anticipated to reach 15.8 million metric tons, marking a 13% increase from the previous month and a 4% rise from the prior year. The projected corn yield stands at a record 6.00 tons per hectare (t/ha), showcasing a 7% increase from the previous month and a 14% surge from the prior year. Russia boasts vast untapped agricultural land, and concerted efforts are underway to cultivate more of it. This push to expand arable land not only amplifies the acreage dedicated to field crops but also underscores the Russian government's commitment to bolstering agricultural production. Through measures like subsidies, grants, and favorable lending conditions, the government incentivizes farmers to expand their crop cultivation.

Nitrogen is a prominent nutrient required for field crops, which is mostly consumed by rapeseed crops in the country

- Nitrogen, phosphorous, and potassium are the primary nutrients crucial for plant growth. Nitrogen and phosphorous are integral to proteins and nucleic acids, key components of plant tissues. Potassium plays a pivotal role in enhancing the quality of harvested plant products. In 2022, the average application of primary nutrients in field crops stood at 169.6 kg/hectare. Notably, Russia's major field crops encompass wheat, rapeseed, rye, soybean, and corn. The average application rates for nitrogen, phosphorous, and potassium in these crops were 227.7 kg/hectare, 125.5 kg/hectare, and 155.6 kg/hectare, respectively.
- Out of the primary nutrients, nitrogen takes the lead, with an average application rate of 227.7 kg/hectare in field crops. Nitrogenous fertilizers, when used judiciously, bolster grain quality, expedite shoot growth, and promote robust flower bud formation. Early-stage nitrogen fertilization stimulates tillering and boosts crop yields. Moreover, applying nitrogen during panicle initiation or early booting stages leads to higher grain production and weight per panicle. Rapeseed, known for its oil and protein content, exhibits a pronounced appetite for nitrogen, surpassing other field crops. In Russia, rapeseed is predominantly cultivated for vegetable oil production.
- In 2022, Russia's nutrient consumption was dominated by primary nutrients, accounting for a staggering 91.5% share, translating to a volume consumption of 7.0 million metric tons. This high consumption is attributed to the vast expanse of field crops, covering approximately 90% of the agricultural land, and their substantial nutrient demands. Consequently, the country's focus on bolstering self-sufficiency and reducing import reliance in the field crop sector may fuel the growth of the market.

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## Russia Fertilizers Industry Overview

The Russia Fertilizers Market is fragmented, with the top five companies occupying 34.94%. The major players in this market are EuroChem Group, KuibyshevAzot PJSC, MINUDOBRENIYA JSC, PhosAgro Group of Companies 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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