

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

Market Report | 2025-04-28 | 345 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 Water Soluble Fertilizer Market size is estimated at 20.72 billion USD in 2025, and is expected to reach 28.2 billion USD by 2030, growing at a CAGR of 6.35% during the forecast period (2025-2030).

The expansion of cultivation areas is driving the demand for water-soluble fertilizers, improving productivity

- Field crop cultivation dominates globally, accounting for about 78.8% of the total water-soluble fertilizer consumption. The cultivation of these crops led to a consumption of 29.1 million metric tons of water-soluble fertilizers, valued at USD 18.19 billion. The large consumption of water-soluble fertilizers by field crops was due to the large area under the cultivation of these crops. More than 90.0% of the global agricultural land is dedicated to the cultivation of field crops.
- Generally, there is more demand for water-soluble fertilizers in horticultural crops, as they are well-equipped for irrigation like sprinkler or micro irrigation systems. Water-soluble fertilizers can be applied using the foliar or fertigation method. Horticultural crops are the second-largest crop types that consume water-soluble fertilizers, and they accounted for about 18.8% of the global water-soluble fertilizer market volume in 2022. Foliar water-soluble fertilizers play an important role in fruit crops, as foliar spraying is known to improve the quality of the fruits.
- Turf & ornamental crops account for about 3.5% of the global water-soluble fertilizer market volume and consume 984.0 thousand million metric tons. The growing demand for these crops in various applications and the adoption of environmentally friendly fertilizers are increasing the market for water-soluble fertilizers in these crops. The market is expected to register a CAGR of 5.4% due to the increasing area under cultivation of turf & ornamental crops. This is due to the increasing concern over pollution and the growing importance of aesthetic landscaping gardens and ecotourism globally.
- Therefore, the global consumption of water-soluble fertilizers in respective crop types is anticipated to grow during 2023-2030.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

The market is witnessing growth as farmers prioritize maximizing crop yields

- The Asia-Pacific water-soluble fertilizer market accounted for 43.9% of the market share and witnessed stable growth during the study period, with an overall value in the region amounting to USD 10.1 billion in 2022. Field crops occupied the largest share of 81.6%, followed by horticultural crops.
- Over the past few years, the soluble fertilizer industry in China has experienced significant growth and development due to its numerous benefits. This industry has proven to be an effective solution for reducing fertilizer usage, water, labor, and cost while simultaneously increasing crop yield and quality. This growth has been facilitated by the government's favorable policies toward modern agriculture development and substantial investment in the industry.
- The market for specialty fertilizers in North America is largely dominated by water-soluble fertilizers, which held a market share of 52.8% in 2022. The demand for these fertilizers is influenced by the variety of nutrient grades available, as well as the different application modes such as foliar or fertigation, depending on the specific application requirements. Based on the analysis, the fertigation mode accounted for 54.7% of the market share in 2022, while the foliar application mode accounted for 45.3%.
- In recent years, there has been a considerable surge in the demand for specialized fertilizers, such as water-soluble fertilizers, among farmers worldwide. The primary reason behind this trend is that farmers are increasingly looking to maximize their crop yield per hectare. These fertilizers are known to provide the required nutrients to the crops in a readily available form, promoting better plant growth and yield. As a result, the market is expected to continue to grow during 2023-2030.

Global Water Soluble Fertilizer Market Trends

The rising pressure on the agriculture industry to meet the growing food demand is expected to increase the area under field crop cultivation

- The global agricultural sector is currently facing many challenges. According to the United Nations, the world population may exceed 9 billion by 2050. This population growth could overburden the agricultural industry, 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 now need to utilize 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 24.3% of the total crop area in 2022.
- North America ranks as the second-largest arable region globally. Its farms cultivate a diverse range of crops, with a focus on field crops. Notably, corn, cotton, rice, soybean, and wheat are the prominent field crops, as highlighted by the USDA. In 2022, the United States accounted for 46.2% of North America's crop cultivation area. However, the country witnessed a significant drop in crop acreage between 2017 and 2019, primarily due to adverse environmental conditions, leading to severe flooding in regions like Texas and Houston.

The global average application rate of primary nutrient nitrogen, potassium, and phosphorus in field crops is 164.31 kg/ha

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- Corn, rapeseed, cotton, sorghum, rice, wheat, and soybean are among the primary nutrient-intensive crops globally. The average application rates for primary nutrients in these crops were 230.57 kg/ha, 255.75 kg/ha, 172.70 kg/ha, 158.46 kg/ha, 154.49 kg/ha, 135.35 kg/ha, and 120.97 kg/ha, respectively. Primary nutrient fertilizers are vital for crops as they facilitate crucial plant metabolic processes and contribute to the formation of key tissues, including cells, cell membranes, and chlorophyll. Phosphorus is pivotal for cultivating high-quality crops, while potassium activates enzymes crucial for plant growth.
- The global average application rate for nitrogen, potassium, and phosphorus in field crops stands at 164.31 kg/ha. Nitrogen leads the pack as the most widely used primary nutrient fertilizer, with an application rate of 224.6 kg/ha, followed by potassic fertilizers at 150.3 kg/ha. Phosphorus ranks third, with an application rate of 117.9 kg/ha in 2022.
- In 2022, rapeseed recorded the highest nitrogen application rate at 347.4 kg/ha, while corn topped the phosphorus application rate at 156.3 kg/ha. Canola took the lead for potassium application, with a rate of 248.6 kg/ha.
- The global cultivation area for field crops is on the rise, notably in South America and the Asia-Pacific region, making them potential growth markets for fertilizers. Developed regions like Europe and North America, along with areas grappling with nutrient deficiencies, are increasingly turning to specialty fertilizers for their efficacy. These factors are poised to propel the primary nutrient fertilizers market in the coming years.

Water Soluble Fertilizer Industry Overview

The Water Soluble Fertilizer Market is fragmented, with the top five companies occupying 27.25%. The major players in this market are ICL Group Ltd, Indian Farmers Fertiliser Cooperative Limited, K+S Aktiengesellschaft, Sociedad Quimica y Minera de Chile SA 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 Micronutrients

4.2.1.1 Field Crops

4.2.1.2 Horticultural Crops

4.2.2 Primary Nutrients

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 4.2.2.1 Field Crops
- 4.2.2.2 Horticultural Crops
- 4.2.3 Secondary Macronutrients
 - 4.2.3.1 Field Crops
 - 4.2.3.2 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 Type
 - 5.1.1 Complex
 - 5.1.2 Straight
 - 5.1.2.1 By Nutrient
 - 5.1.2.1.1 Micronutrients
 - 5.1.2.1.2 Nitrogenous
 - 5.1.2.1.3 Phosphatic
 - 5.1.2.1.4 Potassic
 - 5.1.2.1.5 Secondary Macronutrients
- 5.2 Application Mode
 - 5.2.1 Fertigation
 - 5.2.2 Foliar
- 5.3 Crop Type
 - 5.3.1 Field Crops
 - 5.3.2 Horticultural Crops
 - 5.3.3 Turf & Ornamental
- 5.4 Region
 - 5.4.1 Asia-Pacific
 - 5.4.1.1 Australia
 - 5.4.1.2 Bangladesh
 - 5.4.1.3 China
 - 5.4.1.4 India
 - 5.4.1.5 Indonesia
 - 5.4.1.6 Japan
 - 5.4.1.7 Pakistan
 - 5.4.1.8 Philippines
 - 5.4.1.9 Thailand
 - 5.4.1.10 Vietnam
 - 5.4.1.11 Rest of Asia-Pacific
 - 5.4.2 Europe
 - 5.4.2.1 France
 - 5.4.2.2 Germany
 - 5.4.2.3 Italy
 - 5.4.2.4 Netherlands
 - 5.4.2.5 Russia
 - 5.4.2.6 Spain

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 5.4.2.7 Ukraine
- 5.4.2.8 United Kingdom
- 5.4.2.9 Rest of Europe
- 5.4.3 Middle East & Africa
 - 5.4.3.1 Nigeria
 - 5.4.3.2 Saudi Arabia
 - 5.4.3.3 South Africa
 - 5.4.3.4 Turkey
 - 5.4.3.5 Rest of Middle East & Africa
- 5.4.4 North America
 - 5.4.4.1 Canada
 - 5.4.4.2 Mexico
 - 5.4.4.3 United States
 - 5.4.4.4 Rest of North America
- 5.4.5 South America
 - 5.4.5.1 Argentina
 - 5.4.5.2 Brazil
 - 5.4.5.3 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 BMS Micro-Nutrients NV
 - 6.4.2 Coromandel International Ltd.
 - 6.4.3 Grupa Azoty S.A. (Compo Expert)
 - 6.4.4 Haifa Group
 - 6.4.5 ICL Group Ltd
 - 6.4.6 Indian Farmers Fertiliser Cooperative Limited
 - 6.4.7 K+S Aktiengesellschaft
 - 6.4.8 Sociedad Quimica y Minera de Chile SA
 - 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. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

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

Market Report | 2025-04-28 | 345 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*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>
		Date	<input type="text" value="2026-03-02"/>
		Signature	

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

