

Vietnam Organic Fertilizer Market Size Analysis Report - Market Share, Forecast Trends and Outlook (2025-2034)

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Report description:

The Vietnam organic fertilizer market was valued at USD 76.21 Million in 2024. The industry is expected to grow at a CAGR of 7.60% during the forecast period of 2025-2034 to attain a valuation of USD 158.54 Million by 2034.

Vietnam Organic Fertilizer Market Growth

The growth of the Vietnam organic fertilizer market is driven by its increased preference among farmers, especially due to the numerous financial benefits they offer when compared to synthetic fertilizers. For instance, organic fertilizers can be produced using waste generated from agricultural fields, eliminating the input cost of crop production. Additionally, key industry players are offering readymade organic fertilizers at subsidised rates to promote their use in the agriculture sector. For instance, Sustainable Management Services, the agronomy division of ECOM's subsidiary, one of the largest exporters of coffee in Vietnam, is selling organic fertilizers for the crop at a 20% subsidy to farmers.

Moreover, the crops produced using organic fertilizers receive organic certification from the government, which enhances their brand value and reputation in the Vietnam organic fertilizer market, thereby leading to increased sales among consumers in domestic and international markets. According to a government decree currently in execution, 100% organic products that have at least 95% organic ingredients certified by Vietnam Organic Products standards (TVCN) can bear the logo of Vietnam Organic Products. Such certifications have enhanced the revenue growth of the organic fertilizer market in Vietnam.

Key Trends and Recent Developments

Growing agricultural production, rising food crop exports, and favourable government initiatives are accelerating the Vietnam organic fertilizer market value.

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June 2024

Can Tho City Department of Agriculture and Rural Development (DARD) in Vietnam, organised a ceremony for the circular agricultural economic model, in collaboration with the International Rice Research Institute. The model aimed to turn agricultural by-products such as rice straw into organic fertilizers. As part of the ceremony, IRRI signed and handed over a self-propelled organic fertilizer mixer to the Tien Thuan Agricultural and Service Cooperative, besides providing training to the cooperative members on the method of developing organic fertilizer from rice straw.

May 2024

Mekong Capital's fifth fund, Mekong Enterprise Fund IV (MEF IV), signed an agreement with the Cambodia-based biofertilizer company HUSK. HUSK is known for producing biochar, carbon-based fertilizers to replace synthetic fertilizers and address crucial challenges against crop yield such as yield gap, pests, diseases, poor and nutrient-deficient soil, as well as the adverse impacts of climate change.

April 2024

The Ministry of Agriculture and Rural Development, Vietnam collaborated with the US Department of Agriculture (USDA) on the Fertiliser Right Project, currently being implemented by the International Rice Research Institute (IRRI) in the country. The project will span four years and was allocated an initial budget worth VND 4.4 million. It aimed at leveraging the advantages of existing organic materials to produce organic fertilizers that contribute to the reduction of environmental pollution, and greenhouse gas emissions.

January 2021

A group of students from Van Lang University, Vietnam, developed a method of converting banana tree trunks, leaves, and barks into organic fertilizers and manure worth VND 2,500 per kilogram. The process involved hand-picking banana pseudo stems and leaf sheaths, battering, and drying them to cut into pieces, mixing and layering them with organic waste and allowing them to decompose for over a month.

Growing Agriculture Sector Propelling the Growth of Vietnam Organic Fertilizer Market

Agriculture contributed up to 7.51% to the increase in the total value added to the Vietnamese economy during the fourth quarter of 2023. Additionally, agricultural production has been rising due to increasing food consumption and demand in the country. According to the National Statistics Office, Vietnamese farmers planted 2,953.6 thousand hectares of winter-spring crop as of May 2024, an increase of 0.9 thousand hectares compared to the previous year's cultivation during the same period. The production is expected to increase further in the second half of the year and thereafter throughout the forecast period, owing to the rising population.

Rising Food Crop Exports Leading to an Increase in Vietnam Organic Fertilizer Market Revenue

Vietnam is the largest exporter of black pepper and the second largest exporter of rice in the world, raising the overall production levels of these crops in the country. Their increased production, coupled with stringent quality checks in major export markets, has compelled the farmers to reduce the use of synthetic fertilizers during their cultivation and opt for more sustainable alternatives such as organic fertilizers and manure. In 2022, the country is reported to have exported nearly 2 million kgs of rice in husk and nearly 5 million kgs of broken rice globally. Additionally, the global exports of black pepper reached nearly 42 million kgs in 2021. The values are projected to rise further during the coming years owing to Vietnam's proximity to major export

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markets, thereby supporting the Vietnam organic fertilizer market.

Health Concerns and Preference for Organic Food Fuelling the Organic Fertilizer Demand

Owing to increased health awareness and well-being concerns, the Vietnamese population is demanding food that is free from harmful chemicals and additives. This has encouraged farmers to use organic fertilizers in the cultivation of food crops, instead of the traditional synthetic and chemical-based NPK Fertilizers. Moreover, a shift in food consumption patterns, owing to the growing preference for the vegan lifestyle, especially in Vietnam and its major export markets in the West, has raised the demand for organically produced food among consumers. According to industry reports, almost 1.8% of the total population in Vietnam were vegans and 10% were vegetarians in 2024. As this share grows in the coming years, the demand for organic food is expected to witness a sharp surge, having a similar impact on the demand for organic fertilizers.

Favourable Government Initiatives Enhancing the Vietnam Organic Fertilizer Market Development

The Ministry of Agriculture and Rural Development (MARD) adopted the "Project on Promotion of Production and Use of Organic Fertilisers until 2030, with a Vision to 2050" in the year 2023. The project aimed to promote the use of organic fertilizers in 50% of Vietnam's total cultivation area by 2050 and have at least 80% of centrally run cities and provinces build organic fertilizer farming models as part of its value chains. Moreover, 100% of the farming, animal husbandry, fisheries and household waste were to be used as organic fertilizer on both household and industrial production scales, according to the project's targets. Overall, the project aimed to raise the sales volumes of licensed organic fertilizers to over 30% of the total number of fertilizer products in the Vietnamese market, while increasing their production capacity to 5 million tonnes per year.

Vietnam Organic Fertilizer Market Trends

As per the Vietnam organic fertilizer market report, the adverse impacts of climate change and rising environmental pollution in the country have increased the urgency of practising sustainable agricultural methods, including the use of organic fertilizers during crop cultivation processes. The World Bank projected the greenhouse gas emissions from the agricultural sector in Vietnam to reach 109,341,000 tonnes by 2030, a rise of 7.84% in a decade. Using organic fertilizers made from biowaste, microorganisms, and organic minerals is expected to reduce these emissions by a significant amount as they are reported to have fewer negative impacts on soil health and the quality of crop yields. This, in turn, will enhance sustainable growth of the organic fertilizer market within the country.

Vietnam Organic Fertilizer Industry Segmentation

"Vietnam Organic Fertilizer Market Report and Forecast 2025-2034" offers a detailed analysis of the market based on the following segments:

Market Breakup By Source:

- ? Plant
 - ??? Molasses
 - ??? Cottonseed Meal
 - ??? Green Manure Cover Crops
 - ??? Others
- ? Animal?
 - ??? Animal Manure and Residues

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- ??? Fish Meal
- ??? Blood and Bone Meal
- ??? Chicken Litter
- ??? Others

- ? Mineral?

- ??? Rock Phosphates
- ??? Limestones
- ??? Greensand
- ??? Others

Market Breakup by Form:

- ? Dry
- ? Liquid

Market Breakup by Crop Type:

- ? Field Crops
- ? Horticultural Crops
- ? Turf and Ornamentals

Market Breakup by Application:

- ? Fertigation
- ? Foliar
- ? Soil

Market Breakup by Region:

- ? Southeast
- ? Red River Delta
- ? Mekong River Delta
- ? South Central Coast
- ? Others

Vietnam Organic Fertilizer Market Share

Plant-based fertilizers generated from crop residue is expected to gain traction in the market

The production of plant-based fertilizers is expected to gain traction in Vietnam organic fertilizer market, owing to the significant generation of plant waste and crop residue throughout the country. For instance, the Mekong River Delta, which leads the production of rice in Vietnam has been reported by the International Rice Research Institute (IRRI), to generate 24 million tonnes of rice straw every year. Out of this, only 30% or 7.4 million tonnes of straw are collected by farmers, while the rest are burned or buried in the fields. Vietnam organic fertilizer market key players are expected to tap into the huge potential of this crop residue to enhance the production of plant-based fertilizers in Vietnam.

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Besides, the Mekong Delta also generates a hefty 2.78 million tonnes of animal waste annually due to the high population of livestock animals, particularly pigs, poultry, and cattle. While a part of this waste is used for biogas generation and composting, a significant amount is either directly used as manure or as input materials in the production of animal-based fertilizers.

The share of liquid organic fertilizers is expected to increase owing to the development of new composting technologies

Industry stakeholders are making significant efforts to train Vietnamese farmers with the latest technologies for producing liquid organic fertilizers from organic waste. For instance, the International Rice Research Institute (IRRI) partnered with the Department of Crop Production and Plant Protection of Nam Dinh province in August 2024, to organise a training workshop and field demonstration for the production of liquid organic fertilizer through mechanised rice straw-based composting. The training was a part of the Fertilize Right (FerRight) project initiated by the US Department of Agriculture. The demonstration by an IRRI official involved converting rice straw into compost using a self-propelled mixer while maintaining the optimum temperature, moisture, and pH conditions. It was claimed to significantly reduce the decomposition time from 90 days to 45 days compared to traditional methods. According to the Vietnam organic fertilizer market analysis, the implementation of this project throughout the country in the coming years is expected to provide a major training boost to farmers on the production of liquid organic fertilizers from rice straw.

Introduction of efficient irrigation techniques driving the fertigation application of fertilizers

Fertigation involves mixing fertilizer products with irrigation systems to ensure that nutrients are delivered directly into the roots for enhanced absorption. Moreover, such application techniques reduce the wastage of fertilizers, otherwise seen in their external application. The method allows controlled and optimum fertilizer and water addition to the crops, resulting in high yields. To raise the preference for fertigation in Vietnam's agricultural fields, several national and international institutions are introducing upgraded and efficient irrigation systems ideal for fertilizer application, aiding the Vietnam organic fertilizer market growth. For instance, in 2021, the Embassy of Israel in Vietnam launched a solar-powered drip irrigation system to aid the increase in crop yield while using less water per unit of land, reducing environmental pollution.

Similarly, foliar application has also been witnessing rising popularity among exotic and seasonal fruit plants and crops, and their increased yields for domestic consumption and exports are indicative of the same. According to the Vietnam Fruit and Vegetable Association, the export turnover of certain foliar-applied fruits in the first quarter of 2024 showed tremendous growth over their 2023 limits. For instance, Durian exports rose by 63.3%, dragon fruit by 4.9%, banana by 25.6%, jackfruit by 46.1%, mango by 46.7%, and watermelon by 65.7%. Triple-digit growth in export turnover was seen in foliar-applied nuts such as coconut, longan, macadamia and almond, whose exports grew by 112.6%, 159.9%, 113.9% and 274.4% respectively. This is significantly supporting the Vietnam organic fertilizer market development.

Vietnam Organic Fertilizer Market Regional Analysis

Mekong River Delta Will Dominate the Organic Fertilizer Market Due to High Demand for Rice Crop Production

The Mekong River Delta, also known as the agricultural powerhouse of Vietnam, is expected to dominate the Vietnam organic fertilizer market owing to the immensely high production of rice crops. Located in the Southern region of Vietnam, the Delta accounted for 1,423.9 thousand hectares of harvested winter-spring rice in the first four months of 2024, sown over nearly 95.7% of the country's cultivable area. This was equal to 100.6% of the crops harvested during the same period in the previous year.

Moreover, the Mekong has been identified by industry stakeholders as an ideal ground for the implementation of a rice circular economy. According to the Vietnam organic fertilizer industry analysis, the region accounts for the highest share of rice straw,

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husk, and bran generated as agriculture waste which can easily be processed and developed into organic fertilizers.

Competitive Landscape

Key players are investing in the research and development of different kinds of bio-based fertilizer ingredients such as agricultural waste, microorganisms, and organic chemicals to increase the overall organic fertilizer consumption in Vietnam.

Baconco

Baconco Co., Ltd was founded in 1996 in the Ba Ria-Vung Tau Province province of Vietnam. Over the years the company has established itself as a leading distributor of fertilizers in the Vietnamese market with a network of more than 300 wholesalers and more than 5,000 retailers across the country. Moreover, it accounts for a major share of fertilizer exports in the Asia Pacific with footprints in over 32 nations.

Que Lam Group

Que Lam Group, based in Ho Chi Minh City, is a leading producer of organic fertilizer in Vietnam, especially in the Northern region. Its bio-organic fertilizer plant in the Northern province of Vinh Phuc is one of the largest in the country. Besides, the company has seven organic fertilizer plants and thirteen member companies across Vietnam that manufacture and distribute organic fertilizers domestically as well as internationally.

Binh Dien Fertilizer JSC

Established as a joint stock company in 2011, Binh Dien Fertilizer specialises in the production of NPK fertilizers in Vietnam. However, for the past few years, the company has been scaling its organic fertilizer production through its dedicated organic fertilizer plant established with an investment of VND 20 billion. The factory produced 10,000 tonnes of organic fertilizers annually during its initial phases which significantly impacted the Vietnam organic fertilizer market.

Bioway Hitech Fertilizer JSC

Established in 2012 in the Soc Trang province of the Mekong Delta, Bioway Hitech Fertilizer specialises in the production of organic fertilizers, organic mineral fertilizers, microbiological fertilizers and bio-organic fertilizers. It owns the largest microbiological plant in the Mekong Delta that specialises in the production of microbiological organic fertilizers with advanced technologies imported from the United States.

Other key players considered in the Vietnam organic fertilizer market report are Song Gianh Corporation, and Agrivari Co., Ltd., among others.

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