

India Nano Urea Market Assessment, By Crop Type [Cereals, Cash Crops, Horticulture Crops, Others], By Region, Opportunities and Forecast, FY2019-FY2033F

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Report description:

Indian nano urea market is projected to witness a CAGR of 14.78% during the forecast period FY2026-FY2033, growing from 20.61 million liters in FY2025 to 62.09 million liters in FY2033F, in terms of volume. Increasing demand for the sustainable and productive farming is one of the major drivers, as nano urea reduces environmental impact and increases crop yield. In addition, the government incentives for sustainable farming and subsidies on the use of nano urea further driving the demand. Furthermore, the cost advantage of nano urea over traditional fertilizers, along with its cost-saving logistics potential, also entice farmers. All these drivers propel the increasing use of nano urea, transforming the farming sector by offering a more sustainable and productive alternative to traditional fertilizers.

In November 2024, National fertilizers Limited announced its entry in the liquid nano urea production. The plant will be set up at Nangal with the production capacity of 1,50,000 bottles of 500 ml per day.

Government Support Driving the Nano Urea Market

The government of India has been encouraging the market for nano urea aggressively through a variety of initiatives. Despite controversy over its effectiveness, the government has issued a notification for the use of nano urea for three years, requiring its production by firms like Indian Farmers Fertiliser Cooperative Limited (IFFCO) under the Fertilizer Control Order, 1985. The government encourages nano urea through publicity, field demonstrations, and inclusion in the monthly availability plan. In addition, nano urea is available at Pradhan Mantri Kisan Samridhi Kendras to further enhance accessibility. Although there are no financial incentives to farmers who use nano fertilizers, the government's promotional efforts are aimed at more adoption and less dependency on conventional urea. IFFCO has also invested heavily in promoting nano urea, which aligns with the government's plans for reducing fertilizer subsidies and sustainable agriculture.

Till July 2024, the Indian government set up six nano urea and four nano DAP plants under the Fertilizer Control Order, 1985. The Department of Fertilizers has encouraged its PSUs, National Fertilizers Limited (NFL) and Rashtriya Chemicals & Fertilizers Limited (RCF), to increase the production of nano urea. To promote the use of nano fertilizers among farmers, various activities such as awareness camps, webinars, field demonstrations, Kisan Sammelans, and publicity in regional languages are being conducted.

Rising Need for Cost-Effective and Improved Crop Yield Fertilizers

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Indian nano urea demand is being spearheaded by cost-efficient and superior crop yield. Farmers are demanding alternatives that give higher productivity for less cost as well as without causing more ecological damage. Nano urea promises to increase crop production and reduce the use of chemical fertilizer, which is a response to these requirements. Nano urea offers a promising solution as it makes the nutrients more effective, with additional yield increases when used as a foliar spray. Its ability to reduce the use of conventional urea by enabling lower rates of nitrogen application without compromising yield is particularly appealing. In addition, the environmental benefit and ability of nano urea to promote greater nutrient uptake are in line with the government's vision for sustainable agriculture. As a result, farmers' interest in nano urea is increasingly picking up as they transition towards more sustainable production practices. This requirement is supplemented by government campaigns and promotions, serving to foster the use of nano urea in Indian agriculture even further.

In June 2024, Paradeep Phosphates Limited (PPL) has introduced two new products in the name of biogenic nano urea and nano DAP which will help in improving crop yield. The company branded these products as Jai Kisaan Navratna Nano Shakti nano urea and Jai Kissan Navratna Nano Shakti nano DAP. These products will provide the greater surface for nutrient absorption.

Technological Innovation in Fertilizer Manufacturing Process

The technological progress in the fertilizer manufacturing process is driving India's evolution in the nano urea market. Production of nano urea, supported by India's leading fertilizer manufacturers, uses advanced nanotechnology to optimize the delivery of plant nutrients. The technology supports effective foliar application and reduces the application of conventional urea and environmental load. The manufacturing process itself has been mechanized, with world-class units like the Aonla plant of leading player in India using advanced automation and green building technology. These not only improve production efficiency but also yield high-quality products of high-quality standards. Moreover, ongoing research and development activities like the introduction of new products like IFFCO's Nano Urea Plus are aimed at optimizing nitrogen content and increasing crop yields. Such technological upgrades complement the government's vision of low chemical fertilizer application and sustainable agriculture and further drive the market.

In May 2024, IFFCO began its production of nano urea plus fertilizer. With this product IFFCO now offers the nano urea product with higher nitrogen content. Nano urea plus fertilizer contains 16% nitrogen.

North India is Anticipated to Witness Robust Growth

North India, and particularly the Uttar Pradesh, Punjab, and Haryana states are expected to witness robust growth in demand for nano urea. It is a key agricultural region with a huge, cultivated area and huge fertilizer demand. The government's thrust to introduce nano urea as a green alternative to conventional urea will drive its consumption in the above-mentioned states. Uttar Pradesh, with its massive arable land, is likely to be a significant user of nano urea, with its large number of farmers. Punjab and Haryana, being places of intensive farming, are also likely to benefit from the economic and environmental advantages of nano urea. The sophisticated agricultural infrastructure in the area as well as government support will also drive the usage of nano urea, causing its high demand growth. Also, Uttar Pradesh is at the forefront of India's demand for nano urea. Due to its big agricultural sector and crop diversity, the state is a perfect place for the use of nano urea.

For instance, IFFCO has set up plants for nano fertilizer production in Uttar Pradesh. The Company invested around USD 75 million. The initiative, supported by Invest UP, the investment promotion agency of Uttar Pradesh government aimed to promote the use of nano fertilizers, particularly nano urea among farmers.

Future Market Scenario (FY2026 - FY2033F)

-□The vision of Indian government for reducing the reliance on urea imports through promoting the production of nano urea is enormously contributing to the market growth. Additionally, the initiatives like IFFCO nano urea in Fertilizer Control Order and a goal to transform a huge percentage of conventional urea to nano urea in the future.

-□It is an innovative controlled-release fertilizer with refined nutrient absorption, with less environmental pollution compared to regular fertilizers. This aligns well with the government's initiative towards sustainable agriculture, which should see the adoption increase.

-□Furthermore, the increased demand for efficient plant nutrition technologies in India and the need to improve crop yields at reduced input costs fuels the application of nano urea. It is cost-effective and has minimal or no environmental impact, which makes it an option for farmers.

-□Domestic companies' research and development efforts, such as collaborations, are boosting the production and quality of nano

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urea. The technology will further boost market growth by making products more effective and available.

Key Players Landscape and Outlook

The key players in the India nano urea market emphasizing on production capacity augmentation and building distribution networks. These players are leveraging government support and tie-ups to promote nano urea as the green solution to traditional fertilizers. The market is currently dominated by one large manufacturer, with multiple plants. These players are investing in innovative marketing and tie-ups with agricultural institutions to promote farmer adoption. With challenges in proving efficacy, they are still emphasizing the environmental benefits and potential yield increase of nano urea. These players' strategies involve further investments in technology and strategic tie-ups to improve market penetration and cope with the variable field trial results. Overall, they are attempting to coordinate their strategies to the government's priorities of reducing urea dependence and promoting sustainable agriculture.

In June 2024, Ray Nano Science & Research Centre and Hindustan Urvarak & Rasayan Limited (HURL) announced a strategic partnership to start nano urea manufacturing. The first plant will be established in Gorakhpur, Uttar Pradesh, to produce and distribute Nano Urea, paving the way for widespread adoption and substantial benefits for the agricultural sector. HURL, the largest conventional urea manufacturer in India.

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