Saudi Arabia Fertilizer - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

Market Report | 2026-02-09 | 80 pages | Mordor Intelligence

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Report description:

Saudi Arabia Fertilizer Market Analysis

Saudi Arabia fertilizer market size in 2026 is estimated at USD 0.86 billion, growing from 2025 value of USD 0.82 billion with 2031 projections showing USD 1.1 billion, growing at 5.03% CAGR over 2026-2031. This growth aligns with the Kingdom's strategy to utilize its natural gas feedstock advantages while implementing Vision 2030's food security and economic diversification goals. The market development is driven by domestic production quotas, increased adoption of precision irrigation, and the country's development as a global blue ammonia export center through carbon capture initiatives. Saudi Aramco achieved a significant milestone by completing the world's first certified bulk shipment of low-carbon ammonia to Japan in 2024, using carbon capture and storage technologies. The combination of this technological progress, government support for desert-soil bio-enhanced fertilizers research, and widespread implementation of precision irrigation systems indicates continued market growth, despite existing regulatory and competitive challenges.

Saudi Arabia Fertilizer Market Trends and Insights

Surge in Low-Carbon Blue-Ammonia Export Incentives

Saudi Arabia's blue ammonia export program uses carbon capture and storage technologies to produce low-carbon fertilizers for global markets. Saudi Aramco exported 40 metric tons of blue ammonia to Japan in 2024, validating the commercial feasibility of these exports. The Kingdom aims to produce 11 million metric tons of blue ammonia by 2030. Saudi fertilizer producers can obtain

15-20% price premiums compared to conventional ammonia while meeting carbon emission standards of importing countries. Government incentives for carbon capture projects improve the financial viability of blue ammonia production, providing Saudi Arabia with a competitive advantage over traditional fertilizer exporters. This transition to low-carbon production methods supports global emissions reduction goals while enabling the Kingdom to process its natural gas reserves into higher-value products.

Mandatory Domestic-Production Quotas Under Vision 2030 Food-Security Targets

Saudi Arabia's Vision 2030 framework establishes minimum domestic fertilizer production requirements to support food security goals. The Saudi Grains Organization has set procurement targets of 1.5 million metric tons of domestically produced wheat annually. These requirements ensure fertilizer manufacturers maintain production capacity for strategic crops, creating consistent demand for nitrogen and phosphate products. The country has achieved self-sufficiency in dates, dairy, and table eggs production, with surplus available for export. The government has allocated USD 400 million in 2023 to support small farming operations and agricultural cooperatives, increasing fertilizer usage in previously underserved segments. The domestic production requirements help protect local fertilizer demand from global price fluctuations while maintaining food security during supply chain disruptions.

New Agricultural Fertilizer Law Tightens Registration and Import Rules

Saudi Arabia's enhanced fertilizer registration requirements have increased compliance costs and market entry barriers, particularly affecting specialty and imported fertilizer products. The regulatory framework requires comprehensive product testing and documentation for all fertilizer formulations, with immediate implementation requirements that limit adjustment time for market participants. The regulations benefit established domestic producers with existing compliance infrastructure while creating obstacles for smaller importers and niche product suppliers. While the law's product safety and efficacy standards align with international practices, they increase operational costs for companies in the Saudi market. These compliance requirements may lead to market share consolidation among larger companies that can absorb regulatory costs, potentially restricting product innovation from smaller specialized suppliers.

Other drivers and restraints analyzed in the detailed report include:

Rapid Pivot to Precision Irrigation Boosting Water-Efficient Fertilizer BlendsGulf Cooperation Council (GCC) Natural-Gas Price Advantage Versus Global PeersCarbon-Border Taxes on High-Footprint Fertilizer Exports

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Straight fertilizers commanded 70.35% of the Saudi Arabia fertilizer market share in 2025, underpinned by abundant natural-gas and phosphate rock supplies. Nitrogenous grades such as granular urea feed the integrated chain that links SABIC Agri-Nutrients Company (Saudi Arabian Basic Industries Corporation) to Saudi Arabian Oil Company (Saudi Aramco) gas pipelines. The resulting cost curve insulates domestic plants from international volatility, anchoring export competitiveness. In contrast, complex fertilizers, though smaller, register a 6.53% CAGR, aligned with soil-testing campaigns that promote balanced nutrient packages. Farmer workshops financed by the Ministry of Environment, Water, and Agriculture (MEWA) illustrate the yield benefits of NPK (nitrogen-phosphorus-potassium) blends, nudging demand shift. Specialized micronutrient solutions gain traction where lab results expose sulfur and zinc deficiencies across date-palm orchards. These trends collectively funnel incremental value into the Saudi Arabia fertilizer market size, even as straight categories remain the revenue bulwark.

Complex fertilizers benefit from precision-agriculture rollouts that match multinutrient formulations with crop-stage needs.

Spray-grade NPK blends dovetail with automation rigs in greenhouse farms outside Jeddah, enabling uniform particle suspension. Localization efforts accelerate, with SABIC Agri-Nutrients piloting sulfur-coated NPK lines at its Al-Jubail site to mitigate leaching losses. Competitors eye joint ventures to secure phosphoric acid, while smaller formulators emphasize environmental profiles to satisfy carbon accounting standards. The widening palette of choices enriches supplier differentiation, reinforcing the Saudi Arabia fertilizer market appeal among progressive growers.

The Saudi Arabia Fertilizer Market Report is Segmented by Fertilizer Type (Complex Fertilizers and Straight Fertilizers), by Form (Granular and Liquid), and by Crop Application (Grains and Cereals, Pulses and Oilseeds, Fruits and Vegetables, Commercial Crops, and More). The Market Forecasts are Provided in Terms of Value (USD).

List of Companies Covered in this Report:

SABIC Agri-Nutrients Company (Saudi Arabian Basic Industries Corporation) Ma'aden Phosphate Company Saudi United Fertilizer Company (Al-Asmida) Al-Tayseer Chemical Industry Jas Global Industries Saf Sulphur Company Mosaic Company OCP Group Yara International Gulf Petrochemical Industries Company (GPIC) CF Industries Qatar Fertiliser Company (QAFCO)

Additional Benefits:

The market estimate (ME) sheet in Excel format
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Table of Contents:

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