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Global Fertilizers

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About This Report

Scope

This report forecasts to 2022 global demand for fertilizer by nutrient, market, and major world region in metric tons. Nutrient segments include:

- nitrogen
- phosphate
- potassium
- other nutrients such as secondary nutrients, micronutrients, and commercial natural organic fertilizers

Reported markets encompass:

- agricultural
- commercial and consumer

Major world regions include North America, Western Europe, Asia/Pacific, and all other regions.

To illustrate historical trends, world, nutrient, market, and regional demand (including nutrient and market segments) are provided for 2007, 2012, and 2017. Finally, global production is segmented by major world region and provided for 2007, 2012, 2017, and 2022.

On-site fertilizer production (e.g., animal waste and kitchen scraps) is excluded from the scope of this report. Unless otherwise noted, demand is given in metric tons (nutrient basis) and is evaluated at the manufacturers' level. Manufacturers' level-demand includes any formulation and additives included by the manufacturer in the fertilizer product shipped to distributors, retailers, and secondary formulators such as fertilizer application services or consumer formulators. Additional formulation by distributors, service companies, and end users is excluded.

For any given historical year, US dollar amounts are obtained from values expressed in the applicable local currency. These local currency values are converted to US dollars at the average annual exchange rate for that year. For forecast years, the US dollar amounts assume the same annual exchange rate as that prevailing in 2017.

Other various topics, including profiles of pertinent leading suppliers, are covered in this report. A full outline of report items by page is available in the Table of Contents.

Sources

Global Fertilizers (FW35077) is based on a [comprehensive industry study](#) published by The Freedonia Group. Reported findings represent the synthesis and analysis of data from various primary, secondary, macroeconomic, and demographic sources, such as:

- firms participating in the industry, and their suppliers and customers
- government/public agencies
- intergovernmental and non-governmental organizations
- trade associations and their publications
- the business and trade press
- indicator forecasts by The Freedonia Group
- the findings of other reports and studies by The Freedonia Group

Specific sources and additional resources are listed in the Resources section of this publication for reference and to facilitate further research.

Industry Codes

Table 10 | NAICS & SIC Codes Related to Fertilizer

| NAICS/SCIAN 2007 | | SIC | |
|---|--|------------------------------------|--|
| North American Industry Classification System | | Standard Industrial Classification | |
| 115112 | Soil Preparation, Planting, and Cultivating | 0711 | Soil Preparation Services |
| 212393 | Other Chemical and Fertilizer Mineral Mining | 0721 | Crop Planting, Cultivating, and Protecting |
| 325311 | Nitrogenous Fertilizer Manufacturing | 1470 | Chemical and Fertilizer Mineral Mining |
| 325312 | Phosphatic Fertilizer Manufacturing | 1479 | Chemical and Fertilizer Mineral Mining, NEC |
| 325314 | Fertilizer (Mixing Only) Manufacturing | 2873 | Nitrogenous Fertilizers |
| | | 2874 | Phosphatic Fertilizers |
| | | 2875 | Fertilizers, Mixing Only |
| | | 2819 | Industrial Inorganic Chemicals, NEC |
| | | 3295 | Minerals and Earths, Ground or Otherwise Treated |

Source: US Census Bureau

Table 11 | Relevant NACE Codes Related to Fertilizer

| NACE Code | Definition |
|-----------|---|
| 0891 | Mining of chemical and fertilizer minerals |
| 2015 | Manufacture of fertilisers and nitrogen compounds |

Source: European Commission

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Table 12 | Relevant HS Codes Related to Fertilizer

| HS Code | Definition |
|---------|--|
| 3101 | Animal or vegetable fertilizers, whether or not mixed together or chemically treated; fertilizers produced by the mixing or chemical treatment of animal or vegetable products |
| 3102 | Mineral or chemical fertilizers, nitrogenous |
| 3103 | Mineral or chemical fertilizers, phosphatic |
| 3104 | Mineral or chemical fertilizers, potassic |
| 3105 | Mineral or chemical fertilizers containing two or three of the fertilizing elements nitrogen, phosphorus, and potassium; other fertilizers |

Source: United Nations Statistics Division

Table 13 | Relevant SITC Codes Related to Fertilizer

| SITC Code | Definition |
|-----------|--|
| 272 | Crude fertilizers; fertilizers, animal or vegetable, whether or not mixed or chemically treated (excluding bone superphosphates) |
| 562 | Fertilizers, manufactured |

Source: United Nations Statistics Division

Freedonia Methodology

The Freedonia Group, a subsidiary of MarketResearch.com, has been in business for more than 30 years and in that time has developed a comprehensive approach to data analysis that takes into account the variety of industries covered and the evolving needs of our customers.

Every industry presents different challenges in market sizing and forecasting, and this requires flexibility in methodology and approach. Freedonia methodology integrates a variety of quantitative and qualitative techniques to present the best overall picture of a market's current position as well as its future outlook: When published data are available, we make sure they are correct and representative of reality. We understand that published data often have flaws either in scope or quality, and adjustments are made accordingly. Where no data are available, we use various methodologies to develop market sizing (both top-down and bottom-up) and then triangulate those results to come up with the most accurate data series possible. Regardless of approach, we also talk to industry participants to verify both historical perspective and future growth opportunities.

Methods used in the preparation of Freedonia market research include, but are not limited to, the following activities: comprehensive data mining and evaluation, primary research, consensus forecasting and analysis, ratio analysis using key indicators, regression analysis, end use growth indices and intensity factors, purchase power parity adjustments for global data, consumer and end user surveys, market share and corporate sales analysis, product lifespan analysis, product or market life cycle analysis, graphical data modeling, long-term

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historical trend analysis, bottom-up and top-down demand modeling, and comparative market size ranking.

Freedonia quantifies trends in various measures of growth and volatility. Growth (or decline) expressed as an average annual growth rate (AAGR) is the least squares growth rate, which takes into account all available datapoints over a period. The volatility of datapoints around a least squares growth trend over time is expressed via the coefficient of determination, or r^2 . The most stable data series relative to the trend carries an r^2 value of 1.0; the most volatile – 0.0. Growth calculated as a compound annual growth rate (CAGR) employs, by definition, only the first and last datapoints over a period. The CAGR is used to describe forecast growth, defined as the expected trend beginning in the base year and ending in the forecast year. Readers are encouraged to consider historical volatility when assessing particular annual values along the forecast trend, including in the forecast year.

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Home & Garden Pesticides: United States

Lawn & Garden Consumables: United States

Perlite & Vermiculite: United States

Pesticide Adjuvants: United States

Phosphate Rock: United States

Potash: United States

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AgUpdate

AgWeb

CropLife

Farm Industry News

World Fertilizer

Agencies & Associations

Association of American Plant Food Control Officials

Brazilian National Fertilizer Association

Eurostat

Fertiliser Association of India

Fertilizer Canada

Fertilizer Industry Round Table

The Fertilizer Institute

The Fluid Fertilizer Foundation

Food and Agriculture Organization

International Fertilizer Association

International Monetary Fund

World Bank