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

Market Report | 2025-04-28 | 291 pages | Mordor Intelligence

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Report description:

The Australia Fertilizer Market size is estimated at 6.51 billion USD in 2025, and is expected to reach 8.78 billion USD by 2030, growing at a CAGR of 6.17% during the forecast period (2025-2030).

Higher consumption is being driven by increased climatic events, such as floods, impacting major horticultural crop regions

- In 2022, field crops dominated the Australian fertilizer market, accounting for 97.2% of both its value and volume. Soil-based fertilizers commanded the lion's share of the market at 96.2%, with fertigation trailing at 2.0%. The lower adoption of fertigation, compared to soil-based fertilizers, can be attributed to its reliance on drip irrigation. Notably, only a small fraction of farmers, even among those cultivating field crops, employ surface drip (9%) or sub-surface drip (2%) irrigation.
- Horticulture crops secured the second-largest market share, valued at USD 138.5 million in 2022. The horticulture fertilizers market faced a setback in 2020-2021 due to severe flooding in key horticulture regions like Queensland and New South Wales. However, buoyed by robust overseas demand for premium fruits and vegetables, the fertilizer market is poised to register a 5.6% CAGR from 2023 to 2030. This growth is driven by the need to optimize plant growth, crop yield, and quality.
- The market for fertilizers catering to turf and ornamental crops reached USD 81.1 million in 2022, with a projected CAGR of 5.5% during 2023-2030. This growth is fueled by a rising demand for fertilizers to enhance the health and aesthetics of these plants.
- Moreover, farmers are increasingly recognizing the advantages of water-soluble and liquid fertilizers across various crop types. These fertilizers are swiftly absorbed by plants, facilitating rapid and efficient nutrient uptake. Consequently, the market for such fertilizers is anticipated to register a 5.0% CAGR during 2023-2030.

Australia Fertilizer Market Trends

Australia has witnessed an increase in the acreage of field crops since 2021. The acreage increased by 2.8% between 2021 and 2022

- Wheat, barley, canola, sorghum, and cotton dominate Australia's field crop landscape. Wheat, in particular, holds the lion's share, covering 50.2% of the total field cropland. The leading states in field crop production are Western Australia, New South Wales, South Australia, Victoria, and Queensland. However, these states grappled with a severe drought in 2019, resulting in a 9.5% drop in acreage compared to the previous year.
- Since 2021, Australia has witnessed a notable increase in field crop acreage, with a 2.8% increase between 2021 and 2022. This surge can be attributed to both global and domestic demand for agricultural products, particularly wheat, barley, sorghum, and canola. Notably, a significant portion of Australian wheat is exported, with a remarkable 64% surge in exports seen in 2022-23 compared to 2019-2020.
- The expansion of acreage is also fueled by rising farmer incomes, buoyed by favorable seasonal conditions and surging commodity prices. Additionally, the ongoing grain dispute between Ukraine and Russia, centered around the Black Sea, has further bolstered Australian wheat prices, benefiting local farmers.
- Government initiatives, including subsidies and incentives, have played a pivotal role in encouraging farmers to expand their field crop acreage. These policies, aimed at boosting agricultural production and export potential, were evident in the Australian government's USD 30 million investment in 2023. This funding was specifically earmarked to help grain growers navigate risks such as drought and market volatility.
- Given the trends of expanding crop acreage, rising farm incomes, robust government support, and growing global and domestic demand, the demand for fertilizers is poised to surge.

Among field crops, wheat stands out with its significant requirement of 228.8 kg per hectare

- Major field crops, including corn, rice, wheat, sorghum, soybean, canola, and cotton, have varying nutrient requirements. Wheat tops the list, requiring 228.8 kg/hectare, followed by rice at 155.4 kg/hectare, corn at 148.4 kg/hectare, cotton at 119.1 kg/hectare, canola at 110.0 kg/hectare, sorghum at 95.2 kg/hectare, and soybean at 61.2 kg/hectare. These primary nutrients are crucial for the healthy growth and optimal grain production of field crops.
- Among the primary nutrients, nitrogen is the most heavily applied, with an average rate of 221.4 kg/hectare. Nitrogen plays a pivotal role in grain production, particularly in leaf and stem development, which directly impacts photosynthesis and grain formation. Phosphorus, another essential nutrient, is typically applied as phosphate fertilizers like diammonium phosphate (DAP) or monoammonium phosphate (MAP), at an average rate of 60.1 kg/ha.
- Potassium is vital for plants, aiding in water absorption, enzyme activation, and overall health maintenance. On average, 90.2 kg/hectare of potassium is applied. In Australia, the agricultural sector grapples with a salinity problem, affecting over a million hectares of previously productive land. Consequently, the application of potash, a potassium fertilizer, is on the rise in the country.
- It is important to note that primary nutrient requirements can vary based on factors like soil quality, crop variety, and regional

conditions. Given their significance as the main nutrient source for crops, the application rates of primary nutrients are expected to witness substantial growth in the coming years, driven by concerns about soil depletion and leaching.

Australia Fertilizer Industry Overview

The Australia Fertilizer Market is fragmented, with the top five companies occupying 27.38%. The major players in this market are ICL Group Ltd, Incitec Pivot Fertilisers, K+S Aktiengesellschaft, WESFARMERS LIMITED and Yara International ASA (sorted alphabetically).

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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