

## **Brazil Fertilizers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)**

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### **Report description:**

The Brazil Fertilizers Market size is estimated at 37.73 billion USD in 2025, and is expected to reach 49.68 billion USD by 2030, growing at a CAGR of 5.66% during the forecast period (2025-2030).

Growing adoption of fertilizers to ensure food security is expected to drive the market

- Continuous long-term farming without crop rotation has depleted farmland fertility in Brazil, necessitating increased fertilizer usage. Rising environmental concerns have further bolstered the demand for sustainable fertilizers in field crops.
- In 2022, field crop fertilizers dominated the market, accounting for 96.2% of the country's market value. This segment is projected to witness a CAGR of 5.6%. Intensive and monoculture practices have depleted soil nutrients in field crops, necessitating higher fertilizer application to boost yields and enhance soil health.
- In 2022, horticultural crop fertilizers represented 3.8% of Brazil's fertilizer market. The horticulture cultivation area decreased from 3.4 million hectares in 2017 to 3.3 million hectares in 2022. To compensate for the reduced cultivation area, farmers are intensifying fertilizer usage, aiming for higher yields and improved crop quality.
- The turf and ornamental industry is forecasted to record a CAGR of 5.4% during the study period, with a market share of less than 1% in 2022. This is primarily due to their smaller cultivation areas compared to other crops. In recent years, the production of turf and ornamental plants has surged, driven by increased demand across various applications, further fueling the fertilizer market for better nutrient management and aesthetic plant quality.
- Factors such as recent droughts, escalating water scarcity, and nutrient deficiencies from intensive agricultural practices are poised to propel the fertilizer market in the country as farmers seek solutions to maintain productivity and crop health.

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## Brazil Fertilizers Market Trends

The increased global demand for food and animal feed have led to the expansion of field crop acreage

- Over the years, Brazil has transitioned from being a major food grain importer to a significant exporter of key crops like soybean, rice, maize/corn, and cotton. With a growing arable land and an expanding area dedicated to field crops, Brazil's agricultural sector is poised for further diversification. The country witnessed a notable uptick in the area under field crop cultivation, rising from 61.0 million hectares in 2017 to 70.2 million hectares in 2022, marking a 15.9% increase.
- Soybean, a crucial commercial and oilseed crop, dominates Brazil's agricultural landscape, accounting for a substantial 57.51% of the cultivated area, followed by corn at 26.5%. In 2022, Brazil's soybean production hit a record 153 million tonnes, boasting a yield of 3.533 tonnes per hectare. Notably, Brazil is set to retain its position as the world's largest soybean producer, with the United States and Argentina trailing behind. Key agricultural regions in Brazil include Mato Grosso, Parana, Rio Grande Do Sul, Sao Paulo, and Goias.
- Brazil's cropping calendar encompasses two seasons, i.e., September to March and February to July. The first season, spanning September to March, typically yields higher than the second. In the 2021/2022 crop year, Brazil's wheat yield stood at 2.89 metric tons per hectare, marking a slight increase from the previous year's 2.8 tons per hectare. The surging demand for field crops, both domestically and internationally, has spurred a significant expansion in Brazil's cultivation areas. This expansion is expected to have a direct and positive impact on the country's fertilizer market in the coming years.

Rapeseed is the most nitrogen-consuming crop grown in Brazil

- In 2022, Brazil witnessed an average application rate of 175.6 kg/ha for primary nutrients, which are the most widely used fertilizers. These nutrients are crucial for crop growth and yield, and their deficiency can impede plant development. Out of the primary nutrients, nitrogen takes the lead in Brazil, with an average application rate of 194.8 kg/ha. Canola/rapeseed tops the list as the most nitrogen-demanding crop, with an application rate of 396 kg/ha. Following closely are cotton, corn, and sorghum, requiring 274 kg/ha, 271 kg/ha, and 264 kg/ha of nitrogen, respectively. Nitrogen's significance lies in its role in protein formation, as well as its presence in plant amino acids and nucleotides, which are pivotal for growth and development.
- Potassium, the second most consumed primary nutrient, saw an average application rate of 182.8 kg/ha in 2022. Its importance lies in enhancing crop resistance against pests and diseases, aiding nutrient and water transportation, and ensuring overall plant survival. Notably, canola, cotton, sorghum, and soybean stand out as high potassium-demanding crops, with application rates of 283.8 kg/ha, 260.4 kg/ha, 219.2 kg/ha, and 192 kg/ha, respectively.
- Phosphorous fertilizer ranks third in consumption, with an average application rate of 149.1 kg/ha for field crops in 2022. Canola/rapeseed leads the pack in phosphorous consumption at 197.39 kg/ha, trailed by corn/maize, soybean, and cotton at 192 kg/ha, 180.9 kg/ha, and 172.1 kg/ha, respectively. Primary nutrients, including phosphorous, aid in root system development and energy transfer within plants.

## Brazil Fertilizers Industry Overview

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The Brazil Fertilizers Market is fragmented, with the top five companies occupying 30.19%. The major players in this market are ICL Group Ltd, Nortox, Nutrien Ltd., The Mosaic Company 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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