

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

Market Report | 2025-04-28 | 189 pages | Mordor Intelligence

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Report description:

The Brazil Specialty Fertilizer Market size is estimated at 1.99 billion USD in 2025, and is expected to reach 2.64 billion USD by 2030, growing at a CAGR of 5.86% during the forecast period (2025-2030).

Water soluble fertilizers dominated the Brazil specialty fertilizers market.

- The variety of nutrient grades and application options, including foliar, fertigation, and soil application, drive the demand for water-soluble fertilizers. These fertilizers' value increased by 67.5% during 2017-2022. The benefits of water-soluble fertilizers are they can distribute nutrients directly at the root zone and increase nutrient uptake. Using this strategy helps lower fertilizer application rates by 25.0%.
- The liquid fertilizer segment accounted for 53.8%, valued at USD 944.6 million in 2022, with a volume of 933.7 thousand metric tons. Since 2017, the consumption volume of liquid fertilizers has been steadily increasing because they give plants quicker access to nutrients than conventional fertilizers. They are particularly well suited for application to promote root growth early in the growing season.
- Polymer-coated fertilizers account for 1.6% of the CRF market in 2022. The coating material and coating process used in polymer-coated fertilizer technologies differ considerably between manufacturers. Depending on the crop requirements, the rate of nutrient release from a polymer-coated product can be controlled to some extent by varying the coating's characteristics and types, thickness, and the ratio of different coating materials.
- The rise in imported fertilizers is responsible for the decline in market value in 2020. The COVID-19 logistical and production crisis, followed by a labor shortage and a disturbance in the supply chain, also played a role in the drop in market value. However, the market grew significantly in the years that followed.

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- Some factors driving the specialty fertilizers market are increased demand for high-efficiency fertilizers, ease of application, adoption of sustainable farming practices, and increased environmental safety.

Brazil Specialty Fertilizer Market Trends

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

- Brazil has become self-sufficient in crop production. From being the major importer of food grains, the country emerged as a large exporter of important crops like soybean, rice, maize/corn, and cotton. Agriculture in Brazil has high potential in the cultivation of diversified crops due to increasing arable land and area under cultivation of field crops. The area under the cultivation of field crops in Brazil increased from 61.0 million hectares in 2017 to 70.2 million hectares in 2022 with an increase of 15.9%.
- Soybean dominates Brazil's agricultural landscape, accounting for 57.51% of the cultivated area, followed by corn at 26.5%. In 2022, Brazil's soybean production hit 153 million tonnes, boasting a yield of 3.533 tonnes per hectare. Brazil is poised to retain its position as the world's leading soybean producer, trailed by the United States and Argentina. Key agricultural regions in Brazil include Mato Grosso, Parana, Rio Grande Do Sul, Sao Paulo, and Goias.
- Brazil experiences two cropping seasons: September to March and February to July. The first season, spanning September to March, yields higher than the second. During the 2021-2022 crop year, wheat production in Brazil reached 2.89 metric tons per hectare, a slight uptick from the previous year's 2.8 tons per hectare. The growing demand, both domestically and internationally, for field crops has spurred a significant expansion in cultivation areas. This expansion is anticipated to have a direct and positive impact on the Brazilian fertilizer market during 2023-2030.

Rapeseed being the most nitrogen-consuming crop in Brazil

- In Brazil, primary nutrients dominate the fertilizer consumption landscape, with an average application rate of 175.6 kg/ha in 2022. These nutrients are crucial for crop growth and yield, and their scarcity can impede plant development. Among primary nutrients, nitrogen is the most applied in the country, and the application rate of nitrogen on average is 194.8 kg/ha. Canola/rapeseed is the most nitrogen-consuming crop, with an application rate of 396 kg/ha, followed by cotton, corn, and sorghum, amounting to 274 kg/ha, 271kg/ha, and 264 kg/ha, respectively. The large requirement of nitrogen is because of its role in plant protein formation. It contains amino acids and nucleotides, which are the base for plant growth and development, and is the second most sought-after primary nutrient, with an average application rate of 182.8 kg/ha in 2022. Its importance stems from its ability to bolster crop resilience against pests and diseases, facilitate nutrient and water transport, and ensure overall plant survival. Canola, cotton, sorghum, and soybean are notable potassium consumers, with rates of 283.8 kg/ha, 260.4 kg/ha, 219.2 kg/ha, and 192 kg/ha, respectively.
- Phosphorous, ranking third in primary nutrient consumption, saw an average application rate of 149.1 kg/ha in field crops in 2022. Canola/rapeseed leads the pack here as well, with an application rate of 197.39 kg/ha, followed by corn, soybean, and cotton at 192 kg/ha, 180.9 kg/ha, and 172.1 kg/ha, respectively. Primary nutrients, including phosphorous, contribute to robust root systems and energy transfer in plants.

Brazil Specialty Fertilizer Industry Overview

The Brazil Specialty Fertilizer Market is moderately consolidated, with the top five companies occupying 45.63%. The major players in this market are K+S Aktiengesellschaft, Sociedad Quimica y Minera de Chile SA, The Mosaic Company, TIMAC Agro 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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