

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

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Report description:

Australia Fertilizer Market Analysis

The Australia fertilizer market was valued at USD 6.51 billion in 2025 and estimated to grow from USD 6.91 billion in 2026 to reach USD 9.28 billion by 2031, at a CAGR of 6.09% during the forecast period (2026-2031). Rising domestic urea capacity, government incentives for green ammonia, and widening adoption of precision agriculture tools are propelling demand, while supply-chain resilience priorities are nudging growers toward locally produced inputs. Continued infrastructure spending, exemplified by the Perdaman Karratha complex, underpins long-term volume growth, and specialty formulations are gaining traction in high-value horticulture and protected cropping systems. Competitive intensity remains fragmented, with the top five suppliers leveraging vertically integrated distribution networks to secure customer loyalty. Policy shifts such as the Hydrogen Headstart program and tightening heavy-metal standards are reshaping cost structures and product portfolios, adding both opportunity and compliance pressure across the Australia fertilizer market.

Australia Fertilizer Market Trends and Insights

Surge in Domestic Urea? Ammonium Nitrate Plants

Australia's fertilizer landscape is experiencing a fundamental shift with two major urea-ammonium nitrate facilities scheduled for commissioning between 2025-2027. Perdaman's AUD 6 billion Karratha facility will produce 2.3 million tons annually, while Woodside's acquisition of the Beaumont New Ammonia project adds another 1.1 million tons of capacity, with first production

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targeted for hydrogen in half of 2026 . This domestic capacity expansion addresses Australia's heavy import dependence, where the nation currently imports over 2.1 million tons of fertilizer annually, with urea accounting for a significant volume of total imports. The strategic timing coincides with global supply chain disruptions and volatile shipping costs, positioning Australian producers to capture import substitution opportunities while reducing exposure to international price volatility and logistics constraints.

Federal Subsidies for Green-Ammonia Projects Under Australia's Hydrogen Headstart Program

In 2023, the Australian government's AUD 814 million (USD 536.9 million) Hydrogen Headstart program represents a paradigm shift toward low-carbon fertilizer production, with green ammonia projects receiving unprecedented federal support. In 2021, the Australian Renewable Energy Agency (ARENA) committed AUD 103.3 million (USD 68.1 million) to multiple green hydrogen-to-ammonia initiatives, including Yara Pilbara's feasibility study and Origin Energy's Hunter Valley development. The regulatory influence extends beyond production subsidies, with the Clean Energy Regulator developing measurement and verification protocols for green ammonia under the Australian Carbon Credit Unit scheme, creating additional revenue streams for low-emission fertilizer producers.

Rising Natural-Gas Prices Increasing Ammonia Production Costs

Australia's ammonia production costs face significant pressure from volatile natural gas prices, with spot LNG exceeding USD 12 per million British thermal units during peak demand periods. Natural gas represents approximately 70% of ammonia production costs, making fertilizer manufacturers highly sensitive to energy price fluctuations. The Australian Energy Market Operator has warned of supply constraints in eastern states, particularly during winter peak demand periods, which coincide with key fertilizer application seasons. This cost pressure is driving strategic responses, including long-term gas supply contracts, energy efficiency investments, and accelerated adoption of renewable energy sources for electrolytic hydrogen production.

Other drivers and restraints analyzed in the detailed report include:

Widespread Adoption of Variable-Rate Technology (VRT) Among Broad-Acre Growers
Soil-Carbon Trading Schemes Boosting Demand for Bio-Enhanced NPK Blends
Tightening Limits on Cadmium and Heavy-Metal Content In Imported Fertilizers

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

Segment Analysis

Straight fertilizers led with an 86.90% revenue share in 2025 and are projected to advance at a 6.12% CAGR through 2031, serving specialized applications, including top-dressing operations and specific nutrient corrections. Nitrogenous products, such as urea, represent the largest straight fertilizer category due to Australia's nitrogen-deficient soils. Within straight fertilizers, micronutrients are experiencing accelerated growth, driven by soil testing programs that reveal widespread zinc, boron, and copper deficiencies across Australian cropping regions. Zinc deficiency affects approximately 58% of Australian agricultural soils, resulting in a sustained demand for zinc sulfate and chelated zinc products.

The segment encompasses various nutrient-specific fertilizers such as nitrogenous, phosphatic, and potassic variants, with nitrogenous fertilizers contributing the major share. The demand for straight fertilizers is particularly strong in field crops, which represent the largest application area. The segment's growth is being driven by the increasing need to improve production to meet the rising demand for food, coupled with the expansion of agricultural cultivation areas. The segment benefits from farmers' preference for these fertilizers due to their ability to address specific nutrient deficiencies in crops and their compatibility with various application methods, including soil application and fertigation. The use of granular fertilizers within this segment enhances

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nutrient delivery efficiency.

Conventional fertilizers maintained a 93.85% market share in 2025, reflecting the sector's reliance on granular and prilled products, which are suited to mechanical spreading equipment prevalent in Australian broad-acre systems. Farmers across Australia predominantly favor conventional fertilizers due to their proven track record in agricultural applications and well-established distribution networks. The segment's strength is further reinforced by its compatibility with traditional farming practices and the extensive range of products available for different crop types. The lower price point of conventional fertilizers makes them particularly attractive to large-scale agricultural operations where cost management is crucial. The segment's robust performance is also supported by the country's strong agricultural export sector, which drives steady demand for reliable and economical fertilizer solutions, including solid fertilizers.

Speciality formulations are anticipated to grow at a 6.55% CAGR to 2031, this accelerated growth is driven by increasing adoption of sustainable agricultural practices and the rising demand for high-efficiency fertilizer products. The segment's expansion is further supported by growing awareness among farmers about the benefits of precision agriculture and environmental stewardship. Specialty fertilizers, particularly CRFs, are gaining traction due to their ability to reduce nutrient leaching and optimize nutrient uptake efficiency. The segment is also benefiting from technological advancements in coating materials and release mechanisms, making these products more effective and reliable for various crop applications.

The Australia Fertilizer Market is Segmented by Type (Complex and Straight), by Form (Conventional and Specialty), by Application Mode (Fertigation, Foliar, and Soil), and by Crop Type (Field Crops, Horticultural Crops, and Turf and Ornamental). The Market Forecasts are Provided in Terms of Value (USD) and Volume (Metric Tons)

List of Companies Covered in this Report:

WESFARMERS LIMITED Yara International ASA ICL Group Ltd K+S Aktiengesellschaft Incitec Pivot Fertilisers Nutrien Ltd. Koch Industries Inc. Haifa Group Compo Expert GmbH EuroChem Group AG Omnia Holdings Ltd. Sumitomo Chemical Co., Ltd. CSBP Limited (Wesfarmers Limited) Ballance Agri-Nutrients Limited Ravensdown Co-operative Limited

Additional Benefits:

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

Table of Contents:

1 INTRODUCTION

1.1 Study Assumptions & Market Definition

1.2 Scope of the Study

1.3 Research Methodology

2 REPORT OFFERS

3 EXECUTIVE SUMMARY & KEY FINDINGS

4 KEY INDUSTRY TRENDS

4.1 Acreage Of Major Crop Types

4.1.1 Field Crops

4.1.2 Horticultural Crops

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- 4.2 Average Nutrient Application Rates
 - 4.2.1 Micronutrients
 - 4.2.1.1 Field Crops
 - 4.2.1.2 Horticultural Crops
 - 4.3 Primary Nutrients
 - 4.3.1 Field Crops
 - 4.3.2 Horticultural Crops
 - 4.4 Secondary Macronutrients
 - 4.4.1 Field Crops
 - 4.4.2 Horticultural Crops
 - 4.5 Agricultural Land Equipped For Irrigation
 - 4.6 Regulatory Framework
 - 4.7 Value Chain & Distribution Channel Analysis
 - 4.8 Market Drivers
 - 4.8.1 Surge in domestic urea/ammonium nitrate plants
 - 4.8.2 Federal subsidies for green-ammonia projects under Australia's Hydrogen Headstart program
 - 4.8.3 Widespread adoption of variable-rate technology (VRT) among broad-acre growers
 - 4.8.4 Soil-carbon trading schemes boosting demand for bio-enhanced NPK blends
 - 4.8.5 Phosphate rock supply-chain shocks from Morocco and China elevating import substitution
 - 4.8.6 Rapid expansion of controlled-environment horticulture in peri-urban zones
 - 4.9 Market Restraints
 - 4.9.1 Rising natural-gas prices increasing ammonia production costs
 - 4.9.2 Tightening limits on cadmium and heavy-metal content in imported fertilizers
 - 4.9.3 Water-allocation volatility in Murray Darling Basin discouraging fertilizer use
 - 4.9.4 Growing on-farm composting reducing synthetic nutrient demand

5 MARKET SIZE AND GROWTH FORECASTS (VALUE AND VOLUME)

- 5.1 Type
 - 5.1.1 Complex
 - 5.1.2 Straight
 - 5.1.2.1 Micronutrients
 - 5.1.2.1.1 Boron
 - 5.1.2.1.2 Copper
 - 5.1.2.1.3 Iron
 - 5.1.2.1.4 Manganese
 - 5.1.2.1.5 Molybdenum
 - 5.1.2.1.6 Zinc
 - 5.1.2.1.7 Others
 - 5.1.2.2 Nitrogenous
 - 5.1.2.2.1 Urea
 - 5.1.2.2.2 Others
 - 5.1.2.3 Phosphatic
 - 5.1.2.3.1 DAP
 - 5.1.2.3.2 MAP
 - 5.1.2.3.3 SSP
 - 5.1.2.3.4 TSP
 - 5.1.2.4 Potassic

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- 5.1.2.4.1 MoP
- 5.1.2.4.2 SoP
- 5.1.2.4.3 Others
- 5.1.2.5 Secondary Macronutrients
 - 5.1.2.5.1 Calcium
 - 5.1.2.5.2 Magnesium
 - 5.1.2.5.3 Sulfur
- 5.2 Form
 - 5.2.1 Conventional
 - 5.2.2 Speciality
 - 5.2.2.1 CRF
 - 5.2.2.2 Liquid Fertilizer
 - 5.2.2.3 SRF
 - 5.2.2.4 Water Soluble
- 5.3 Application Mode
 - 5.3.1 Fertigation
 - 5.3.2 Foliar
 - 5.3.3 Soil
- 5.4 Crop Type
 - 5.4.1 Field Crops
 - 5.4.2 Horticultural Crops
 - 5.4.3 Turf & Ornamental

6 COMPETITIVE LANDSCAPE

- 6.1 Key Strategic Moves
- 6.2 Market Share Analysis
- 6.3 Company Landscape
- 6.4 Company Profiles (includes Global Level Overview, Market Level Overview, Core Business Segments, Financials, Headcount, Key Information, Market Rank, Market Share, Products and Services, and Analysis of Recent Developments).
 - 6.4.1 WESFARMERS LIMITED
 - 6.4.2 Yara International ASA
 - 6.4.3 ICL Group Ltd
 - 6.4.4 K+S Aktiengesellschaft
 - 6.4.5 Incitec Pivot Fertilisers
 - 6.4.6 Nutrien Ltd.
 - 6.4.7 Koch Industries Inc.
 - 6.4.8 Haifa Group
 - 6.4.9 Compo Expert GmbH
 - 6.4.10 EuroChem Group AG
 - 6.4.11 Omnia Holdings Ltd.
 - 6.4.12 Sumitomo Chemical Co., Ltd.
 - 6.4.13 CSBP Limited (Wesfarmers Limited)
 - 6.4.14 Ballance Agri-Nutrients Limited
 - 6.4.15 Ravensdown Co-operative Limited

7 KEY STRATEGIC QUESTIONS FOR FERTILIZER CEOS

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