

Brazil Fertilizers - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2026 - 2031)

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Report description:

Brazil Fertilizers Market Analysis

The Brazil fertilizer market was valued at USD 37.73 billion in 2025 and estimated to grow from USD 39.84 billion in 2026 to reach USD 52.32 billion by 2031, at a CAGR of 5.59% during the forecast period (2026-2031). Robust grain output, an import reliance for plant nutrients, and aggressive domestic capacity additions are the primary forces behind this trajectory. Record soybean production and expanding double-cropped corn acreage sustain year-round nutrient demand, while credit subsidies under Plano Safra strengthen farm input purchasing power. Supply chain diversification away from Russia toward Canada and Morocco is stabilizing potash and phosphate availability, and specialized blends that improve nutrient-use efficiency are gaining traction as environmental regulations tighten. Consolidation among producers, exemplified by Petrobras, ICL, and Mosaic, is reshaping competitive strategies even as digital farming tools shift procurement from bulk commodities to prescription-based solutions.

Brazil Fertilizers Market Trends and Insights

Rising Global Demand for Cereals and Oilseeds

Brazil anchors global protein supply as the top soybean exporter and as a fast-growing corn shipper, so any uptick in Asian feed or vegetable-oil requirements quickly filters into nutrient demand. Mato Grosso alone contributes 28% of national soybean output, creating a logistics-centered fertilizer pull that improves scale economies for bulk importers. Corn plantings rose to 22.3 million hectares in 2024/25, and a widespread second-crop system sustains application across two calendar windows, smoothing

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seasonal volatility. Export price premiums enlarge growers' working-capital pools, allowing timely fertilizer purchases when global prices soften. Continuous grain rotations also intensify micronutrient depletion, boosting demand for zinc and boron products that complement primary NPK blends. Regional cooperatives increasingly leverage forward-purchase contracts to align fertilizer arrivals with harvest cash-flow peaks, reinforcing a virtuous cycle between export receipts and input spending.

Shift toward Specialty Fertilizers

Farmers now pursue nutrient-use efficiency as yields climb toward biome limits. Controlled-release granules and water-soluble liquids gain market share because they lower leaching losses and satisfy emerging watershed rules in Sao Paulo and Parana. The specialty segment's 5.90% CAGR, therefore, outpaces conventional demand by a wide margin, driven further by biological inoculants that unlock native soil nitrogen. Premium pricing is accepted because biological fixation saved an estimated high in synthetic nitrogen costs. Multinational suppliers respond by acquiring domestic innovators to blend microbes with coated NPKs, creating hybrid solutions marketed as "nutrient stewardship packages."

Volatility in Natural-Gas and Phosphate-Rock Prices

Nitrogen fertilizer costs track international gas benchmarks, and phosphate FOB Morocco quotes feed directly into DAP and MAP invoices. Brazil, sourcing 85% of its nutrients abroad, remains a price-taker; a rapid gas rally in late 2024 lifted urea offers above USD 420 per metric ton, compressing farm margins before summer planting. Domestic producers cover only a small share of demand, so hedging tools are limited to importers with foreign-exchange credit lines. Freight surcharges linked to Red Sea tensions added USD 25 per metric ton on phosphate cargos in early 2025, exposing Mato Grosso growers to input shocks that co-op credit cannot fully absorb. Such volatility weighs on the near-term CAGR, although Petrobras' planned nitrogen restarts could dilute import exposure later in the decade.

Other drivers and restraints analyzed in the detailed report include:

Government Subsidy Programs in Emerging Economies
Precision-Agriculture Led Micro-Dosing Practices
Environmental Regulations on Nitrogen Runoff

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

Segment Analysis

Straight formulations captured 92.40% of Brazil fertilizers market share in 2025, reflecting growers' preference for single-nutrient precision that aligns with diverse soil prescriptions. Nitrogenous urea and ammonium nitrate remain the workhorses in corn and sugarcane rotations, whereas MAP and DAP fulfill phosphorus needs despite tight global supply. Within the Brazil fertilizers market size, complex blends are climbing at a 7.02% CAGR because variable-rate spreaders now calibrate multi-nutrient ratios on the fly, letting a single granule deliver balanced nutrition.

Crop consultants increasingly encourage site-specific mixes that address sulfur and boron deficiencies detected in Cerrado soils. Blenders respond by offering "N-P-K-S-B" packages labeled for region and crop, accelerating complex uptake. Yet the logistical convenience of straight fertilizers imported in Panamax lots, stored in inland terminals, and trucked in bulk preserves their cost advantage. The interplay of agronomic precision versus scale economics will define share movements through 2031, but straight products will likely keep a dominant majority as raw-material imports remain streamlined and price-competitive.

Conventional fertilizers commanded 94.55% of the Brazil fertilizers market size in 2025, underpinned by established distribution chains and compatible farm machinery. Specialty products post a 5.74% CAGR as water-soluble powders and coated prills address

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efficiency and environmental targets. The Brazil fertilizers market increasingly values polymer-coated urea that slows volatilization, especially where urea prices have risen and nitrogen loss penalties have tightened.

Liquid formulations are another bright spot because fertigation acreage is rising in fruit and vegetable belts. Suppliers now pair micronutrient chelates with NPK liquids for homogenous tank-mixes that feed crops through growth peaks. Biological inoculants, registered across 37 crops, integrate into these solutions, creating multi-functional blends. Early adopters validate performance gains, prompting co-ops to stock refurbished mixing equipment to capture rising specialty margins, a trend likely to chip away at conventional share, albeit gradually.

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

List of Companies Covered in this Report:

Nutrien Ltd. Grupa Azoty S.A. (Compo Expert) Yara International ASA ICL Group Ltd. The Mosaic Company K+S Aktiengesellschaft Sociedad Quimica y Minera de Chile SA Coromandel International Ltd. (Murugappa Group) Wilmar International Ltd. EuroChem Group PhosAgro PJSC OCI Global CF Industries Holdings Inc. OCP Group Nortox S/A

Additional Benefits:

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

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