

GLOBAL FERTILIZER MARKET WEEKLY REPORT

SEPTEMBER – 8 to 13, 2025



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Coverage: Sep 8 – Sep 13, 2025

Executive Summary

The global fertilizer market saw notable developments in prices, supply, and sustainability. In the United States, retail fertilizer prices showed mixed trends, with diammonium phosphate (DAP) rising 5% to \$862 per ton, while urea and other fertilizers saw minor fluctuations. Higher costs for phosphates, nitrogen, and potash are increasing pressure on farm margins, accounting for around 7% of production expenses.

India faced acute fertilizer shortages, prompting farmer protests in Ganjam, Odisha. The National Human Rights Commission issued notices to state authorities, while the government assured full supply to meet the 2025–26 foodgrain production target of 362.5 million tons. India is also planning a second green ammonia tender to boost sustainable fertilizer production.

In Brazil, ammonium sulfate imports reached record levels due to higher availability and competitive pricing. Adecoagro acquired Nutrien Ltd's 50% stake in Profertil, and Petrobras plans to restart the Bahia and Sergipe nitrogen fertilizer plants by year-end. Paraguay's Villeta Project will produce low-carbon calcium ammonium nitrate (CAN) using renewable hydropower under a 10-year offtake agreement with Yara International.

The U.S. Sage Potash Project in Utah secured a \$14 million USDA grant to produce 300,000 tons per year, reducing import reliance. Ethiopia and Nigeria's Dangote Group signed an agreement to build a 3 million tons per year urea plant in Gode, with Dangote holding 60% and the Ethiopian government 40%.

Innovation progressed as Brazil's Verde AgriTech patented an eco-friendly fertilizer process using glauconitic siltstone and beneficial microorganisms. Peregrine Hydrogen partnered with Morocco's OCP Group to scale electrolyzer technology producing green hydrogen and sulfuric acid for low-carbon fertilizer production.

Global supply remains critical, with Russia forecasting 45 million tons of exports in 2025, though geopolitical tensions could disrupt shipments. Long-term agreements between Saudi Arabia's Ma'aden and India will supply 3.1 million metric tons of DAP annually for five years, enhancing supply security. The period highlights price volatility, strategic investments, and growing focus on sustainable fertilizer solutions worldwide.



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United States

- **Fertilizer Prices Rise Amidst Market Volatility:** In the second week of September, retail fertilizer prices showed mixed trends. Diammonium phosphate (DAP) prices increased by 5% compared to the previous month, reaching an average of \$862 per ton. Other fertilizers also experienced price fluctuations, reflecting ongoing market volatility.
 - **Farm Economy Faces Fertilizer Cost Pressures:** The U.S. farm economy is under strain due to rising fertilizer costs, particularly for phosphates, nitrogen, and potash. These increases are squeezing farm margins, with fertilizer and lime accounting for 7% of production expenses.
 - **Utah Potash Project Receives USDA Grant:** On September 15, Sage Potash, a Canada-based company, secured a \$14 million grant from the U.S. Department of Agriculture (USDA) to develop the Sage Plain Potash Project in Utah's Paradox Basin. The project aims to produce 300,000 tons per year of potash, addressing the U.S.'s reliance on imports for this critical fertilizer component.
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India

- **Fertilizer Shortages Prompt Protests:** Farmers in Ganjam district staged protests demanding urgent urea supplies amid a fertilizer crisis. The shortage is affecting crop productivity during the critical Kharif season.
- **NHRC Issues Notice Over Fertilizer Shortage:** The National Human Rights Commission (NHRC) issued notices to chief secretaries and directors general of police across India regarding the severe shortage of fertilizers, particularly impacting the Kharif crop season.
- **Government Assures Fertilizer Supply:** Agriculture Minister Chouhan assured that fertilizers will be supplied in totality as per the demand from states, in coordination with the Ministry of Chemicals and Fertilizers, to meet the foodgrain production target of 362.5 million tons for the 2025-26 crop year.
- **Planning for Second Green Ammonia Tender:** India is planning to launch another round of renewable ammonia tenders in the medium term, once it completes the pending requirements from the first round, aiming to boost sustainable fertilizer production.



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Brazil

- **Strategic Fertilizer Production Agreement:** Brazil signed a technical cooperation agreement between public and private players aimed at producing more than 73 million tons of fertilizers by 2036, strengthening its institutional and regulatory framework in the fertilizer sector.
- **Petrobras to Restart Fertilizer Plants:** Brazil's state-owned energy company Petrobras plans to restart its Bahia and Sergipe nitrogen fertilizer factories, formerly leased to Unigel, by the end of 2025. This move aims to enhance domestic fertilizer production capacity.
- **Brazil's Record Ammonium Sulfate Imports:** As of September 10, Brazil's ammonium sulfate (AS) imports have reached a record high for the first eight months of 2025. This surge is attributed to high availability and more attractive prices, leading buyers to prefer AS over urea.
- **UK-Brazil Fertilizer Partnership:** On September 10, the UK and Brazil launched a "historic partnership" to enhance the sustainability and efficiency of fertilizer production. The memorandum of understanding (MoU) focuses on collaborative research, innovation, and best practices to reduce the environmental impact of fertilizers, which are responsible for approximately 5% of global greenhouse gas emissions. This initiative aligns with both nations' commitments to environmental leadership ahead of COP30.
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- **Adecoagro Acquires Profertil Stake:** On September 9, Adecoagro S.A., a sustainable production company in South America, announced it has signed an agreement to acquire Nutrien Ltd's 50% interest in Profertil S.A., one of the largest producers of granular urea in South America.
- **Yara Signs Offtake Agreement with ATOME:** On September 12, Yara International ASA signed a definitive 10-year offtake agreement with ATOME to purchase the entire fertilizer production from the Villeta Project in



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Paraguay. The fertilizer will be produced using 100% renewable power, supporting sustainable agricultural practices.

Ethiopia

- **Ethiopian Agricultural Businesses Seeks DAP Imports:** On September 8, Ethiopian Agricultural Businesses (EABC) announced plans to buy 549,000 tons of diammonium phosphate (DAP) for the country's 2025–26 season. The tender is due to close in mid-September 2025.

Vietnam

- **Vietnam's Fertilizer Imports Predicted to Slow in 3Q25:** As of August 11, Vietnam's imports of various fertilizers are expected to slow in the third quarter of 2025. Strong arrivals in the first half of 2025 and slower domestic sales could weigh on import demand

Key Insights

Conclusion:

Underscores a highly dynamic global fertilizer market, driven by rising demand, price volatility, and strategic investments in production and sustainability. Phosphate and nitrogen fertilizers remain under pressure from supply constraints and strong crop-season demand, while potash and Rock Phosphate exhibit relative stabilization.

Countries like India, Brazil, the U.S., and Ethiopia are investing in expanding production capacities and entering long-term supply agreements to secure domestic and regional needs. Simultaneously, sustainability and decarbonization initiatives—such as low-carbon CAN production and green hydrogen integration—are gaining prominence, reflecting the sector's long-term transformation toward environmentally responsible practices.

Overall Insight: The global fertilizer market is balancing short-term supply challenges and price pressures with long-term strategic expansion and sustainability efforts, making it a critical sector for global food security and agricultural growth.

Welcome to FERTILIZERFIELD

At FERTILIZERFIELD, we empower farmers, Fertilizer professionals, and industry stakeholders with accurate and timely fertilizer data. Our mission is to provide a comprehensive, reliable, and easy-to-use platform that supports informed decision-making in the Fertilizer-agricultural sector.

Who We Are

FERTILIZERFIELD is a cutting-edge online news and database platform dedicated exclusively to fertilizer prices. Our team of experts and analysts works tirelessly to gather, process, and deliver the latest market information. We bridge the gap between raw data and actionable insights, helping you navigate the complexities of the agricultural economy.

What We Offer

Our platform is a one-stop solution for all your fertilizer-related needs, featuring:

- **Market Trends:** Insights into the latest trends and forecasts shaping the industry.
- **In-Depth Analysis:** Expert reports to help you understand market dynamics.
- **News Updates:** Timely updates on industry developments, regulations, and more.
- **Project Updates:** Information on current and upcoming fertilizer-related projects.
- **Import-Export Data:** Comprehensive details on fertilizer trade activities.
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