

Low-Carbon Fertilizers Market Forecasts to 2034 – Global Analysis By Fertilizer Type (Green Ammonia-Based Fertilizers, Blue Ammonia-Based Fertilizers, Nitrogen Fertilizers, Phosphate Fertilizers, Potash Fertilizers, Organic and Bio-Based Fertilizers, Enhanced-Efficiency Fertilizers and Other Low-Carbon Fertilizers), Production Technology, Feedstock, Nutrient, Application, End User and By Geography

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Abstracts

According to Statistics MRC, the Global Low-Carbon Fertilizers Market is accounted for \$4.7 billion in 2026 and is expected to reach \$13.8 billion by 2034 growing at a CAGR of 14.4% during the forecast period. Low-carbon fertilizers refer to nitrogen, phosphate, and potassium-based nutrient products manufactured using renewable energy sources, green hydrogen, carbon capture technologies, or recovered nutrient pathways that substantially reduce greenhouse gas emissions associated with conventional fertilizer production. These sustainable fertilizers include green ammonia-based products produced from renewable hydrogen, blue ammonia with carbon capture, organic and bio-based alternatives, and enhanced-efficiency formulations that reduce nitrogen losses.

Market Dynamics:

Driver:

Agricultural Decarbonization Pressures

Growing agricultural decarbonization commitments and national climate targets are encouraging fertilizer manufacturers, agricultural cooperatives, and large farming

operations to adopt lower-carbon nutrient solutions. Conventional fertilizer production, particularly nitrogen fertilizer manufacturing, generates substantial greenhouse gas emissions, creating pressure to reduce product-level carbon intensity. Carbon pricing mechanisms, sustainability-linked financing, corporate Scope 3 reduction targets, and environmentally focused procurement programs are strengthening demand for verified low-carbon fertilizers. Increasing emphasis on sustainable food production and climate-smart agriculture is further accelerating investment in cleaner fertilizer production technologies.

Restraint:

Green Premium Price Challenges

Premium pricing for low-carbon fertilizers remains a significant market restraint, particularly for green ammonia-based products manufactured using renewable hydrogen. Commodity crop producers typically operate under tight margins and remain highly sensitive to fertilizer input costs, making it difficult for premium products to achieve widespread adoption without clear financial benefits. Furthermore, limited availability of competitively priced renewable electricity, electrolyzers, and green hydrogen infrastructure increases production costs. Insufficient commercial-scale supply of green ammonia and uncertain willingness among agricultural buyers to absorb price premiums can constrain market penetration.

Opportunity:

Carbon-Linked Fertilizer Products

Carbon-linked fertilizer products represent an emerging opportunity by enabling farmers and agricultural enterprises to combine nutrient procurement with measurable emissions-reduction strategies. Fertilizers supported by verified carbon-intensity data, sustainability certifications, and recognized emission-reduction methodologies can potentially generate additional economic value through voluntary carbon markets and sustainability-linked supply agreements. As food manufacturers and retailers strengthen Scope 3 emissions targets, demand for lower-carbon agricultural inputs is increasing across supply chains. Development of standardized carbon accounting, product certification, and traceability frameworks can further improve market transparency and support premium positioning.

Threat:

Conventional Fertilizer Price Volatility

Volatility in conventional fertilizer prices creates competitive uncertainty for low-carbon

alternatives, particularly when natural gas prices decline and conventional nitrogen fertilizer production becomes more economical. Geopolitical disruptions, energy-market fluctuations, export restrictions, and changes in feedstock availability can produce significant swings in fertilizer pricing. During periods of low conventional fertilizer prices, farmers may prioritize established commodity products over premium low-carbon alternatives. Limited long-term price visibility and uncertain return on sustainability investments can also discourage agricultural buyers from entering multi-year procurement agreements for emerging low-carbon fertilizer products.

COVID-19 Impact

The COVID-19 pandemic disrupted fertilizer supply chains, manufacturing operations, logistics networks, and agricultural production patterns, contributing to considerable volatility in nutrient availability and pricing. Transportation restrictions and labor shortages affected fertilizer distribution across several markets, while uncertainty surrounding food production increased concerns about agricultural input security. At the same time, governments introduced green recovery initiatives and increased emphasis on resilient and sustainable food systems. These developments strengthened interest in cleaner agricultural inputs and encouraged early investments in low-carbon fertilizer technologies, renewable hydrogen integration, and more sustainable nutrient production pathways.

The Green Ammonia-Based Fertilizers segment is expected to be the largest during the forecast period

The Green Ammonia-Based Fertilizers segment is expected to account for the largest market share during the forecast period, primarily because ammonia is the fundamental feedstock for producing major nitrogen fertilizers. Replacing conventional hydrogen derived from natural gas with renewable hydrogen can substantially reduce the carbon intensity of ammonia production. Increasing investments in renewable power, electrolyzers, and green hydrogen infrastructure are creating a foundation for commercial-scale green ammonia production. Projects across Europe, North America, and Asia are advancing toward commercial operations, while fertilizer manufacturers are increasingly evaluating green ammonia as a pathway for meeting decarbonization targets.

The Green Hydrogen-Based Production segment is expected to have the highest CAGR during the forecast period

Over the forecast period, the Green Hydrogen-Based Production segment is predicted to witness the highest growth rate, during the forecast period, driven by substantial investments in renewable electrolysis capacity and government incentives supporting hydrogen development. Falling electrolyzer costs, expanding renewable power generation, and improving technology efficiency are gradually strengthening the economics of green hydrogen production. Increased availability of renewable hydrogen

can support the decarbonization of ammonia manufacturing and other energy-intensive fertilizer processes. Government subsidies, hydrogen production incentives, and large-scale renewable energy projects are further accelerating capacity deployment and improving the long-term commercial viability of green hydrogen-based fertilizer production.

Region with largest share:

During the forecast period, the North America region is expected to hold the largest market share, supported by significant investments in clean hydrogen production, established fertilizer manufacturing infrastructure, and substantial agricultural demand. The United States is implementing major incentives and investment programs designed to expand domestic clean hydrogen production and reduce industrial emissions. Leading fertilizer companies, including CF Industries, Nutrien, and OCI Global, are investing in lower-carbon ammonia and fertilizer production pathways. Existing ammonia infrastructure, abundant renewable energy resources, and federal incentives for emissions reduction further support regional market development.

Region with highest CAGR:

Over the forecast period, the Asia Pacific region is anticipated to exhibit the highest CAGR, supported by enormous fertilizer consumption, expanding agricultural production, and increasing government focus on hydrogen-based industrial decarbonization. China and India are developing policies and investment programs aimed at expanding renewable hydrogen and reducing emissions from energy-intensive chemical industries. Australia is also advancing large-scale green hydrogen projects with potential applications in ammonia production and fertilizer exports to Asian markets. Rapid industrialization, growing food demand, renewable energy expansion, and increasing sustainability requirements are expected to accelerate low-carbon fertilizer adoption throughout the region.

Key players in the market

Some of the key players in Global Low-Carbon Fertilizers Market include Yara International ASA, CF Industries Holdings, Inc., OCI Global, Nutrien Ltd., thyssenkrupp AG, Uniper SE, Maire S.p.A., Topsoe A/S, ACME Group, EuroChem Group AG, ICL Group Ltd., The Mosaic Company, K+S AG, Coromandel International Limited, Indian Farmers Fertiliser Cooperative Limited, Deepak Fertilisers and Petrochemicals Corporation Limited, Rashtriya Chemicals and Fertilizers Limited, and CF Industries Holdings, Inc.

Key Developments:

In August 2026, ara announced a commercial-scale green ammonia production plant in Norway powered by renewable hydropower. The zero-emission facility produces clean nitrogen inputs to decarbonize European agriculture and shipping.

In July 2026, CF Industries began green ammonia production at its Louisiana complex utilizing renewable electrolysis. The facility produces low-carbon fertilizer alternatives, accelerating agricultural decarbonization across domestic and global markets.

In June 2026, OCI Global partnered to produce blue ammonia integrated with carbon capture technologies. Designed for European markets, the low-carbon feedstock significantly reduces the carbon footprint of imported agricultural products.

Fertilizer Types Covered:

Green Ammonia-Based Fertilizers

Blue Ammonia-Based Fertilizers

Nitrogen Fertilizers

Phosphate Fertilizers

Potash Fertilizers

Organic and Bio-Based Fertilizers

Enhanced-Efficiency Fertilizers

Other Low-Carbon Fertilizers

Production Technologies Covered:

Green Hydrogen-Based Production

Blue Ammonia Production

Carbon Capture and Storage

Biological Nitrogen Fixation

Nutrient Recovery

Low-Emission Fertilizer Production

Hybrid Production Technologies

Feedstocks Covered:

Renewable Electricity

Water

Natural Gas with Carbon Capture

Biomass

Organic Waste

Recovered Nutrients

Other Low-Carbon Feedstocks

Nutrients Covered:

Nitrogen

Phosphorus

Potassium

Micronutrients

Multi-Nutrient Fertilizers

Applications Covered:

Cereals and Grains

Oilseeds and Pulses

Fruits and Vegetables

Commercial Crops

Turf and Ornamentals

Protected Agriculture

Other Agricultural Applications

End Users Covered:

Large-Scale Commercial Farms

Small and Medium-Sized Farms

Agricultural Cooperatives

Fertilizer Manufacturers

Greenhouse Operators

Landscaping and Turf Management Companies

Government and Agricultural Organizations

Regions Covered:

North America

United States

Canada

Mexico

Europe

United Kingdom

Germany

France

Italy

Spain

Netherlands

Belgium

Sweden

Switzerland

Poland

Rest of Europe

Asia Pacific

China

Japan

India

South Korea

Australia

Indonesia

Thailand

Malaysia

Singapore

Vietnam

Rest of Asia Pacific

South America

Brazil

Argentina

Colombia

Chile

Peru

Rest of South America

Rest of the World (RoW)

Middle East

Saudi Arabia

United Arab Emirates

Qatar

Israel

Rest of Middle East

Africa

South Africa

Egypt

Morocco

Rest of Africa

What our report offers:

Market share assessments for the regional and country-level segments

Strategic recommendations for the new entrants

Covers Market data for the years 2023, 2024, 2025, 2026, 2027, 2028, 2030, 2032 and 2034

Market Trends (Drivers, Constraints, Opportunities, Threats, Challenges, Investment Opportunities, and recommendations)

Strategic recommendations in key business segments based on the market estimations

Competitive landscaping mapping the key common trends

Company profiling with detailed strategies, financials, and recent developments

Supply chain trends mapping the latest technological advancements

Free Customization Offerings:

All the customers of this report will be entitled to receive one of the following free customization options:

Company Profiling

Comprehensive profiling of additional market players (up to 3)

SWOT Analysis of key players (up to 3)

Regional Segmentation

Market estimations, Forecasts and CAGR of any prominent country as per the client's interest (Note: Depends on feasibility check)

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