

Global Muriate of Potash (MOP) Market 2026

Market size, segmentation, competitive landscape and outlook

2021-2031

Moving forward, together



Every one of us has, at some point, heard the line from *Alice in Wonderland*: “It takes all the running you can do, to keep in the same place. If you want to get somewhere else, you must run at least twice as fast.” Cliché as the quote has become, our world is changing at extraordinary speed. And yet, to my mind, it matters not only to run fast, but — more importantly — to know where you are running.

We see ourselves as the navigator, ready at the right moment to point out the correct course. By providing current, timely information for the decisions that matter, we aim to protect our clients from missteps and to help them find new opportunities.

It matters to us that you are satisfied with the work we have done. If you have any questions about this report, we will be glad to answer them.

ANDREY SHEVCHENKO, Managing Partner

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Market at a glance

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Indicator	Value
Market size (2025)	USD 26.4 bn
Forecast (2031)	USD 35.2 bn
CAGR (2021-2031)	4.9%
Study period	2021-2031
Largest region	Asia-Pacific · 43%
Fastest-growing region	Latin America · 5.8%
Market concentration	High
Licence	Individual / Company

The global Muriate of Potash (MOP) Market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Agricultural fertilizer accounts for XX% of demand as growers replenish potassium removed by grain, oilseed, fruit, vegetable, sugar and starch crops. Asia-Pacific is the largest consumption region, while Latin America records the fastest growth on expanding soybean, corn, sugarcane and second-crop acreage. Supply remains concentrated in Canada, Russia and Belarus, making mine ramp-ups, sanctions, freight access and national fertilizer policies central to market pricing and procurement.

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Executive summary

The global Muriate of Potash (MOP) Market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Agricultural fertilizer accounts for XX% of demand as growers replenish potassium removed by grain, oilseed, fruit, vegetable, sugar and starch crops. Asia-Pacific is the largest consumption region, while Latin America records the fastest growth on expanding soybean, corn, sugarcane and second-crop acreage. Supply remains concentrated in Canada, Russia and Belarus, making mine ramp-ups, sanctions, freight access and national fertilizer policies central to market pricing and procurement.

Indicator	Value
Market size 2025	XXX
Forecast 2031	XXX
CAGR	XXX
Largest region	XXX
Fastest region	XXX

Key findings

- The global MOP market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global potassium chloride demand reached approximately XXX tonnes in 2025, according to Nutrien.
- USGS placed 2025 world potash mine production at XXX tonnes of K2O equivalent and annual production capacity at XXX tonnes of K2O.
- USGS projects world potash production capacity to reach XXX tonnes of K2O by 2029, led principally by MOP projects in Laos and Russia.
- Canada produced approximately XXX tonnes of MOP in 2024 and exported XXX tonnes, according to Natural Resources Canada.
- Canada, Russia and Belarus supplied almost XX% of global potassium chloride exports in 2024.
- Agricultural fertilizer represented XX% of 2025 MOP market value, with direct application accounting for XX% of demand.
- Granular MOP led the grade mix with XX% of 2025 market value because it is preferred for mechanized spreading and bulk blends.

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Market size and forecast

Market value by year, USD bn

Indicator	2026	2027	2028	2029	2030	2031	CAGR
Market value, USD bn	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Market volume	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Production	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Imports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Exports	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Apparent consumption	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Year-over-year value change

Indicator	2027	2028	2029	2030	2031	CAGR
Market value	X%	X%	X%	X%	X%	X%
Production	X%	X%	X%	X%	X%	X%
Imports	X%	X%	X%	X%	X%	X%
Exports	X%	X%	X%	X%	X%	X%

Source: XXX

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Global Muriate of Potash Market Trends and Growth Drivers

MOP occupies a distinctive position in agricultural input markets: potassium is indispensable to plant water regulation, disease resistance, stalk strength and crop quality, while economically scalable substitutes for mined potash do not exist. Demand therefore follows nutrient removal over the long run, but annual purchasing can vary sharply as farmers adjust application timing to crop prices, exchange rates and fertilizer affordability.

Supply economics are equally structural. High-grade deposits are geographically concentrated, mines require multibillion-dollar investment and Saskatchewan exporters depend on long rail movements to coastal terminals. Russia and Belarus possess large low-cost operations but face changing sanctions, financing and logistics conditions, making trade-flow redirection a permanent feature of the market.

The 2027-2031 period introduces a new supply cycle led by Jansen and additions in Russia and Laos. This capacity arrives as Brazil, Southeast Asia and parts of Africa intensify nutrient use, creating a contest between incremental tonnes and incremental agronomic demand. Producer discipline, commissioning performance and distribution investment will decide whether new supply primarily expands consumption or pressures benchmark prices.

Growth drivers

Soil potassium replenishment

Intensive harvesting removes substantial potassium from agricultural soils, particularly where crop residues are exported or burned. Soil testing and yield-targeted nutrient plans are converting this agronomic deficit into recurring MOP demand across grain, oilseed and sugar-producing regions.

Brazilian row-crop expansion

Brazil's soybean, second-crop corn, sugarcane and pasture systems require large imported potassium volumes because domestic output covers only a small fraction of consumption. Acreage expansion, double cropping and yield intensification reinforce Latin America's position as the fastest-growing regional MOP market.

Balanced-fertilization policy

Government soil-health programs and nutrient-based subsidy systems are directing attention beyond nitrogen toward phosphorus and potassium. India is especially influential because subsidy rates, maximum retail economics and centralized import decisions can rapidly alter MOP affordability and application.

Compound NPK capacity growth

Expansion of compound-fertilizer and bulk-blending capacity raises demand for consistent, high-analysis potassium chloride feedstock. Producers able to supply uniform granular or standard MOP specifications secure recurring contracts with NPK formulators and regional blenders.

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Farm-income and affordability recovery

Stronger crop margins and favorable potash-to-crop price ratios allow farmers to restore applications deferred during price spikes. The effect is strongest in price-responsive markets where distributors manage inventories closely and nutrient rates change between seasons.

Import and logistics investment

Additional port storage, rail links, inland terminals and blending plants shorten delivery times and reduce the working capital required to serve seasonal demand. These investments expand addressable demand in Brazil, Africa and Southeast Asia, where logistics can represent a substantial portion of farm-gate cost.

Restraints

Price-driven application deferral

Farmers can temporarily mine residual soil potassium when MOP prices rise faster than crop prices. This creates sharp seasonal demand corrections, inventory destocking and lower distributor purchasing even when long-run nutrient requirements remain intact.

Sanctions and trade friction

Restrictions involving Belarusian and Russian supply complicate shipping, financing, insurance and access to particular ports. Product can be redirected, but longer routes and narrower counterparties increase delivered-cost volatility and procurement risk.

Chloride-sensitive crop substitution

Tobacco, berries, potatoes and selected horticultural crops can require lower-chloride potassium sources to protect quality. Sulphate of potash and potassium nitrate therefore cap MOP penetration in premium specialty-crop programs despite their higher nutrient cost.

Currency and subsidy constraints

MOP is traded predominantly in US dollars, exposing import-dependent markets to exchange-rate depreciation and fiscal decisions. Delayed subsidy reimbursement or reduced nutrient support can weaken importer liquidity, elevate retail prices and shift purchases between seasons.

New-supply price pressure

Capacity additions in Canada, Russia and Laos will increase competition for seaborne and cross-border demand. Faster-than-expected ramp-ups could compress producer realizations and postpone investment in higher-cost brownfield or greenfield projects.

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Muriate of Potash Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Soil potassium replenishment	XXX	XXX	XXX
Brazilian row-crop expansion	XXX	XXX	XXX
Balanced-fertilization policy	XXX	XXX	XXX
Compound NPK capacity growth	XXX	XXX	XXX
Farm-income and affordability recovery	XXX	XXX	XXX
Import and logistics investment	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Price-driven application deferral	XXX	XXX	XXX
Sanctions and trade friction	XXX	XXX	XXX
Chloride-sensitive crop substitution	XXX	XXX	XXX
Currency and subsidy constraints	XXX	XXX	XXX
New-supply price pressure	XXX	XXX	XXX

Source: XXX

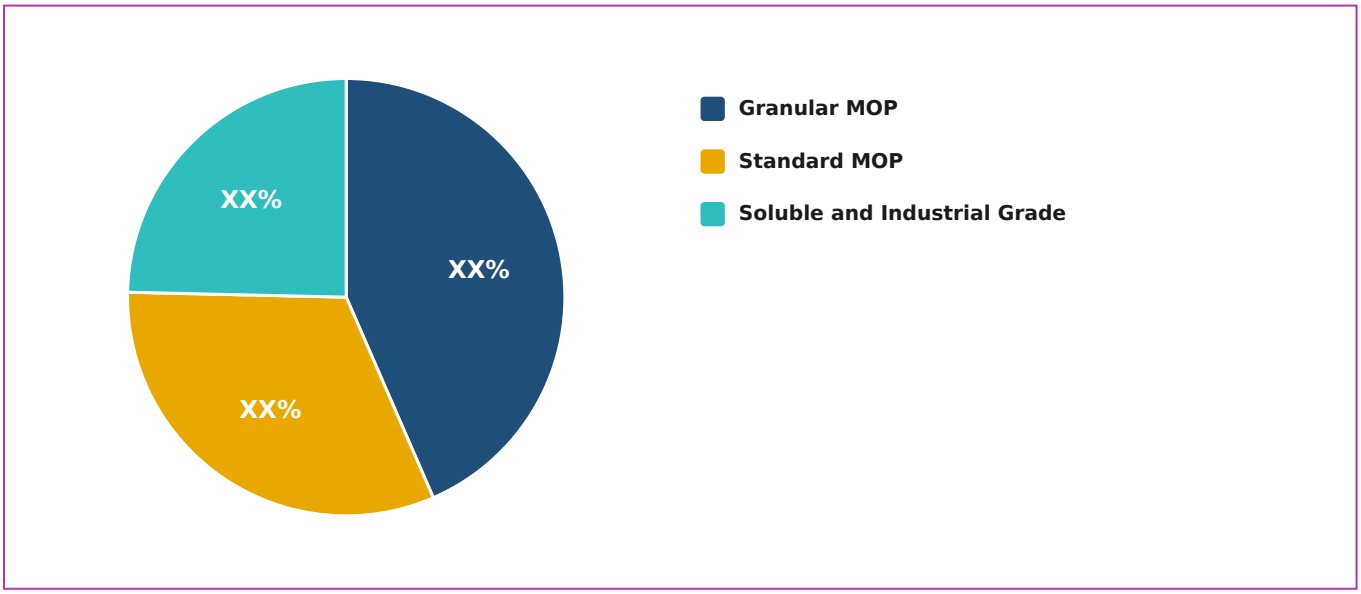
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Muriate of Potash Market Segmentation by Grade, Application and Crop

By Grade

Granular MOP commands the largest value share because its particle-size consistency supports bulk blending, mechanical spreading and lower segregation during handling. Standard MOP remains essential for compound NPK production and markets using manual or localized application. Soluble and industrial grades grow fastest from a small base as users demand tighter impurity and dissolution specifications.

Value share by grade, 2025



Source: XXX

Value by grade, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Granular MOP	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Standard MOP	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Soluble and Industrial Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Direct field application leads because MOP supplies high-analysis potassium at the lowest mainstream nutrient cost. Compound NPK and bulk blending gain share where soil tests, crop-specific grades and mechanized farming support customized nutrient ratios. Industrial demand is smaller but diversified across potassium chemicals, water treatment, drilling fluids and selected food-processing chains.

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Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Fertilizer Application	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Compound NPK and Bulk Blending	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Industrial Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Crop Group

Cereals and grains form the largest crop segment because of their enormous planted area and recurrent potassium removal. Oilseeds gain fastest as soybean and oil-palm production expands in Brazil and Southeast Asia. Fruits and vegetables generate high application value per hectare, although chloride-sensitive crops selectively shift toward alternative potassium products.

Value by crop Group, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cereals and Grains	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Oilseeds and Pulses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fruits and Vegetables	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Sugar and Starch Crops	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Crops and Pasture	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Large importers, fertilizer manufacturers and national buyers procure most MOP through direct contracts or producer marketing organizations to secure volume and freight. Regional distributors remain critical for inventory positioning, credit and last-mile delivery. Digital tenders and spot platforms grow fastest as price transparency improves, although they remain secondary to relationship-based contracting.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Contracts and Producer Marketing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Agricultural Retailers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Digital Tenders and Spot Platforms	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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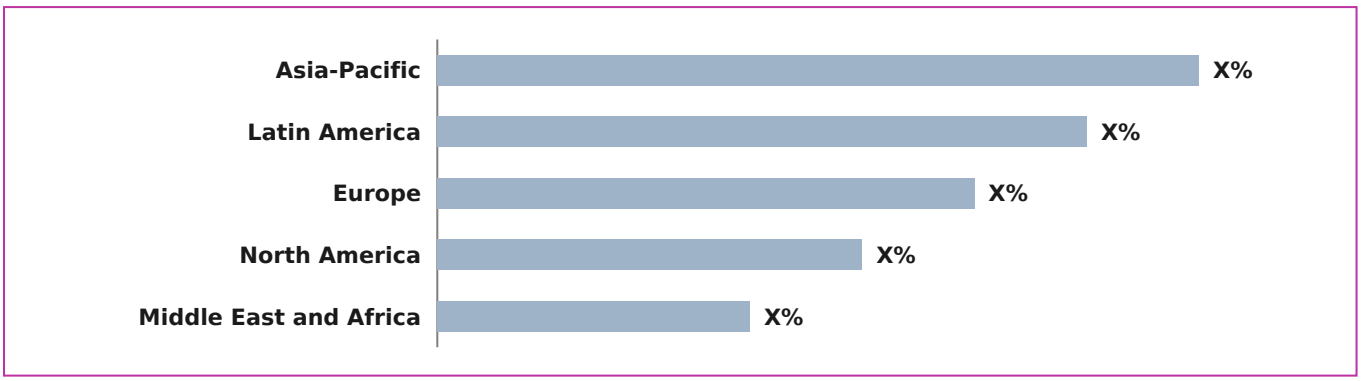
Muriate of Potash Market Regional Analysis and Country Outlook

Asia-Pacific accounted for XX% of global MOP value in 2025. China combines substantial domestic production with imports, while India remains heavily import-dependent and responsive to nutrient-based subsidy settings, rupee movements and government inventory management. Indonesia and Malaysia add plantation demand from oil palm, while Vietnam, Thailand and other Southeast Asian markets expand potassium use across rice, fruit, vegetables, cassava and sugar crops.

Latin America is forecast to grow at XX% annually through 2031, led by Brazil. Brazil's large nutrient deficit, limited domestic potash production and expanding soybean-corn rotation make it the world's most strategically important incremental import market; Russia supplied XX% and Canada XX% of Brazilian potash import value in 2025. Argentina and Paraguay add growth from commercial grain and oilseed production, while port and inland storage investment improves seasonal availability.

North America remains both a major production hub and a mature consumption market. Canada's Saskatchewan mines anchor global export availability, and BHP's Jansen Stage 1 will add XXX tonnes of annual capacity after ramp-up. Europe grows more slowly as nutrient-efficiency rules and geopolitical constraints shape procurement, while the Middle East and Africa advance from a smaller base through irrigated agriculture, food-security programs and improving fertilizer distribution.

Growth rate by region, 2025-2031



Source: XXX

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Market value by region, USD bn

Region	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
North America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

Market value by leading country, USD bn

Country	2025	2031	Share 2025	CAGR
United States	XXX	XXX	XXX	XXX
Germany	XXX	XXX	XXX	XXX
United Kingdom	XXX	XXX	XXX	XXX
Belgium	XXX	XXX	XXX	XXX
Netherlands	XXX	XXX	XXX	XXX
Japan	XXX	XXX	XXX	XXX
China	XXX	XXX	XXX	XXX
Mexico	XXX	XXX	XXX	XXX

Source: XXX

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Muriate of Potash Market Competitive Landscape and Company Share

The MOP supply base is highly concentrated because commercially viable deposits, mine-development capital and export logistics create formidable barriers to entry. Nutrien, Uralkali, Belaruskali, The Mosaic Company, EuroChem, K+S, ICL Group and Arab Potash Company constitute the principal established producers, with Canadian offshore supply marketed extensively through Canpotex. Competition is based on delivered cost, granular-product availability, logistics reliability, customer credit and participation in major-country contract settlements.

Nutrien remains the largest single producer in the competitive set, reporting XXX tonnes of potash production and XXX tonnes of sales in 2025. Mosaic produced XXX tonnes and operated XXX tonnes of North American annual operational capacity. Russian and Belarusian producers retain material low-cost capacity and increasingly orient volumes toward China, India, Brazil and other accessible markets.

The next competitive phase centers on new low-cost supply and logistics control. BHP's Jansen project is scheduled to begin production in mid-2027 and reach XXX tonnes per year after both stages ramp up, while expansions in Russia and Laos broaden supply options. Established producers are responding through mine automation, secondary mining, energy-efficiency projects, product-quality upgrades and tighter integration with rail, port and inland distribution assets.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
Nutrien Ltd.	XXX	XXX	XXX	XXX
The Mosaic Company	XXX	XXX	XXX	XXX
Uralkali PJSC	XXX	XXX	XXX	XXX
Belaruskali OJSC	XXX	XXX	XXX	XXX
EuroChem Group AG	XXX	XXX	XXX	XXX
K+S Aktiengesellschaft	XXX	XXX	XXX	XXX
ICL Group Ltd.	XXX	XXX	XXX	XXX
Arab Potash Company	XXX	XXX	XXX	XXX
BHP Group Limited	XXX	XXX	XXX	XXX
Intrepid Potash, Inc.	XXX	XXX	XXX	XXX

Source: XXX

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Muriate of Potash Market Forecast and Investment Opportunities

The MOP market will expand from USD XXX billion in 2025 to USD XXX billion in 2031 as global product demand moves beyond XXX tonnes. Volume growth will remain steadier than value growth because benchmark prices respond sharply to production outages, contract settlements, crop economics, inventories and exchange rates. Brazil, Southeast Asia and selected African markets contribute a rising share of incremental demand.

The supply balance will loosen after 2027 as Jansen Stage 1 enters the market and projects in Russia and Laos ramp up. The base-case forecast assumes disciplined commissioning, continued access to Russian and Belarusian tonnes in non-restricting markets and periodic inventory corrections rather than a sustained surplus. Delays at major projects would maintain a tighter balance and strengthen producer pricing power.

Commercial winners will be suppliers and distributors that minimize delivered cost while protecting availability during condensed planting windows. Granular-product flexibility, low-dust handling, dual-rail or multi-port routing, regional warehouses, working-capital support and agronomic evidence will carry greater value than nameplate capacity alone. Low-carbon production and auditable product footprints will become increasingly relevant in European procurement and global food-company supply chains.

Opportunities

- Granular and low-dust products for precision spreading
- Bulk-blending partnerships in Brazil, India and Southeast Asia
- Digital agronomy linked to soil potassium recommendations
- Lower-carbon solution mining and energy-efficient crystallization
- Port, rail and warehouse investments that reduce delivered costs
- Industrial-grade potassium chloride for water treatment and chemical processing

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