

Global Superphosphate 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 7.1 bn
Forecast (2031)	USD 9.6 bn
CAGR (2021-2031)	5.1%
Study period	2021-2031
Largest region	Asia-Pacific · 43.8%
Fastest-growing region	Latin America · 6.3%
Market concentration	Moderate
Licence	Individual / Company

The global superphosphate market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Single superphosphate remains the largest product category, supported by its phosphorus, sulphur and calcium content and its strong position in India, Brazil and other sulphur-deficient cropping systems. Asia-Pacific accounts for XX% of market value, while Latin America is the fastest-growing region at XX% CAGR as soybean, maize, sugarcane and pasture producers intensify phosphorus application. Feedstock integration, sulphur costs, phosphate-rock quality and national fertilizer-support policies will determine producer margins and regional competitiveness through 2031.

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Executive summary

The global superphosphate market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a CAGR of XX%. Single superphosphate remains the largest product category, supported by its phosphorus, sulphur and calcium content and its strong position in India, Brazil and other sulphur-deficient cropping systems. Asia-Pacific accounts for XX% of market value, while Latin America is the fastest-growing region at XX% CAGR as soybean, maize, sugarcane and pasture producers intensify phosphorus application. Feedstock integration, sulphur costs, phosphate-rock quality and national fertilizer-support policies will determine producer margins and regional competitiveness through 2031.

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

Key findings

- The global superphosphate market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Single superphosphate represented XX% of 2025 market value, sustained by its agronomic delivery of phosphorus, sulphur and calcium.
- Asia-Pacific held XX% of global revenue in 2025, with India constituting the region's largest commercially traded SSP market.
- Latin America will expand at XX% CAGR through 2031, led by phosphorus-intensive soybean, maize, sugarcane and pasture systems in Brazil.
- Granulated superphosphate accounted for XX% of market value in 2025 because of superior handling, blending compatibility and application uniformity.
- Oilseeds and pulses formed the largest crop-use segment at XX%, reflecting the combined requirement for plant-available phosphorus and sulphur.
- Global agricultural use of phosphorus fertilizers stood at XXX tonnes of P2O5 nutrient in 2024, according to FAOSTAT.
- World phosphate-rock mine production reached approximately XXX tonnes in 2024, according to the U.S. Geological Survey.

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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 Superphosphate Market Trends and Growth Drivers

Superphosphate demand sits at the intersection of crop economics, soil chemistry and industrial feedstock availability. Phosphorus has no substitute in crop nutrition, but farmers can choose among SSP, TSP, DAP, MAP and compound NPK products; the winning product in each market is determined by delivered nutrient cost, sulphur requirements, subsidy treatment and local distribution.

SSP is structurally strongest where sulphur-deficient soils, oilseed and pulse rotations, domestic rock conversion and short inland delivery distances reinforce one another. TSP performs best where users value concentrated phosphorus, low nitrogen application and lower freight per unit of P2O5.

The forecast is shaped by a widening gap between integrated and non-integrated producers. Companies controlling rock, acid, utilities and logistics can maintain throughput through commodity cycles, while standalone converters must differentiate through granulation, fortified grades, procurement discipline and dense dealer networks.

Growth drivers

Oilseed and pulse acreage expansion

Soybean, rapeseed, groundnut, sunflower and pulse systems require dependable phosphorus establishment and frequently benefit from sulphur supplied by SSP. Acreage growth and yield-intensification programs therefore expand both baseline fertilizer demand and the addressable market for fortified superphosphate grades.

Phosphorus-plus-sulphur agronomic proposition

SSP supplies readily available phosphate together with calcium and approximately XX%-XX% sulphur, creating a strong nutrient-economics case on sulphur-deficient soils. The proposition is particularly valuable for oilseeds, pulses, sugarcane and forage crops where sulphur response improves both yield and crop quality.

Domestic fertilizer security policies

Governments are prioritizing domestic fertilizer conversion capacity, diversified feedstock sourcing and lower import dependence. India's nutrient-based subsidy framework and Brazil's National Fertilizer Plan strengthen the commercial case for locally produced straight phosphates and regional processing assets.

Granulation and mechanized application

Granulated products reduce dust, improve storage and provide more uniform placement through modern spreaders. Investments in granulation also allow SSP and TSP to enter bulk blends and higher-value distribution channels that reject inconsistent powdered material.

Latin American nutrient intensification

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Acidic, phosphorus-fixing soils and expanding commercial crop production sustain high phosphate requirements in Brazil and neighboring markets. Local SSP production also benefits from demand for sulphur and from shorter inland supply chains than imported concentrated fertilizers in selected crop belts.

Fortified SSP product development

Zincated, boronated and crop-specific SSP grades convert a commodity input into a differentiated soil-nutrition product. These formulations support higher realization, improve dealer engagement and align with increasingly detailed soil-test recommendations.

Restraints

Sulphur and phosphate-rock cost volatility

SSP economics are highly exposed to delivered sulphuric-acid and phosphate-rock costs, while TSP margins depend on phosphoric-acid conversion economics. Rapid feedstock inflation compresses non-integrated producers first and can trigger temporary curtailments when regulated or seasonally fixed selling prices lag input costs.

Competition from concentrated phosphates

DAP, MAP and TSP contain more P2O5 per tonne than SSP, lowering freight, storage and handling costs per unit of phosphorus. Concentrated products gain share over long inland routes and in high-throughput commercial farming systems unless SSP's sulphur value offsets the logistics disadvantage.

Contaminant and by-product compliance

Cadmium limits, fluorine controls, dust management and phosphogypsum storage requirements raise capital and operating costs. Producers using higher-contaminant rock face narrower export options and greater expenditure on blending, beneficiation and quality assurance.

Lower nutrient density of SSP

SSP generally contains XX%-XX% available P2O5, requiring more physical tonnes than TSP, MAP or DAP to deliver equivalent phosphorus. The resulting freight and field-application burden limits penetration in import-dependent markets distant from production centers.

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Superphosphate Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Oilseed and pulse acreage expansion	XXX	XXX	XXX
Phosphorus-plus-sulphur agronomic proposition	XXX	XXX	XXX
Domestic fertilizer security policies	XXX	XXX	XXX
Granulation and mechanized application	XXX	XXX	XXX
Latin American nutrient intensification	XXX	XXX	XXX
Fortified SSP product development	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Sulphur and phosphate-rock cost volatility	XXX	XXX	XXX
Competition from concentrated phosphates	XXX	XXX	XXX
Contaminant and by-product compliance	XXX	XXX	XXX
Lower nutrient density of SSP	XXX	XXX	XXX

Source: XXX

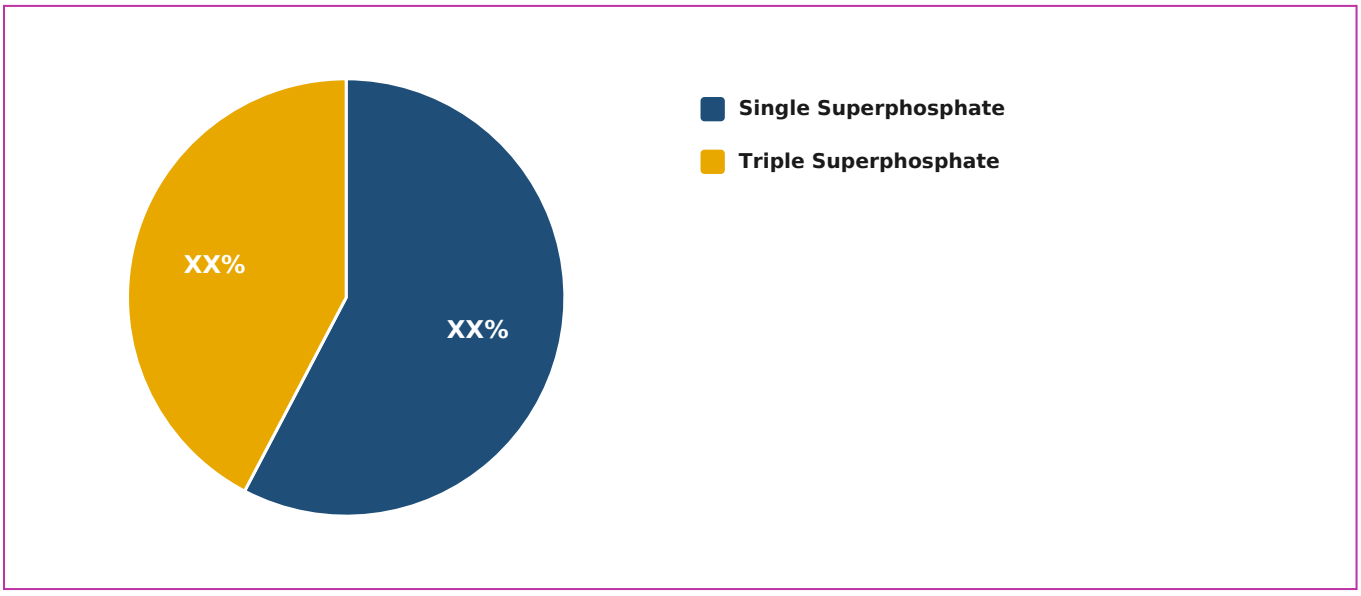
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Superphosphate Market Segmentation by Product, Form, Crop and Channel

By Product Type

SSP leads because it combines phosphorus with sulphur and calcium, uses a comparatively direct sulphuric-acid process and benefits from established domestic distribution in India and Brazil. TSP commands a higher value per tonne and gains where transport economics, concentrated phosphorus and bulk blending are decisive. Fortified SSP is the fastest-growing niche within the SSP family as zinc, boron and crop-specific formulations raise agronomic and commercial value.

Value share by product Type, 2025



Source: XXX

Value by product Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Single Superphosphate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Triple Superphosphate	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

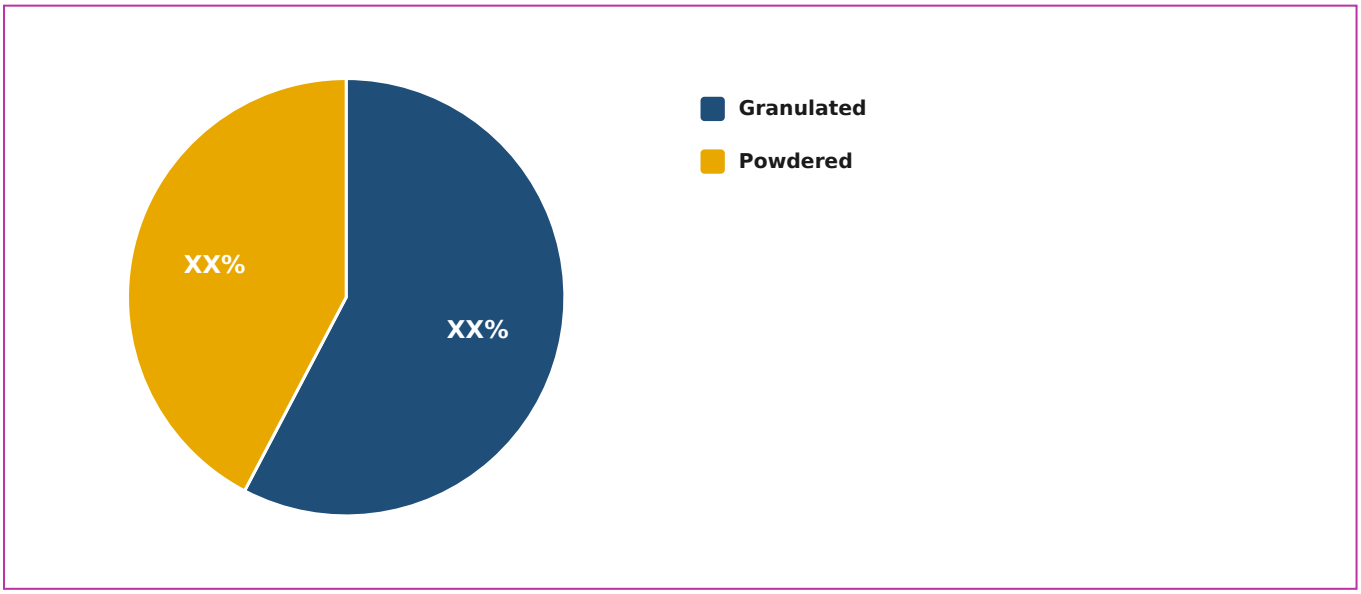
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By Form

Granulated material leads because it flows consistently through mechanized spreaders, stores with less caking and dust, and integrates efficiently into bulk blends. Powdered SSP remains important among price-sensitive farmers and in markets with established manual or localized application practices. Investment is shifting toward granulation lines as producers seek higher realization and broader geographic distribution.

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Value share by form, 2025



Source: XXX

Value by form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Granulated	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Powdered	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Crop Application

Oilseeds and pulses lead because their yield and quality respond to both phosphorus and sulphur, making SSP particularly competitive. Cereals represent a broad volume base, although DAP, MAP and compound NPK products exert stronger substitution pressure. Fruits and vegetables grow fastest as intensive cultivation, fertigation complements and higher-value crop economics support balanced and micronutrient-fortified programs.

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Value by crop Application, USD bn

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

Source: XXX

By Distribution Channel

Dealer and cooperative networks dominate because superphosphate purchasing is seasonal, locally advised and frequently linked to credit, subsidy documentation and last-mile delivery. Direct sales are gaining among plantations, large farms, fertilizer blenders and procurement cooperatives able to contract full truck or vessel parcels. Digital platforms remain a small but expanding lead-generation and repeat-order channel rather than a standalone logistics model.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Dealers and Retail Distributors	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Cooperatives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct Institutional Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Digital and Other Channels	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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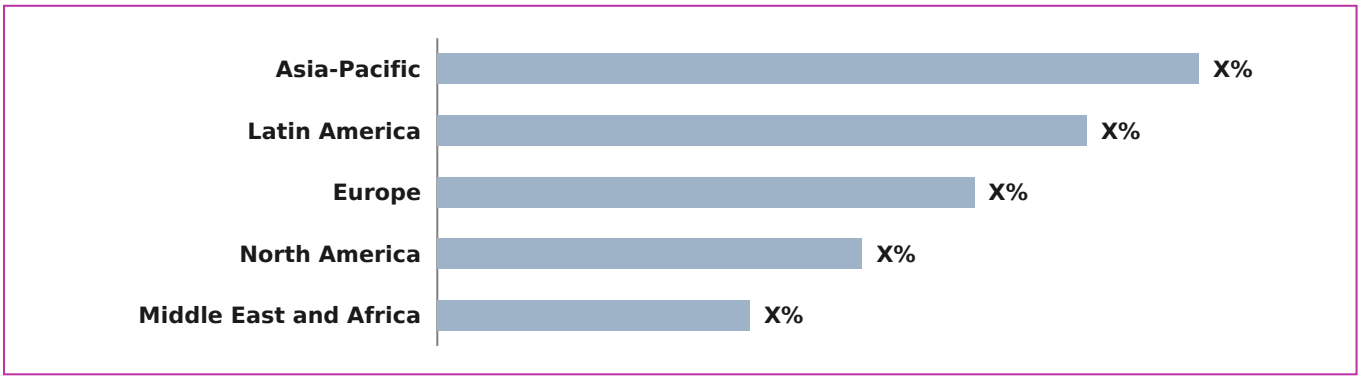
Superphosphate Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global superphosphate revenue in 2025. India anchors regional SSP demand through a large domestic manufacturing base, nutrient-based fertilizer support and extensive use on oilseeds, pulses, sugarcane and horticultural crops. China remains influential through phosphate-rock mining, fertilizer conversion capacity and trade-policy decisions, while Vietnam and Australia provide additional demand for straight phosphates in rice, plantation, pasture and broadacre systems.

Latin America is the fastest-growing region at XX% CAGR through 2031. Brazil combines high phosphate requirements, extensive soybean and maize production, sulphur-responsive soils and established domestic SSP capacity, although dependence on imported fertilizer nutrients and feedstocks keeps pricing sensitive to exchange rates and ocean freight. Argentina and Paraguay add growth through soybean, maize, wheat and pasture intensification.

Europe and North America are mature but strategically important markets for TSP, low-cadmium products and precision nutrient management. The Middle East and Africa hold the strongest longer-term white-space opportunity: Morocco, Tunisia, Egypt and South Africa provide production platforms, while population growth, yield gaps and fertilizer-security programs support downstream demand across sub-Saharan Africa.

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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Superphosphate Market Competitive Landscape and Company Share

The market is moderately concentrated at the integrated-feedstock level and fragmented in downstream SSP conversion. OCP Group, The Mosaic Company, PhosAgro, ICL Group, EuroChem and Ma'aden control substantial phosphate-rock, phosphoric-acid or finished-phosphate positions, while Indian and Brazilian SSP markets include numerous regional converters competing on dealer reach, subsidy execution, granulation quality and crop-specific formulations.

Vertical integration is the primary structural advantage. Captive rock, sulphuric acid, phosphoric acid, power, rail and port assets reduce exposure to spot feedstocks and permit product switching across SSP, TSP, MAP, DAP and compound fertilizers. Coromandel International, Paradeep Phosphates and other Indian producers are investing in upstream intermediates and granulation, while OCP and Ma'aden are expanding broader phosphate-nutrition platforms.

Competitive strategy is shifting from undifferentiated tonnes toward low-cadmium sourcing, fortified SSP, reliable granule strength, agronomy services and lower-carbon production. Capacity curtailments triggered by sulphur inflation demonstrate that operating flexibility and disciplined feedstock procurement can matter as much as nameplate capacity.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
OCP Group	XXX	XXX	XXX	XXX
The Mosaic Company	XXX	XXX	XXX	XXX
PhosAgro	XXX	XXX	XXX	XXX
ICL Group	XXX	XXX	XXX	XXX
EuroChem Group	XXX	XXX	XXX	XXX
Ma'aden	XXX	XXX	XXX	XXX
Coromandel International Limited	XXX	XXX	XXX	XXX
Paradeep Phosphates Limited	XXX	XXX	XXX	XXX
Rama Phosphates Limited	XXX	XXX	XXX	XXX
Gujarat State Fertilizers & Chemicals Limited	XXX	XXX	XXX	XXX
Foskor	XXX	XXX	XXX	XXX
Jordan Phosphate Mines Company	XXX	XXX	XXX	XXX

Source: XXX

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Superphosphate Market Forecast and Investment Opportunities

Global demand will advance from USD XXX billion in 2025 to USD XXX billion in 2031. Volume growth will be concentrated in India, Brazil, Southeast Asia and selected African markets, while value growth will also reflect granulation premiums, micronutrient fortification and the cost of meeting tighter contaminant and emissions standards.

The central forecast assumes steady crop prices, continued phosphorus application growth in emerging markets, normalization of sulphur availability after periodic tightness and progressive commissioning of phosphate capacity. A high-growth scenario emerges if fertilizer-security incentives accelerate domestic plants and oilseed economics remain strong; a downside scenario centers on prolonged sulphur inflation, weak farmer affordability and aggressive substitution by DAP or NPK complexes.

Winning suppliers will combine feedstock integration with local route-to-market strength. Assets located near phosphate rock, sulphuric-acid supply, ports and high-consumption crop belts will capture the strongest returns, particularly when paired with granulation, fortified grades, soil-testing support and auditable low-cadmium specifications.

Opportunities

- Low-cadmium superphosphate for regulated and premium markets
- Micronutrient-fortified SSP for oilseeds, pulses and horticulture
- Regional granulation plants close to phosphate-rock deposits and crop belts
- Phosphogypsum valorization and circular-process improvements
- Digitally targeted phosphorus recommendations linked to soil testing
- Import-substitution capacity in India, Brazil and sub-Saharan Africa

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