

Global Triple Superphosphate (TSP) 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

This demo shows the **form and depth** of the report — real narrative with the detailed figures and tables masked as “XXX”. When you order the report, every figure is finalised and verified for your copy, and the full report is delivered within 24–72 hours.

Indicator	Value
Market size (2025)	USD 3.4 bn
Forecast (2031)	USD 4.4 bn
CAGR (2021-2031)	4.8%
Study period	2021-2031
Largest region	Latin America · 31.8%
Fastest-growing region	Middle East and Africa · 6.1%
Market concentration	Moderate
Licence	Individual / Company

The global Triple Superphosphate (TSP) market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is strengthening as growers, distributors and public procurement programmes prioritize concentrated, nitrogen-free phosphorus for basal application and customized nutrient blends. Latin America accounted for XX% of 2025 market value, supported by Brazil's large phosphate deficit and intensive soybean, maize and sugarcane production. OCP Nutricrops' rapid TSP capacity expansion is reshaping global supply, trade routes and producer economics through the forecast period.

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Executive summary

The global Triple Superphosphate (TSP) market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Demand is strengthening as growers, distributors and public procurement programmes prioritize concentrated, nitrogen-free phosphorus for basal application and customized nutrient blends. Latin America accounted for XX% of 2025 market value, supported by Brazil's large phosphate deficit and intensive soybean, maize and sugarcane production. OCP Nutricrops' rapid TSP capacity expansion is reshaping global supply, trade routes and producer economics through the forecast period.

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

Key findings

- The global TSP market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global TSP production reached approximately XXX tonnes of P2O5 nutrient in 2024, equivalent to about XXX tonnes of finished product, according to EuroChem's Annual Review 2024.
- Morocco produced XXX tonnes of TSP in 2024, up from XXX tonnes in 2023, according to the U.S. Geological Survey's Morocco minerals data.
- OCP Nutricrops exceeded XXX tonnes of installed TSP capacity in July 2025 and targeted more than XXX tonnes by the end of 2025.
- Latin America held XX% of global market value in 2025, reflecting Brazil's import dependence and high phosphorus requirements across soybean, maize, sugarcane and pasture systems.
- Granular TSP represented XX% of 2025 market value because of its handling efficiency, blend compatibility and lower dust generation.
- Direct soil application accounted for XX% of demand, while bulk blending and compound-fertilizer manufacture represented XX%.
- Morocco held XXX tonnes of phosphate-rock reserves in 2025, approximately XX% of the global total reported by 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 Triple Superphosphate Market Trends and Growth Drivers

TSP occupies a distinct position in the phosphate complex: it provides roughly XX% P2O5 without tying the buyer to an ammonia-derived nitrogen component. That chemistry makes TSP strategically valuable to bulk blenders, legume producers and markets seeking to optimize phosphorus independently from nitrogen, while its high nutrient density reduces transport and storage requirements per unit of phosphorus.

Supply economics are highly integrated. Competitive producers control or secure phosphate rock, phosphoric acid, sulfur, utilities, granulation assets and deep-water export logistics. Morocco's resource base and OCP Nutricrops' TSP Hub therefore influence the global cost curve, while Brazil, China, Tunisia, Egypt and Israel remain important production or consumption nodes.

The market's growth path will be shaped by two simultaneous shifts: wider access to standard granular TSP and rising differentiation through low-cadmium, sulfur-enhanced and micronutrient-containing grades. Producers that pair reliable physical supply with localized agronomy and distributor inventory programmes will capture a disproportionate share of incremental value.

Growth drivers

Latin American row-crop intensification

Brazilian soybean, second-crop maize, sugarcane and pasture systems require sustained phosphorus replacement, while domestic phosphate supply remains below agricultural demand. Importers favor concentrated products that reduce freight and handling per unit of P2O5, giving granular TSP a strong position in inland blending networks.

Independent phosphorus formulation

TSP supplies concentrated phosphorus without adding nitrogen, allowing agronomists and blenders to set nitrogen rates independently. This flexibility becomes particularly valuable when ammonia-linked fertilizers are expensive or when legumes and manure-supported systems require phosphorus but limited additional nitrogen.

Moroccan capacity expansion

OCP Nutricrops' TSP Hub materially expands export-capable supply and supports more flexible production of customized grades. Greater availability improves market development in regions previously constrained by inconsistent TSP supply and strengthens the product's role relative to MAP and DAP.

Bulk-blending network growth

Investments in port warehouses, regional blending plants and precision formulation increase demand for straight nutrient carriers. Granular TSP is compatible with potash, urea and micronutrient components and enables distributors to produce crop- and soil-specific blends close to the point of use.

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Soil-phosphorus replenishment

Nutrient mining and low historic fertilizer application have depleted plant-available phosphorus across parts of Sub-Saharan Africa and South Asia. Soil-testing programmes, extension services and public fertilizer initiatives are moving purchasing toward balanced nutrient packages that include higher phosphorus rates.

Enhanced TSP formulations

Sulfur, zinc, boron and efficiency additives allow producers to move beyond commodity 0-46-0 and address multiple nutrient constraints in one granule. These products command stronger margins and improve distributor differentiation in oilseed, cereal and horticultural markets.

Restraints

Feedstock and energy volatility

TSP economics are exposed to phosphate-rock quality, phosphoric-acid conversion costs, sulfur prices and energy-intensive mining and beneficiation. Abrupt input inflation raises working-capital requirements and can delay distributor procurement when farm-gate crop prices do not adjust at the same pace.

MAP and DAP substitution

MAP and DAP remain deeply embedded in global trading, blending and farmer-use systems and supply both nitrogen and phosphorus in one product. When ammonia economics are favorable or procurement programmes specify ammoniated phosphates, TSP loses relative demand despite its higher phosphorus concentration.

Cadmium compliance costs

European and national contaminant limits increase the value of low-cadmium rock and require tighter testing, traceability and segregation. Producers processing higher-cadmium ore face narrower market access or additional purification and blending costs.

Trade and logistics friction

Export controls, duties, Red Sea disruption, port congestion and restricted trade finance can separate production centers from seasonal demand windows. Import-dependent markets then carry larger safety stocks or shift purchases toward locally available phosphate alternatives.

Farmer affordability constraints

Smallholders reduce or defer phosphorus application when fertilizer-to-crop price ratios deteriorate because the immediate yield response can be less visible than for nitrogen. Credit constraints are most restrictive in South Asia and Sub-Saharan Africa, where subsidy timing and dealer liquidity strongly influence demand.

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Triple Superphosphate Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Latin American row-crop intensification	XXX	XXX	XXX
Independent phosphorus formulation	XXX	XXX	XXX
Moroccan capacity expansion	XXX	XXX	XXX
Bulk-blending network growth	XXX	XXX	XXX
Soil-phosphorus replenishment	XXX	XXX	XXX
Enhanced TSP formulations	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Feedstock and energy volatility	XXX	XXX	XXX
MAP and DAP substitution	XXX	XXX	XXX
Cadmium compliance costs	XXX	XXX	XXX
Trade and logistics friction	XXX	XXX	XXX
Farmer affordability constraints	XXX	XXX	XXX

Source: XXX

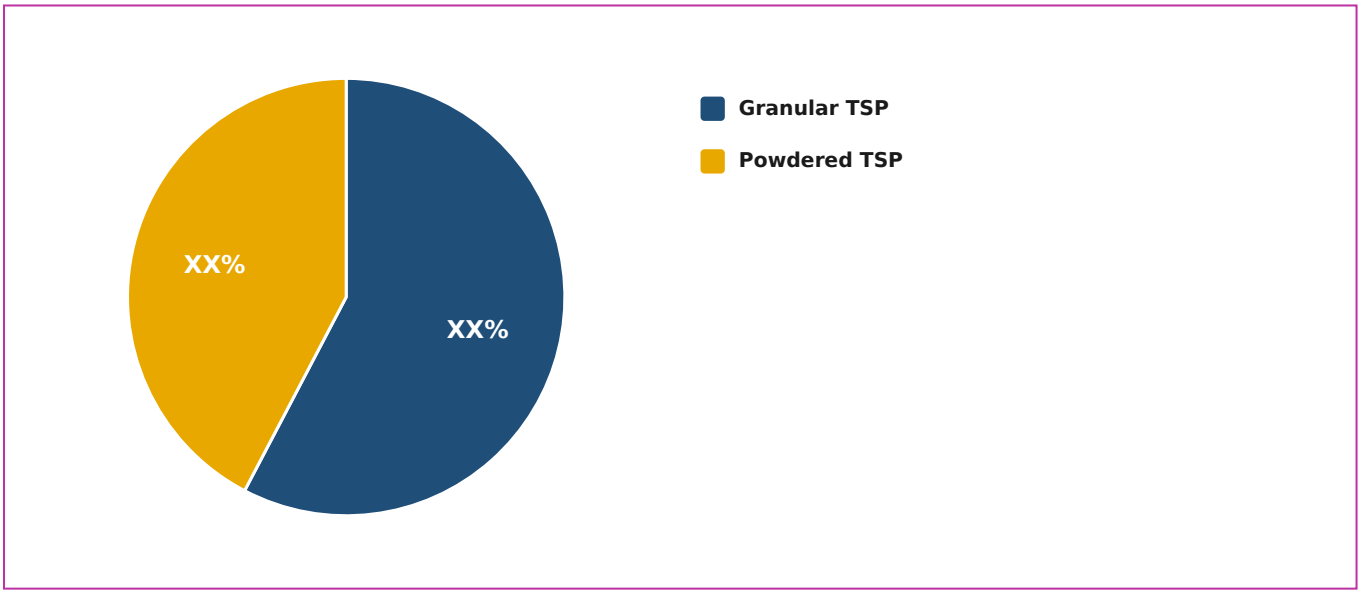
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Triple Superphosphate Market Segmentation Analysis

By Physical Form

Granular material dominates international trade because it flows efficiently through ports, warehouses, spreaders and bulk-blending plants while generating less dust than powdered product. Consistent granule size also reduces segregation when TSP is blended with urea, potash and micronutrients. Powdered TSP remains relevant for localized compound-fertilizer manufacture and markets with simpler application systems.

Value share by physical Form, 2025



Source: XXX

Value by physical Form, USD bn

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

Source: XXX

By Product Grade

Standard TSP remains the market's benchmark because procurement and blending specifications are organized around its concentrated phosphorus guarantee. Enhanced formulations combine TSP with sulfur, zinc, boron, coatings or efficiency additives and achieve stronger margins in nutrient-deficient soils. Low-cadmium positioning is also becoming a product-grade differentiator in Europe and premium food supply chains.

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Value by product Grade, USD bn

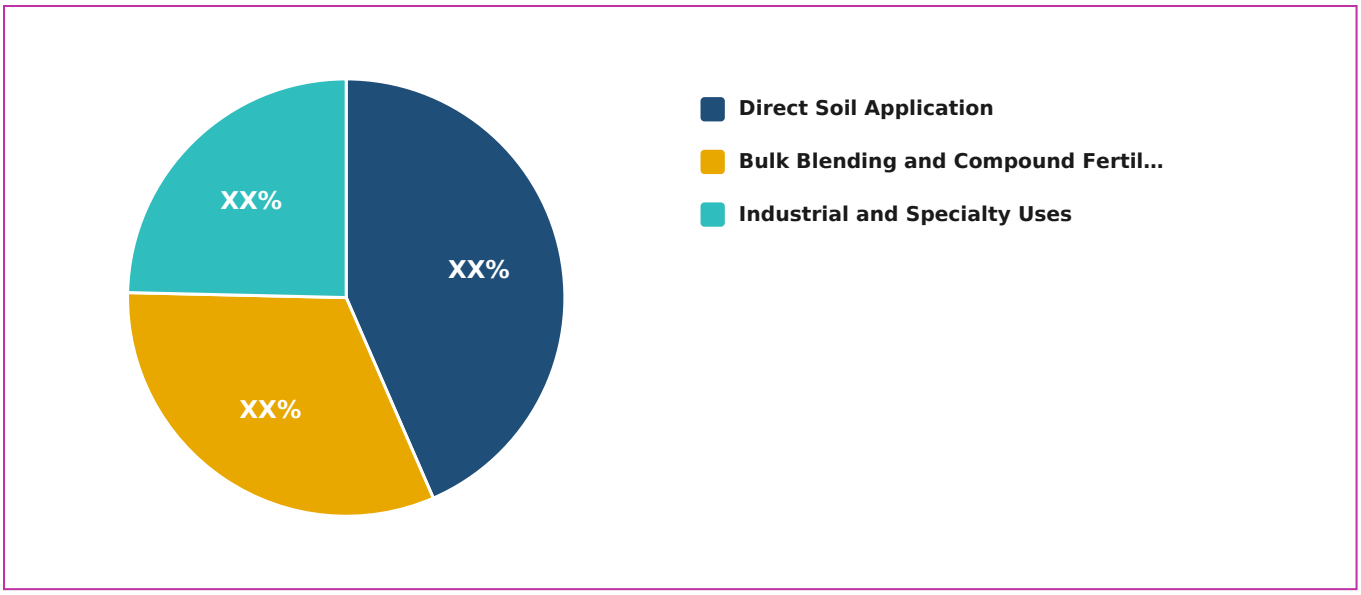
Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Standard TSP	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Enhanced and Specialty TSP	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Application

Direct application leads because TSP supplies a concentrated basal phosphorus dose without additional nitrogen and is compatible with mechanized broadcasting and band placement. Bulk blending is expanding faster as distributors install regional plants and formulate nutrients around crop, yield and soil-test requirements. Industrial and specialty use includes horticultural formulations, customized compounds and other controlled manufacturing applications.

Value share by application, 2025



Source: XXX

Value by application, USD bn

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

Source: XXX

By Crop Type

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Cereals lead through the scale of maize, wheat and rice cultivation and the role of phosphorus in establishment and root development. Oilseeds and pulses are particularly important in Brazil and South Asia, where TSP allows phosphorus application without unnecessary nitrogen on legumes. Fruits and vegetables grow fastest as commercial growers adopt soil testing, fertigation complements and higher-value nutrient programmes.

Value by crop Type, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Cereals	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 Fiber Crops	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Crops and Pasture	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Sales Channel

Distributors lead because they finance inventories, manage inland logistics and translate bulk imports into regional farmer sales. Direct sales are concentrated among large farms, plantations and fertilizer blenders with sufficient storage and procurement scale. Government agencies and cooperatives remain influential in subsidized South Asian and African markets, creating large but tender-driven purchasing cycles.

Value by sales Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Agricultural Distributors and Retailers	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Direct Sales to Farms and Blenders	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Government Agencies and Cooperatives	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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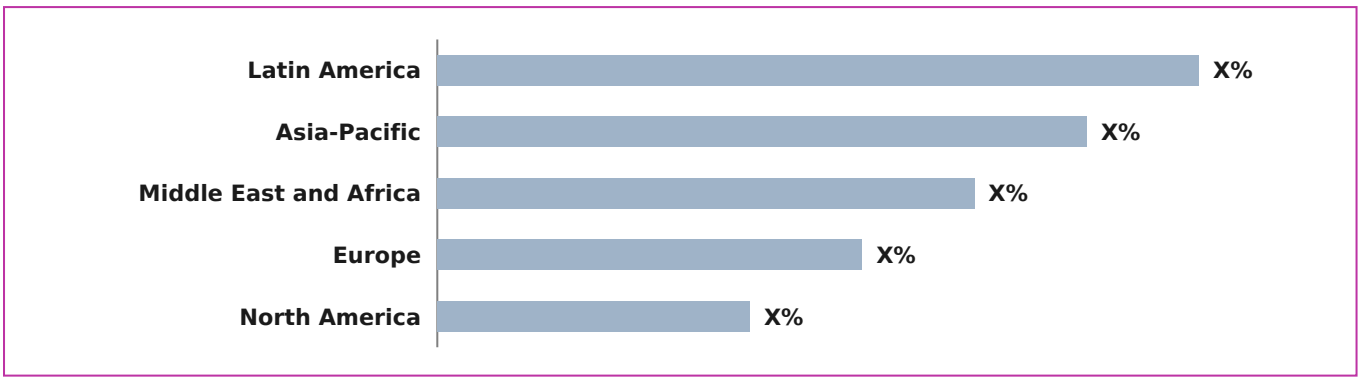
Triple Superphosphate Market Regional Analysis and Country Outlook

Latin America generated XX% of global TSP market value in 2025. Brazil anchors regional demand through its large soybean, maize, sugarcane and pasture acreage, extensive bulk-blending infrastructure and structural reliance on imported phosphate nutrients. Argentina, Paraguay and Colombia provide additional demand, while exchange rates, farmer barter arrangements and port-to-interior freight spreads determine purchasing timing.

Asia-Pacific represented XX% of the market, with demand distributed across China, Indonesia, Bangladesh, Pakistan, Vietnam, India and other fertilizer-support markets. Regional growth is driven by rice, maize, oil palm, horticulture and compound-fertilizer production, although TSP competes directly with subsidized DAP and domestic SSP. Pakistan's introduction of OCP-sourced Engro TSP demonstrates the opportunity for high-analysis phosphate products positioned around affordability per unit of phosphorus.

Middle East and Africa will be the fastest-growing region at a XX% CAGR through 2031. Morocco is both the dominant supply platform and a major capacity-growth center, while Egypt and Tunisia contribute established production. Demand expansion will center on African soil-fertility programmes, commercial horticulture and government-supported fertilizer distribution; Europe and North America will remain slower-growing but attractive for low-cadmium, traceable and enhanced products.

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
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Asia-Pacific	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Middle East and Africa	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

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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Triple Superphosphate Market Competitive Landscape and Company Share

The global TSP market is moderately concentrated at the production level and more fragmented in distribution. OCP Nutricrops has established the leading supply position following the TSP Hub ramp-up, while The Mosaic Company, ICL Group, Groupe Chimique Tunisien, Egyptian producers and Chinese suppliers retain important regional and export roles. Control of phosphate rock, phosphoric acid, sulfur sourcing and port infrastructure creates substantial barriers to new integrated capacity.

Competition is shifting from standard commodity tonnage toward formulation flexibility, contaminant profile, logistics reliability and agronomic support. OCP is using flexible production lines to customize grades, while Sulvaris and Shell Sulphur Solutions are advancing sulfur-enhanced phosphate technologies. Chinese suppliers serve South American, Southeast Asian and Middle Eastern markets, and Brazilian producers benefit from proximity to the world's largest regional demand pool.

Capacity additions will increase buyer choice but will also intensify pressure on standalone plants lacking captive rock or acid. Strategic priorities through 2031 include low-cadmium ore access, debottlenecking, renewable-energy integration, product enhancement and distributor partnerships in Brazil, Africa and South Asia. Consolidation is most likely among regional distributors and non-integrated processors rather than among state-linked resource owners.

Leading companies

Company	HQ	Est. revenue 2025	Market share 2025	YoY
OCP Nutricrops	XXX	XXX	XXX	XXX
The Mosaic Company	XXX	XXX	XXX	XXX
ICL Group	XXX	XXX	XXX	XXX
EuroChem Group	XXX	XXX	XXX	XXX
Groupe Chimique Tunisien	XXX	XXX	XXX	XXX
El Nasr Company for Intermediate Chemicals	XXX	XXX	XXX	XXX
Kunming Chuan Jin Nuo Chemical Co., Ltd.	XXX	XXX	XXX	XXX
Guizhou Phosphate Chemical Group	XXX	XXX	XXX	XXX
Agropolychim AD	XXX	XXX	XXX	XXX
Grupo Fertinal	XXX	XXX	XXX	XXX

Source: XXX

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Triple Superphosphate Market Forecast and Commercial Opportunities

Global market value will rise from USD XXX billion in 2025 to USD XXX billion in 2031, with underlying volume growth supported by row-crop intensification, balanced fertilization and improved product availability. Price cycles will remain pronounced, but the expansion of Moroccan output will deepen merchant liquidity and enable TSP to win applications where DAP or MAP previously dominated because of availability.

The strongest commercial opportunities lie in granular TSP for Latin American blending, crop-specific grades for African soil-restoration programmes and low-cadmium products for regulated European channels. Enhanced grades containing sulfur or micronutrients will grow at XX% annually, outpacing standard TSP as distributors seek higher-margin products with a clearer agronomic proposition.

Successful suppliers will combine feedstock integration with flexible granulation, rigorous contaminant control and regional inventory. Digital traceability, soil-test-led recommendations and documented product carbon intensity will become increasingly relevant in premium channels. Under an accelerated crop-price and subsidy scenario, demand reaches the upper forecast range through higher application rates; under a weak affordability scenario, replacement demand remains concentrated in large commercial farms and public procurement.

Opportunities

- Sulfur- and micronutrient-enriched TSP granules
- Low-cadmium supply into Europe and premium food-crop systems
- Localized granulation using imported phosphoric acid or intermediate material
- Direct-to-grower agronomy platforms in Brazil, Pakistan and East Africa
- TSP-based bulk blends tailored to oilseeds, sugarcane and horticulture
- Lower-carbon production using renewable electricity, desalinated water and green process inputs

> This preview shows the form and depth of the report. The full report contains every figure, segment- and country-level detail and full company profiles. On purchase all figures are finalised and verified, and the report is delivered within 24–72 hours.

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