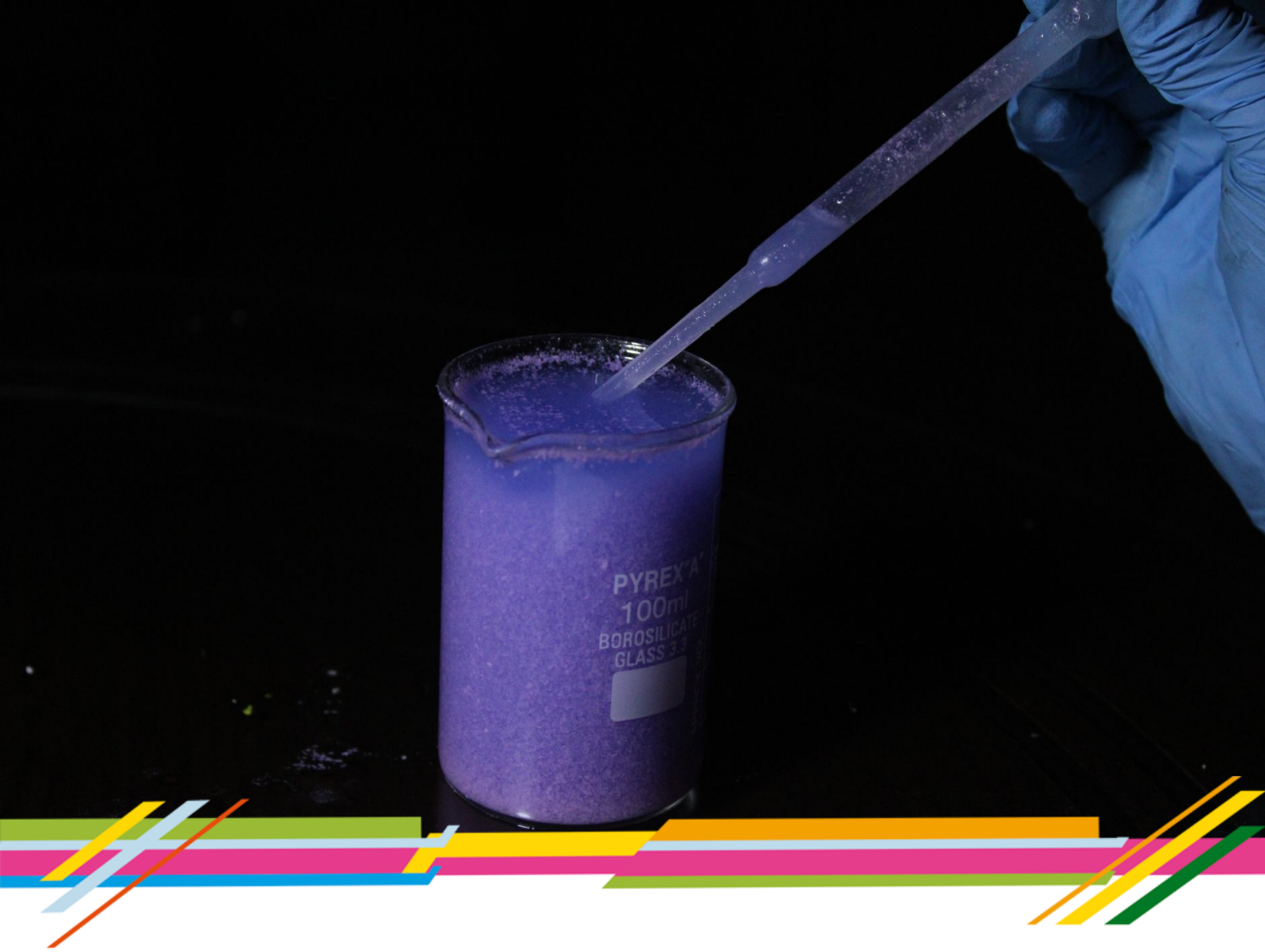



# Global Diammonium Phosphate (DAP) Market 2026

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 40.8 bn |
| Forecast (2031) | USD 53.9 bn |
| CAGR (2021-2031) | 4.8% |
| Study period | 2021-2031 |
| Largest region | Asia-Pacific · 48.6% |
| Fastest-growing region | Africa · 6.2% |
| Market concentration | Moderate |
| Licence | Individual / Company |

The global diammonium phosphate market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031, advancing at a XX% CAGR. Agricultural fertilizers represented XX% of market value, supported by DAP's concentrated 18-46-0 nutrient profile and its central role in cereal, oilseed and pulse production. Asia-Pacific accounted for XX% of demand, while Africa will record the fastest regional growth at XX% annually as fertilizer access, domestic blending and irrigated agriculture expand. Supply remains concentrated around integrated phosphate-rock, phosphoric-acid and ammonia platforms in Morocco, China, Saudi Arabia, the United States and Russia.

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# Executive summary

The global diammonium phosphate market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031, advancing at a XX% CAGR. Agricultural fertilizers represented XX% of market value, supported by DAP's concentrated 18-46-0 nutrient profile and its central role in cereal, oilseed and pulse production. Asia-Pacific accounted for XX% of demand, while Africa will record the fastest regional growth at XX% annually as fertilizer access, domestic blending and irrigated agriculture expand. Supply remains concentrated around integrated phosphate-rock, phosphoric-acid and ammonia platforms in Morocco, China, Saudi Arabia, the United States and Russia.

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

## Key findings

- The global DAP market reached USD XXX billion and XXX metric tonnes in 2025.
- Market value will increase to USD XXX billion by 2031, representing a XX% CAGR, while volume expands at XX% annually to XXX metric tonnes.
- Asia-Pacific generated XX% of 2025 market value, led by China and India.
- Granular DAP accounted for XX% of market value because it supports bulk handling, broadcasting, drilling and large-scale blending.
- Agricultural fertilizers represented XX% of demand; industrial applications accounted for the remaining XX%.
- Cereals and grains consumed XX% of agricultural DAP value, with wheat, maize and rice providing the largest application base.
- Africa will expand at a XX% CAGR through 2031, the fastest regional rate, as local processing, distribution infrastructure and commercial farming develop.
- The World Bank reported that benchmark DAP prices increased XX% during the first half of 2025 amid strong demand, trade restrictions and constrained supply.

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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 Diammonium Phosphate Market Trends and Growth Drivers

DAP sits at the intersection of food-security policy, extractive-resource economics and seasonal agricultural demand. Its 18-46-0 nutrient profile makes it one of the most concentrated and widely traded sources of plant-available phosphorus, but its economics depend on four tightly linked inputs: phosphate rock, phosphoric acid, ammonia and sulphur.

The merchant balance can change quickly because China, India, Morocco, Saudi Arabia, Russia and the United States play different production, consumption and trade roles. Chinese export administration, Indian tenders, North African operating rates and Middle Eastern capacity ramp-ups consequently transmit into benchmark prices and regional availability.

Long-term demand is supported by nutrient removal from soils and the need to raise yields, while the product mix is becoming more specialized. Suppliers are responding with flexible production, micronutrient fortification, low-cadmium feedstocks, digital agronomy and lower-carbon processing rather than relying exclusively on commodity-volume growth.

## Growth drivers

### Food output intensification

Population growth, changing diets and limited expansion of arable land require more crop output per hectare. DAP benefits because it supplies readily available phosphorus for early root development together with ammoniacal nitrogen, making it a foundational planting fertilizer for cereals, oilseeds and pulses.

### Soil phosphorus replacement

Repeated crop removal depletes plant-available phosphorus, particularly in high-intensity grain and oilseed systems. Soil-testing programs and yield-gap reduction strategies are increasing replacement applications in Brazil, India, China, Eastern Europe and parts of Africa.

### Indian subsidy-backed demand

India's Nutrient-Based Subsidy framework and DAP-specific support reduce the farm-gate impact of elevated import costs. Seasonal tenders from importers and cooperatives consequently remain a major source of global trade liquidity and can tighten prompt availability ahead of Kharif and Rabi planting.

### African fertilizer-access expansion

Port upgrades, inland warehouses, blending plants and dealer networks are lowering the cost of reaching African growers. Public input programs and commercial maize, wheat, cotton and horticulture production broaden the addressable market from a low application-rate base.

### Integrated capacity additions

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OCP and Ma'aden are developing large integrated platforms based on advantaged phosphate resources and export infrastructure. Additional phosphoric acid, ammonia and granulation capacity will improve product availability and support market development in Asia, Africa and Latin America.

### Specialty phosphate innovation

Water-soluble, low-heavy-metal, micronutrient-fortified and nano-DAP products improve nutrient-use efficiency or serve higher-value fertigation and foliar programs. These formats raise value per nutrient tonne and give suppliers entry points beyond undifferentiated bulk fertilizer.

## Restraints

### Feedstock and energy volatility

DAP economics are exposed to ammonia, sulphur, phosphate rock, natural gas and electricity costs. Sudden increases compress non-integrated producer margins and raise delivered prices, weakening application rates among price-sensitive farmers.

### Trade-policy disruption

Export quotas, customs inspections, sanctions, tariffs and shipping disruption can remove merchant tonnes with little notice. Buyers respond through precautionary inventories and alternative sourcing, increasing working-capital requirements and regional price dispersion.

### Farmer affordability pressure

The ratio between fertilizer prices and expected crop revenue determines whether growers maintain, defer or reduce phosphate applications. Low grain prices and restricted agricultural credit particularly constrain smallholders in South Asia, Africa and Latin America.

### Environmental compliance costs

Phosphogypsum storage, fluorine emissions, water consumption, mine rehabilitation and carbon regulation require sustained capital expenditure. Older assets and producers dependent on carbon-intensive ammonia face the greatest cost exposure.

### Product substitution

MAP, NPS, NPK complexes, SSP and customized soil-nutrition programs compete with DAP on agronomic fit and nutrient economics. The shift is strongest where growers need sulphur or potassium, where high soil pH favors alternative phosphate sources, or where policy promotes balanced fertilization.

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# DAP Market Driver and Restraint Impact on the Forecast

### Drivers — impact on forecast

| Driver | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Food output intensification | XXX | XXX | XXX |
| Soil phosphorus replacement | XXX | XXX | XXX |
| Indian subsidy-backed demand | XXX | XXX | XXX |
| African fertilizer-access expansion | XXX | XXX | XXX |
| Integrated capacity additions | XXX | XXX | XXX |
| Specialty phosphate innovation | XXX | XXX | XXX |

*Source: XXX*

### Restraints — impact on forecast

| Restraint | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Feedstock and energy volatility | XXX | XXX | XXX |
| Trade-policy disruption | XXX | XXX | XXX |
| Farmer affordability pressure | XXX | XXX | XXX |
| Environmental compliance costs | XXX | XXX | XXX |
| Product substitution | XXX | XXX | XXX |

*Source: XXX*

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# Diammonium Phosphate Market Segmentation by Grade, Form, Crop and Channel

## By Grade and End Use

Agricultural DAP dominates because the standard 18-46-0 grade delivers a high concentration of immediately available nitrogen and phosphorus with favorable storage and handling characteristics. Industrial DAP serves fire-retardant formulations, fermentation nutrients, metal treatment and technical chemical applications. Premium growth is concentrated in purified, low-contaminant grades requiring tighter control of feedstock and manufacturing conditions.

**Value by grade and End Use, USD bn**

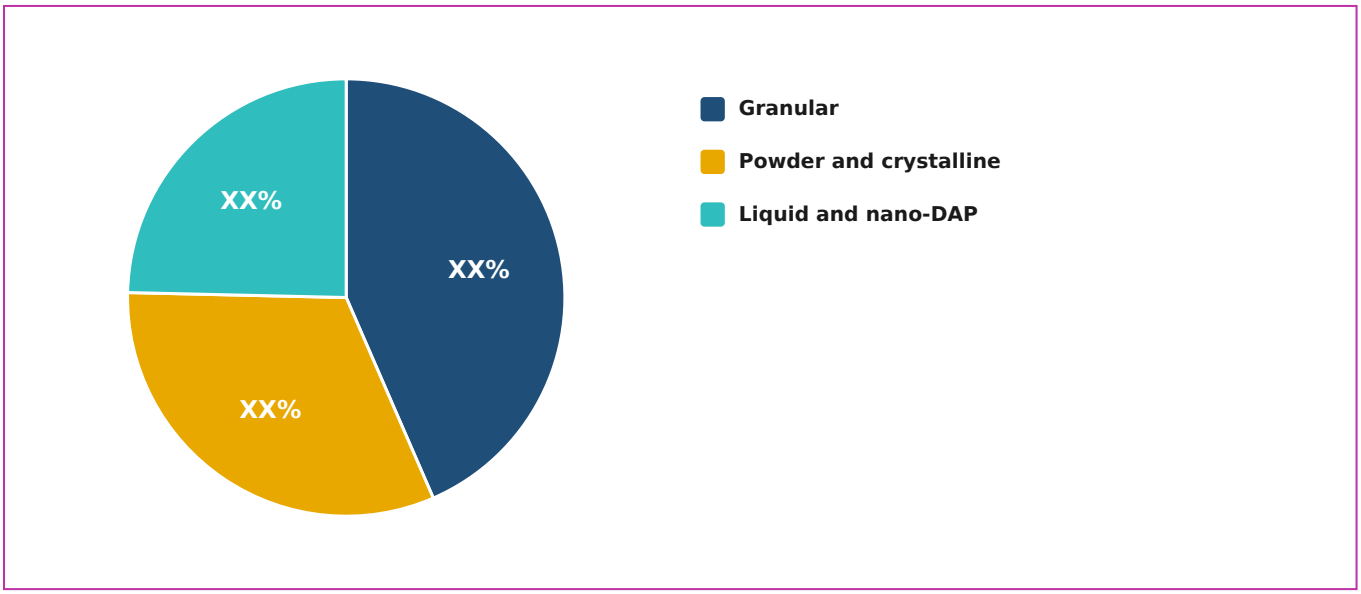
| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Agricultural grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Industrial grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Form

Granular product leads bulk commodity trade because it flows reliably through terminals, spreaders and seed drills and can be blended with potash and other dry nutrients. Powder and crystalline grades serve soluble-fertilizer and industrial applications. Liquid and nano-DAP remain small but expand rapidly through foliar application, lower logistics intensity and government-supported commercialization in India.

**Value share by form, 2025**




*Source: XXX*

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**Value by form, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Granular | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Powder and crystalline | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Liquid and nano-DAP | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Crop Application

Wheat, maize and rice make cereals and grains the largest application group, supported by extensive planted area and routine basal phosphate programs. Oilseeds and pulses are particularly important in Brazil, India, China and North America. Fruits and vegetables generate the fastest value growth because intensive cultivation, fertigation and quality targets support premium soluble and specialty formulations.

**Value by crop Application, 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 |
| Commercial and plantation crops | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Other crops and non-crop uses | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Distribution Channel

Distributor and retailer networks lead because DAP demand is seasonal, geographically dispersed and frequently sold alongside seed, crop protection and credit. Direct institutional supply is prominent in government tenders, cooperatives, large plantations and industrial accounts. Digital and marketplace channels remain small but are growing through transparent pricing, inventory visibility and last-mile aggregation.

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**Value by distribution Channel, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Distributors and agricultural retailers | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Cooperatives and government channels | 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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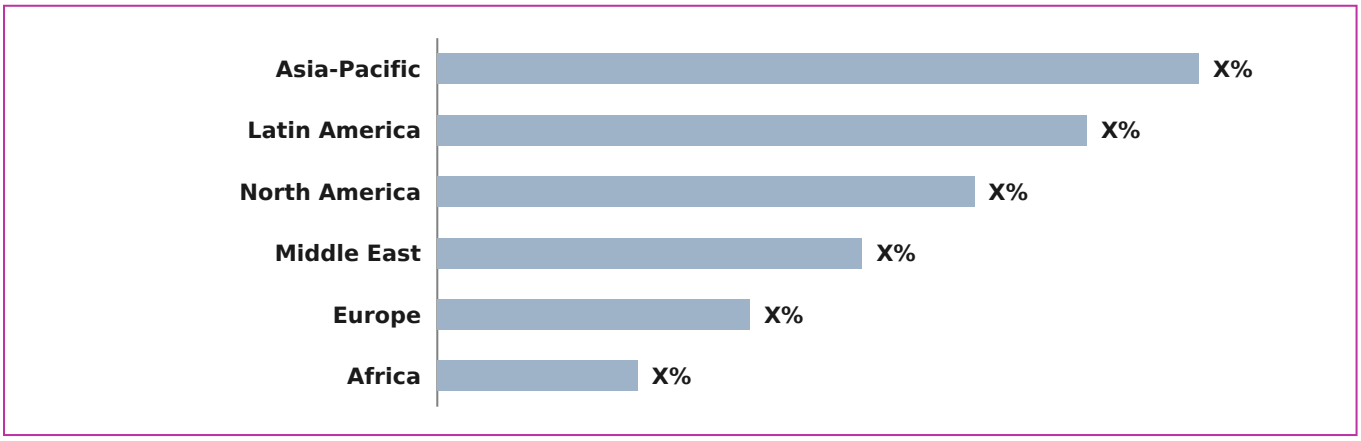
# Diammonium Phosphate Market Regional Analysis and Country Outlook

Asia-Pacific accounted for XX% of global DAP value in 2025. China combines the world's largest phosphate-rock output with substantial downstream conversion capacity, while India anchors seaborne demand through seasonal tenders and subsidy-supported retail pricing. Indonesia, Pakistan, Bangladesh and Vietnam add import demand tied to rice, maize, palm oil, wheat and horticultural production.

Africa is forecast to grow at XX% annually through 2031. Morocco is the region's export-production center, while Ethiopia, Nigeria, Egypt, Kenya and other Sub-Saharan markets provide the demand runway through higher fertilizer application, irrigation investment and expanding dealer networks. Port-to-farm logistics and credit availability remain the principal determinants of conversion from agronomic need to commercial sales.

North America and Latin America together represented XX% of 2025 value. The United States has an integrated domestic phosphate chain and sophisticated distribution infrastructure, whereas Brazil relies heavily on imports to support soybeans, maize and sugarcane. Europe is mature but strategically important for low-cadmium, traceable and lower-carbon products, with regulation reshaping supplier selection and product economics.

**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 |
| North America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Middle East | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Europe | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| 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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# Diammonium Phosphate Market Competitive Landscape and Company Share

The market has moderate concentration: a limited group of vertically integrated producers controls a large portion of exportable supply, while numerous national manufacturers, importers and cooperatives compete downstream. OCP, Mosaic, Ma'aden and PhosAgro hold structural advantages through resource ownership, phosphoric-acid integration, large granulation assets and established port infrastructure.

Capacity investment is shifting incremental supply toward Morocco and Saudi Arabia. OCP is expanding fertilizer and intermediate capacity across Jorf Lasfar and the Mzinda-Safi corridor, while Ma'aden's phosphate growth program targets a broader portfolio of commodity and specialty products. PhosAgro has increased flexible phosphate-fertilizer production at Balakovo, and Mosaic is prioritizing operational reliability and an 8-million-tonne phosphate run rate in the United States.

Competitive strategy is moving beyond nominal tonnes. Suppliers are building regional warehouses, direct agronomy channels, flexible MAP-DAP-NPS production, lower-carbon ammonia access and products differentiated by solubility, micronutrients and contaminant profile. Recent ownership changes, including Ma'aden's acquisition of Mosaic's interest in MWSPC, reinforce the value of integrated control over large phosphate platforms.

**Leading companies**

| Company | HQ | Est. revenue 2025 | Market share 2025 | YoY |
|---|---|---|---|---|
| OCP Group | XXX | XXX | XXX | XXX |
| The Mosaic Company | XXX | XXX | XXX | XXX |
| Saudi Arabian Mining Company (Ma'aden) | XXX | XXX | XXX | XXX |
| PhosAgro | XXX | XXX | XXX | XXX |
| Indian Farmers Fertiliser Cooperative Limited | XXX | XXX | XXX | XXX |
| Coromandel International Limited | XXX | XXX | XXX | XXX |
| Paradeep Phosphates Limited | XXX | XXX | XXX | XXX |
| Jordan Phosphate Mines Company | XXX | XXX | XXX | XXX |
| EuroChem Group | XXX | XXX | XXX | XXX |
| Yuntianhua Group | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Diammonium Phosphate Market Forecast and Strategic Opportunities

DAP demand will reach XXX metric tonnes in 2031, with market value rising to USD XXX billion. Baseline growth rests on crop nutrient replacement, expanding planted area in selected emerging markets and gradual improvement in fertilizer access, while nominal value also reflects structurally higher mining, energy, environmental and logistics costs.

The near-term balance remains sensitive to Chinese exports, Indian import tenders, sulphur availability and operating rates at major integrated complexes. A high-supply scenario in which Moroccan and Saudi projects ramp quickly would moderate benchmark prices and stimulate application, while delayed projects or renewed export restrictions would preserve a tighter, higher-price market.

Winning suppliers will combine advantaged feedstocks with commercial flexibility. Flexible product lines, inland distribution, digital agronomy, low-cadmium rock, lower-carbon ammonia and credible phosphogypsum management will command stronger customer access than capacity expansion alone.

## Opportunities

- Distribution and local granulation investment across Sub-Saharan Africa
- Low-cadmium and traceable DAP for regulated premium markets
- Micronutrient-fortified, water-soluble and nano-DAP formulations
- Digital soil-testing and prescription-based nutrient packages
- Low-carbon ammonia integration and renewable-powered processing
- Phosphogypsum valorization and circular recovery of phosphorus

> 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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