

# Global Ammonium Sulphate 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 6.2 bn |
| Forecast (2031) | USD 8.7 bn |
| CAGR (2021-2031) | 5.9% |
| Study period | 2021-2031 |
| Largest region | Asia-Pacific · 46.8% |
| Fastest-growing region | Latin America · 7.2% |
| Market concentration | Low |
| Licence | Individual / Company |

The global ammonium sulphate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Fertilizer applications account for XX% of demand as growers increasingly combine immediately available ammonium nitrogen with sulphate sulphur in a single nutrient application. Asia-Pacific leads with XX% of market value, supported by China's large caprolactam-linked production base and its XXX tonnes of ammonium sulphate exports in 2024. Latin America is the fastest-growing region as Brazil's sulphur-demanding cropping system absorbs rising volumes of granular imported material.

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# Executive summary

The global ammonium sulphate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Fertilizer applications account for XX% of demand as growers increasingly combine immediately available ammonium nitrogen with sulphate sulphur in a single nutrient application. Asia-Pacific leads with XX% of market value, supported by China's large caprolactam-linked production base and its XXX tonnes of ammonium sulphate exports in 2024. Latin America is the fastest-growing region as Brazil's sulphur-demanding cropping system absorbs rising volumes of granular imported material.

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

## Key findings

- Global ammonium sulphate market value was USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Market volume reached XXX tonnes in 2025 and will rise to XXX tonnes by 2031.
- Fertilizer applications generated XX% of 2025 market value, reflecting the product's combined XX% nitrogen and XX% sulphur nutrient proposition.
- Asia-Pacific held XX% of 2025 value, anchored by China's caprolactam by-product capacity and export platform.
- China exported XXX tonnes of HS 310221 ammonium sulphate worth USD XXX billion in 2024, according to UN Comtrade data disseminated through the World Bank WITS platform.
- Brazil received XXX tonnes of Chinese ammonium sulphate in 2024, making it China's largest country destination.
- Granular material represented XX% of market value in 2025 and will outgrow crystalline product as mechanized bulk blending expands.
- Caprolactam by-product routes supplied XX% of global volume in 2025, linking availability to nylon-chain operating rates as well as fertilizer economics.

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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 Ammonium Sulphate Market Trends and Growth Drivers

Ammonium sulphate sits at the intersection of the nitrogen, sulphur and nylon value chains. Agricultural demand is driven by crop nutrient requirements, yet almost half of global supply originates as a caprolactam co-product, making nylon operating rates and chemical-industry restructuring central to fertilizer availability.

Demand quality is shifting as commercial blenders and mechanized farms place a higher value on granule size, hardness, low dust and spreading uniformity. This creates a widening price and margin distinction between standard crystals and premium granules even where their nutrient analysis is identical.

Trade flows are becoming more concentrated around China-to-Brazil and China-to-Southeast Asia corridors. The resulting scale lowers ocean freight per tonne, but it also exposes import markets to Chinese operating decisions, vessel availability, port congestion and changes in trade policy.

## Growth drivers

### Widening Agricultural Sulphur Deficiency

Lower sulphur emissions from power generation and industry have reduced incidental atmospheric deposition across North America and Europe, while repeated high-yield harvests continue to remove sulphur from soil. Ammonium sulphate provides plant-available sulphate at application and is gaining inclusion in crop nutrition programmes where elemental sulphur mineralizes too slowly for immediate demand.

### Brazilian Row-Crop Intensification

Brazilian soybean, second-crop maize, cotton and sugarcane systems combine large planted areas with increasingly sophisticated nutrient management. Acidic and weathered soils, high nutrient removal and reliance on imported fertilizers support rapid growth in granular ammonium sulphate consumption through ports serving the Cerrado production belt.

### Granular Fertilizer Blending Expansion

Large, uniform granules flow and spread more consistently alongside phosphate and potash products than fine crystalline grades. Investments in compaction, granulation and bulk-handling systems are expanding the addressable market among commercial blenders and mechanized farms while sustaining a price premium over standard crystal material.

### Dual-Nutrient Economics

Ammonium sulphate supplies approximately XX% nitrogen and XX% sulphur, allowing growers to satisfy two nutrient requirements in one pass. The value proposition strengthens when agronomic sulphur credits and spreading costs are considered alongside the headline nitrogen price.

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### Chinese Export Availability

China's integrated caprolactam industry generates large by-product streams that are upgraded and distributed into global fertilizer channels. Competitive conversion costs and established maritime routes have allowed Chinese supply to serve Latin America, Southeast Asia, Turkey and Africa at scale.

### Sulphur-Demanding Oilseed Growth

Canola, soybean and other protein-rich oilseeds require sulphur for amino-acid formation, nodulation and efficient nitrogen use. Higher yield targets and greater agronomic awareness are moving ammonium sulphate from remedial treatment into planned annual fertility programmes.

## Restraints

### Feedstock and Energy Volatility

Synthetic ammonium sulphate economics are directly exposed to ammonia, sulphuric acid, natural gas and electricity costs. Sharp input-price changes compress conversion margins and can temporarily make alternative nitrogen or sulphur sources more attractive to distributors.

### Caprolactam Restructuring Risk

A substantial share of ammonium sulphate is generated as a co-product of caprolactam manufacturing rather than in response to fertilizer demand. Nylon-chain closures and operating-rate reductions in Japan, Europe and Southeast Asia can abruptly remove regional supply and disrupt established logistics.

### Substitution by Competing Nutrients

Urea offers higher nitrogen concentration, while elemental sulphur and sulphate-containing compound fertilizers can meet portions of the same agronomic requirement. Relative nutrient prices, blending constraints and local subsidy structures can therefore redirect demand away from ammonium sulphate.

### Freight and Handling Burden

Ammonium sulphate carries less nitrogen per tonne than urea, increasing transport and handling requirements for each unit of nitrogen delivered. Inland destinations with weak rail or river infrastructure face a structural landed-cost disadvantage, particularly during peak fertilizer seasons.

### Nitrogen-Use Regulation

Nutrient management rules, nitrate-vulnerable zones and farm-emission reduction programmes are tightening nitrogen application practices. These measures improve precision use but cap indiscriminate volume growth in mature agricultural markets.

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# Driver and Restraint Impact on the Ammonium Sulphate Market Forecast

### Drivers — impact on forecast

| Driver | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Widening Agricultural Sulphur Deficiency | XXX | XXX | XXX |
| Brazilian Row-Crop Intensification | XXX | XXX | XXX |
| Granular Fertilizer Blending Expansion | XXX | XXX | XXX |
| Dual-Nutrient Economics | XXX | XXX | XXX |
| Chinese Export Availability | XXX | XXX | XXX |
| Sulphur-Demanding Oilseed Growth | XXX | XXX | XXX |

*Source: XXX*

### Restraints — impact on forecast

| Restraint | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Feedstock and Energy Volatility | XXX | XXX | XXX |
| Caprolactam Restructuring Risk | XXX | XXX | XXX |
| Substitution by Competing Nutrients | XXX | XXX | XXX |
| Freight and Handling Burden | XXX | XXX | XXX |
| Nitrogen-Use Regulation | XXX | XXX | XXX |

*Source: XXX*

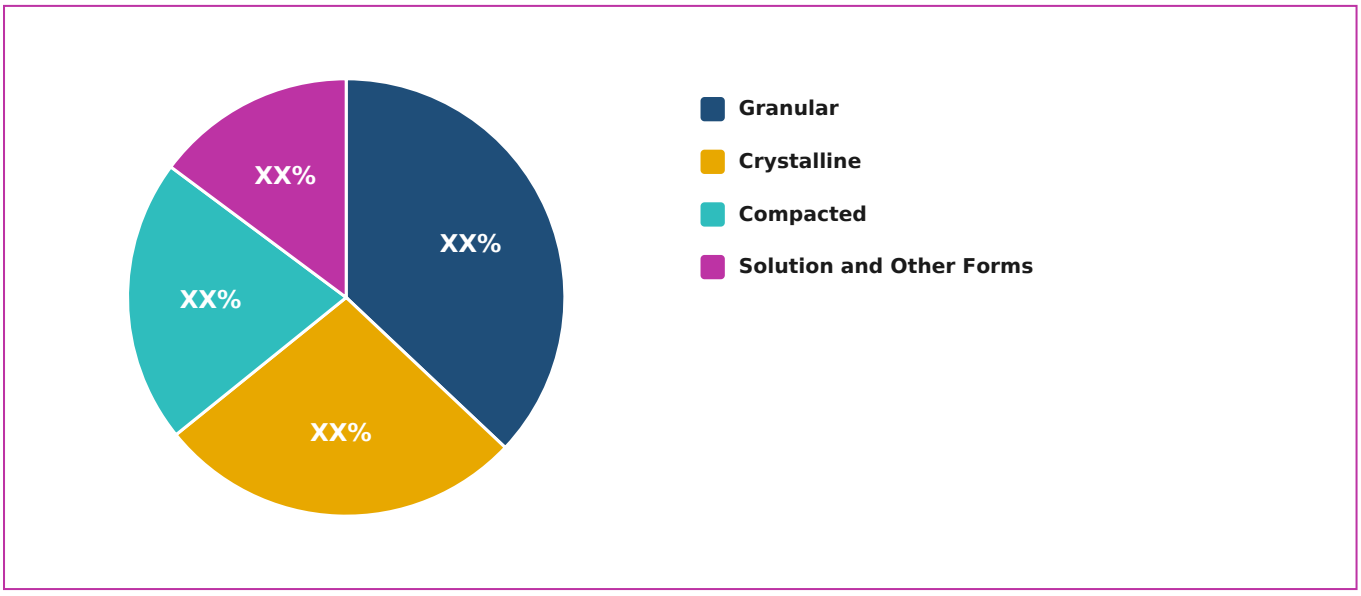
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# Ammonium Sulphate Market Segmentation by Form, Grade, Process and Application

## By Form

Granular material commands the leading position because its particle size, hardness and flow characteristics suit dry bulk blending and wide-swath mechanical spreading. Crystalline product remains important in Asia, industrial processing and cost-sensitive markets, while compacted and solution forms address local logistics or application requirements. Granules are the fastest-growing form as finishing capacity expands near ports and large farming regions.

**Value share by form, 2025**




*Source: XXX*

**Value by form, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Granular | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Crystalline | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Compacted | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Solution and Other Forms | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Grade

Fertilizer grade dominates because agriculture absorbs the overwhelming majority of global tonnage and tolerates specifications optimized for nutrient content and spreading. Industrial grade serves flame

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retardants, board manufacturing, textiles, detergents and chemical processing. Food, fermentation and pharmaceutical grades grow fastest from a smaller base as buyers pay for purity, traceability and controlled contaminant levels.

**Value by grade, USD bn**

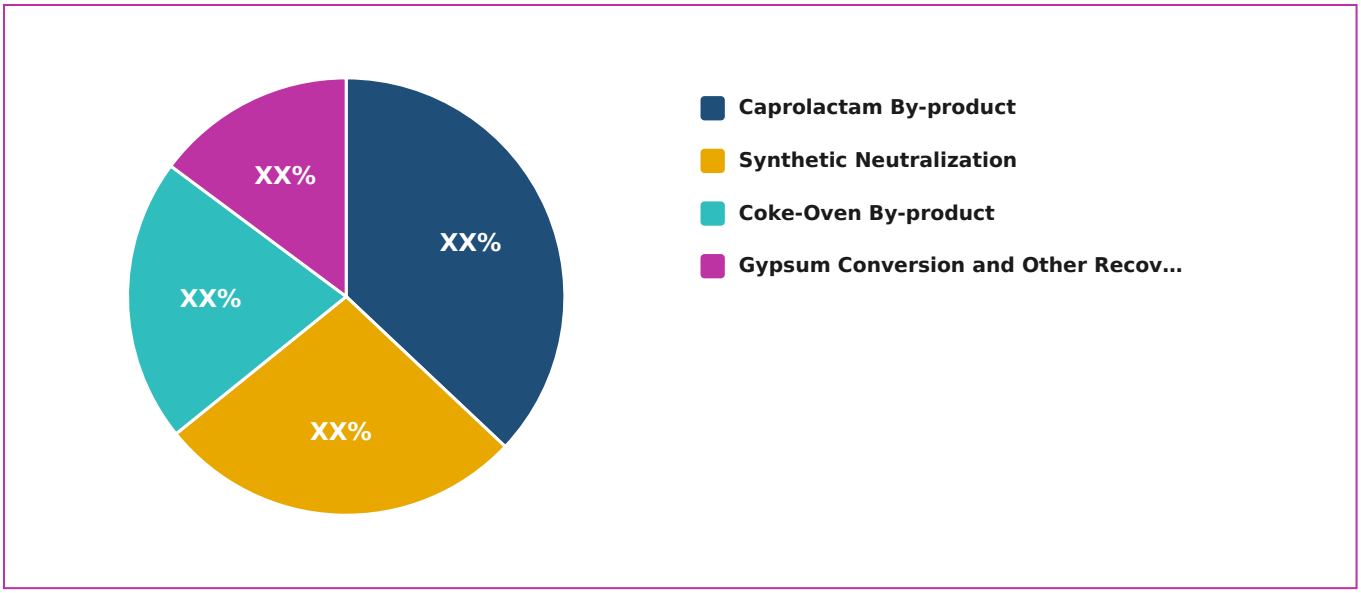
| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Fertilizer Grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Industrial Grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Food and Fermentation Grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Pharmaceutical and High-Purity Grade | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Production Process

Caprolactam by-product supply leads because conventional hydroxylamine-based nylon intermediate processes yield ammonium sulphate at scale. Synthetic neutralization offers production flexibility but is more directly exposed to ammonia and sulphuric acid economics. Coke-oven recovery remains regionally important, while gypsum and other recovery processes gain strategic relevance where waste-stream valorization supports circularity goals.

**Value share by production Process, 2025**




*Source: XXX*

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**Value by production Process, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Caprolactam By-product | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Synthetic Neutralization | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Coke-Oven By-product | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Gypsum Conversion and Other Recovery | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Application

Fertilizers lead through broad use in field crops, oilseeds, horticulture and blended NPK products. Industrial applications span flame-resistant textiles and paper, wood products, detergents and chemical synthesis, while water treatment uses the salt as a nutrient or process chemical. Fermentation, food processing and pharmaceutical uses expand faster because controlled-purity grades support enzymes, yeast cultivation and regulated formulations.

**Value by application, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Fertilizers | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Industrial Processing | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Water Treatment | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Food and Fermentation | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Pharmaceuticals and Other Applications | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Distribution Channel

Distributors and fertilizer blenders lead by aggregating vessel cargoes, converting crystals into market-ready blends and carrying seasonal working capital. Direct sales remain important for industrial users, national fertilizer groups and major agricultural accounts with dedicated storage. Digital procurement grows within both channels but does not displace the physical handling infrastructure required for a bulk, freight-intensive product.

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**Value by distribution Channel, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Distributors and Fertilizer Blenders | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Direct Producer Sales | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Retail and Digital Channels | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

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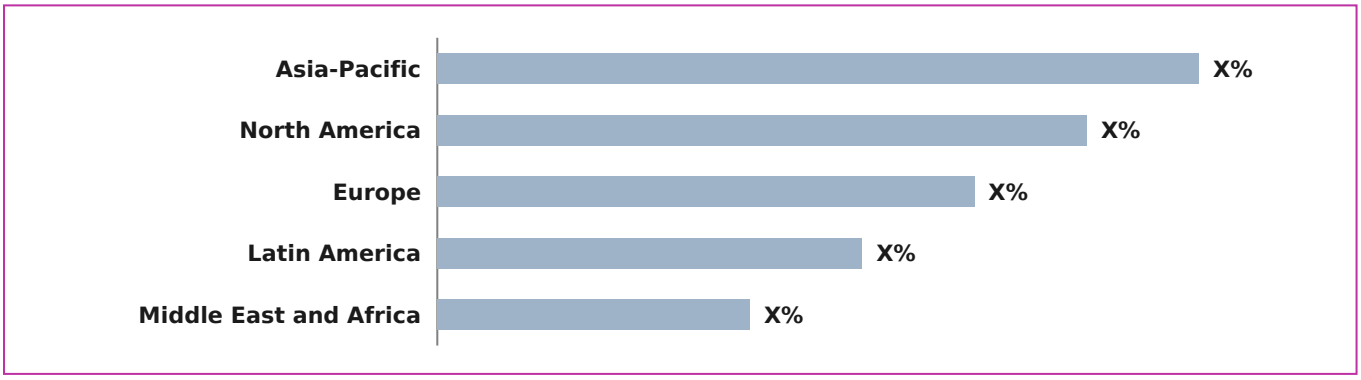
# Ammonium Sulphate Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global market value in 2025 and is both the largest production centre and the core source of internationally traded ammonium sulphate. China dominates regional output through extensive caprolactam-linked supply, dedicated conversion assets and coastal granulation capacity; its 2024 exports reached XXX tonnes. India, Indonesia, Vietnam, Thailand and the Philippines provide expanding outlets through rice, oil-palm, maize and horticultural fertilizer programmes, while restructuring in Japan reduces mature-market by-product availability.

Latin America will record the fastest regional CAGR of XX% through 2031. Brazil is the decisive growth engine: it imported XXX tonnes from China alone in 2024 and combines large-scale soybean, maize, sugarcane, coffee and cotton production with soils responsive to sulphur nutrition. Argentina, Mexico, Colombia, Peru and the Southern Cone add demand, although port capacity, inland trucking costs and seasonal working-capital requirements shape supplier competitiveness.

North America sustains premium demand for granular product used in dry bulk blending, led by the US Corn Belt and Canadian canola regions. Europe remains a significant producer-consumer but faces high energy costs, nitrogen-use regulation and caprolactam-chain rationalization. Middle East and Africa demand expands from a smaller base as fertilizer distribution deepens in Turkey, Nigeria, South Africa, Egypt and East Africa, with import access and farm affordability determining annual purchasing volumes.

**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 |
| North America | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Europe | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Latin 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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# Ammonium Sulphate Market Competitive Landscape and Company Share

The global market has low concentration because large Chinese exporters, integrated caprolactam producers, coke-oven operators, synthetic producers and regional fertilizer distributors all participate in supply. The ten largest producers controlled XX% of 2025 merchant value, while the remainder was distributed across numerous Chinese plants and regional industrial by-product sources. Scale in upstream chemicals does not automatically translate into fertilizer leadership; granulation yield, storage, port access, product consistency and seasonal channel relationships are central competitive assets.

AdvanSix holds a strong North American position through its Hopewell integrated chain and Sulf-N brand, with the SUSTAIN programme targeting approximately XXX tonnes per year of additional granular capability. UBE is raising the share of higher-value large-grain material while reducing caprolactam output in Japan, demonstrating the strategic shift from undifferentiated by-product volume toward premium particle size. DOMO Chemicals, Fibrant, BASF, KuibyshevAzot, GSFC and major Chinese chemical groups compete through integrated feedstocks and established regional logistics.

Competitive investment will remain concentrated in granulation, compaction, screening, emissions control and loading infrastructure rather than greenfield synthetic capacity alone. Producers are also positioning around lower-carbon ammonia, verified product footprints and recovered industrial nitrogen streams. Consolidation opportunities are strongest in distribution and finishing assets, while the fragmented Chinese production base limits rapid concentration at the global level.

**Leading companies**

| Company | HQ | Est. revenue 2025 | Market share 2025 | YoY |
|---|---|---|---|---|
| AdvanSix Inc. | XXX | XXX | XXX | XXX |
| BASF SE | XXX | XXX | XXX | XXX |
| DOMO Chemicals GmbH | XXX | XXX | XXX | XXX |
| Fibrant B.V. | XXX | XXX | XXX | XXX |
| UBE Corporation | XXX | XXX | XXX | XXX |
| Sinopec Corporation | XXX | XXX | XXX | XXX |
| Gujarat State Fertilizers & Chemicals Limited | XXX | XXX | XXX | XXX |
| KuibyshevAzot PJSC | XXX | XXX | XXX | XXX |
| OCI Nitrogen B.V. | XXX | XXX | XXX | XXX |
| Fertiberia S.A. | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Ammonium Sulphate Market Forecast and Strategic Opportunities

The market will add USD XXX billion of annual value between 2025 and 2031 as fertilizer demand expands and the product mix shifts toward granular and premium grades. Agricultural applications remain the volume anchor, but fermentation, flame-retardant formulations, water treatment and specialty chemical uses provide higher-value niches with tighter purity and consistency requirements.

The central forecast assumes steady Chinese export availability, continued expansion of sulphur nutrition in Brazil and North America, and manageable rationalization of caprolactam capacity in Japan and Europe. An upside path emerges if row-crop prices sustain aggressive nutrient application and logistics investment lowers inland costs in Latin America; a downside path would combine weaker crop economics, abrupt trade controls and prolonged pressure on nylon-chain operating rates.

Winning suppliers will match low conversion cost with granular product quality, dependable vessel or rail execution and agronomic market development. Regional finishing near ports, crop-specific demand creation and auditable carbon-intensity data will produce stronger returns than commodity crystal expansion without secured channels.

## Opportunities

- Granulation and compaction investments near consuming regions
- Brazilian and wider Latin American fertilizer imports
- Crop-specific sulphur programmes for soybean, canola and maize
- Low-carbon and traceable ammonium sulphate grades
- Recovery of ammonium sulphate from industrial and circular-economy streams
- Water-soluble and controlled-particle-size specialty products
- Digital agronomy and variable-rate nutrient application

> 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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