


# Global Calcium Ammonium Nitrate (CAN) 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 11.4 bn |
| Forecast (2031) | USD 15.9 bn |
| CAGR (2021-2031) | 5.7% |
| Study period | 2021-2031 |
| Largest region | Europe · 42.6% |
| Fastest-growing region | Asia-Pacific · 7.1% |
| Market concentration | Moderate |
| Licence | Individual / Company |

The global calcium ammonium nitrate market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Europe accounted for XX% of market value, supported by established nitrate-based fertilization practices, extensive domestic capacity and the agronomic preference for CAN on temperate crops. Granular XX% nitrogen products remain the commercial core of the market, while low-carbon nitrate fertilizers, stabilized formulations and precision application programs are creating the strongest premium-growth opportunities. Supply security, natural-gas economics, carbon regulation and tighter nutrient-loss controls will determine producer competitiveness through 2031.

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# Executive summary

The global calcium ammonium nitrate market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Europe accounted for XX% of market value, supported by established nitrate-based fertilization practices, extensive domestic capacity and the agronomic preference for CAN on temperate crops. Granular XX% nitrogen products remain the commercial core of the market, while low-carbon nitrate fertilizers, stabilized formulations and precision application programs are creating the strongest premium-growth opportunities. Supply security, natural-gas economics, carbon regulation and tighter nutrient-loss controls will determine producer competitiveness through 2031.

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

## Key findings

- The global CAN market generated USD XXX billion in 2025 and will reach USD XXX billion by 2031.
- Global market volume totaled XXX metric tonnes in 2025 and is forecast to reach XXX metric tonnes in 2031.
- Europe held XX% of 2025 market value, reflecting entrenched nitrate-fertilizer use and dense regional production infrastructure.
- Asia-Pacific is the fastest-growing region, advancing at a XX% CAGR through 2031 as intensive horticulture and balanced nitrogen-calcium nutrition expand.
- Standard XX% nitrogen CAN represented XX% of 2025 revenue, while stabilized and specialty CAN grades recorded the highest product CAGR at XX%.
- Cereals and grains accounted for XX% of CAN demand value in 2025; fruits and vegetables are growing faster at XX% annually.
- FAO reported XXX tonnes of global agricultural nitrogen fertilizer use in 2022, down XX% from 2021.
- FAO reported total global inorganic fertilizer use of XXX tonnes of nitrogen, phosphate and potash nutrients in 2022.

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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 Calcium Ammonium Nitrate Market Trends and Growth Drivers

CAN demand sits at the intersection of crop economics and industrial energy markets. Farmers value its combined nitrate and ammonium nutrition, spreading performance and calcium-bearing matrix, while producers must manage exposure to natural gas, ammonia, nitric acid, limestone, power and seasonal logistics. This dual exposure creates pronounced cycles in price, plant utilization and regional trade.

The growth story is increasingly differentiated by crop and technology. Mature European cereal markets provide the largest installed demand base, whereas horticulture, enhanced-efficiency formulations and low-carbon procurement deliver the strongest growth. Asia-Pacific distributors are broadening CAN adoption through calcium-nutrition positioning, while European suppliers are using verified carbon footprints and digital agronomy to defend premium pricing.

Regulation operates as both a constraint and a market-shaping catalyst. Nutrient-loss rules restrict indiscriminate nitrogen application, but they also reward products and services that improve timing, spreading accuracy and nitrogen-use efficiency. Carbon pricing, import measures and explosives-precursor controls increase compliance costs while strengthening the position of integrated, traceable suppliers.

## Growth drivers

### Food-security investment raises nitrogen demand

Governments and commercial growers are prioritizing yield stability as cultivated land per capita declines and weather volatility increases. CAN benefits where farmers require rapid nitrate availability, predictable top-dressing performance and lower volatilization exposure than surface-applied urea.

### Horticulture increases calcium-nitrogen intensity

Fruit, vegetable and protected-crop systems place a high economic value on uniform nitrogen response and calcium availability. Expansion of commercial horticulture supports premium CAN grades and smaller, more frequent application programs, particularly in Asia-Pacific and the Mediterranean basin.

### Precision fertilization improves product economics

Variable-rate spreading, crop sensors and digital nutrient plans improve CAN placement and nitrogen-use efficiency. These tools strengthen the value proposition of uniform granules, inhibitor-treated grades and agronomy-backed supply contracts.

### Low-carbon food chains create premium demand

Food processors and retailers are contracting lower-carbon fertilizers to reduce agricultural supply-chain emissions. CAN producers with renewable-ammonia access, verified footprints and farm-level measurement can secure premiums and multi-year offtake commitments.

### Supply diversification supports domestic operating rates

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European trade measures and food-security policies are redirecting procurement toward domestic and diversified suppliers. Higher regional plant utilization supports CAN availability and investment in ammonia, nitric-acid and granulation assets.

### Balanced nitrogen-calcium nutrition gains adoption

Soil acidification, calcium depletion and the need for stronger crop quality are widening the addressable market beyond conventional European cereal systems. Distributors increasingly position CAN as a balanced nutrition product rather than a commodity nitrogen source.

## Restraints

### Gas and ammonia volatility compress margins

Ammonia and nitric acid dominate CAN production economics, making regional gas-price spreads decisive for operating rates. Sudden energy-cost increases can trigger curtailments, raise working-capital requirements and accelerate substitution toward imported nitrogen products.

### Nitrate-loss regulation limits application intensity

Water-quality rules, nutrient budgets and seasonal spreading restrictions require tighter alignment between nitrogen applications and crop demand. These controls moderate volume growth in mature markets while favoring stabilized products and precision services.

### Urea retains a delivered-cost advantage

Urea's high nutrient concentration reduces freight and storage cost per unit of nitrogen, particularly across long-distance import markets. CAN must compete through agronomic performance, lower volatilization exposure and bundled advisory services.

### Security controls raise distribution costs

Ammonium-nitrate-based fertilizers face product-compliance, traceability, packaged-sale and explosives-precursor obligations in multiple jurisdictions. Compliance favors established suppliers but raises handling costs and constrains distribution through smaller or informal channels.

### Decarbonization requires capital-intensive conversion

Renewable hydrogen, carbon capture and low-emission nitric-acid systems require substantial capital and dependable clean-energy supply. Producers unable to finance conversion risk carbon-cost exposure and weaker access to premium procurement programs.

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# Calcium Ammonium Nitrate Driver and Restraint Impact on the Forecast

### Drivers — impact on forecast

| Driver | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Food-security investment raises nitrogen demand | XXX | XXX | XXX |
| Horticulture increases calcium-nitrogen intensity | XXX | XXX | XXX |
| Precision fertilization improves product economics | XXX | XXX | XXX |
| Low-carbon food chains create premium demand | XXX | XXX | XXX |
| Supply diversification supports domestic operating rates | XXX | XXX | XXX |
| Balanced nitrogen-calcium nutrition gains adoption | XXX | XXX | XXX |

*Source: XXX*

### Restraints — impact on forecast

| Restraint | Impact on CAGR | Geography | Horizon |
|---|---|---|---|
| Gas and ammonia volatility compress margins | XXX | XXX | XXX |
| Nitrate-loss regulation limits application intensity | XXX | XXX | XXX |
| Urea retains a delivered-cost advantage | XXX | XXX | XXX |
| Security controls raise distribution costs | XXX | XXX | XXX |
| Decarbonization requires capital-intensive conversion | XXX | XXX | XXX |

*Source: XXX*

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# Calcium Ammonium Nitrate Market Segmentation Analysis

## By Product Type

Standard XX% nitrogen CAN dominates because its nutrient balance, handling characteristics and agronomic familiarity align with broad-acre European applications. CAN containing approximately XX% nitrogen serves markets with established national specifications and calcium or magnesium positioning. Specialty formulations are gaining share as nitrification inhibitors, sulfur inclusion, micronutrients and verified low-carbon attributes support higher realizations.

**Value by product Type, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Standard CAN, 27% nitrogen | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| CAN, approximately 26% nitrogen | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Specialty, stabilized and enriched CAN | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Form

Granular CAN leads because uniform particle size supports modern centrifugal spreaders, blending and longer transport chains. Prilled CAN retains a strong position in local markets and applications where rapid dissolution and established plant configurations matter. Premium growth favors high-strength, low-dust granules with consistent spread patterns.

**Value by form, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Granular | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Prilled | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Application

Cereals and grains remain the largest application because CAN is widely applied as a spring and top-dressing nitrogen source for wheat, barley and maize. Oilseeds form the second-largest broad-acre opportunity, particularly in European rapeseed systems. Fruits and vegetables will gain share as growers prioritize marketable yield, calcium nutrition and predictable nitrate response.

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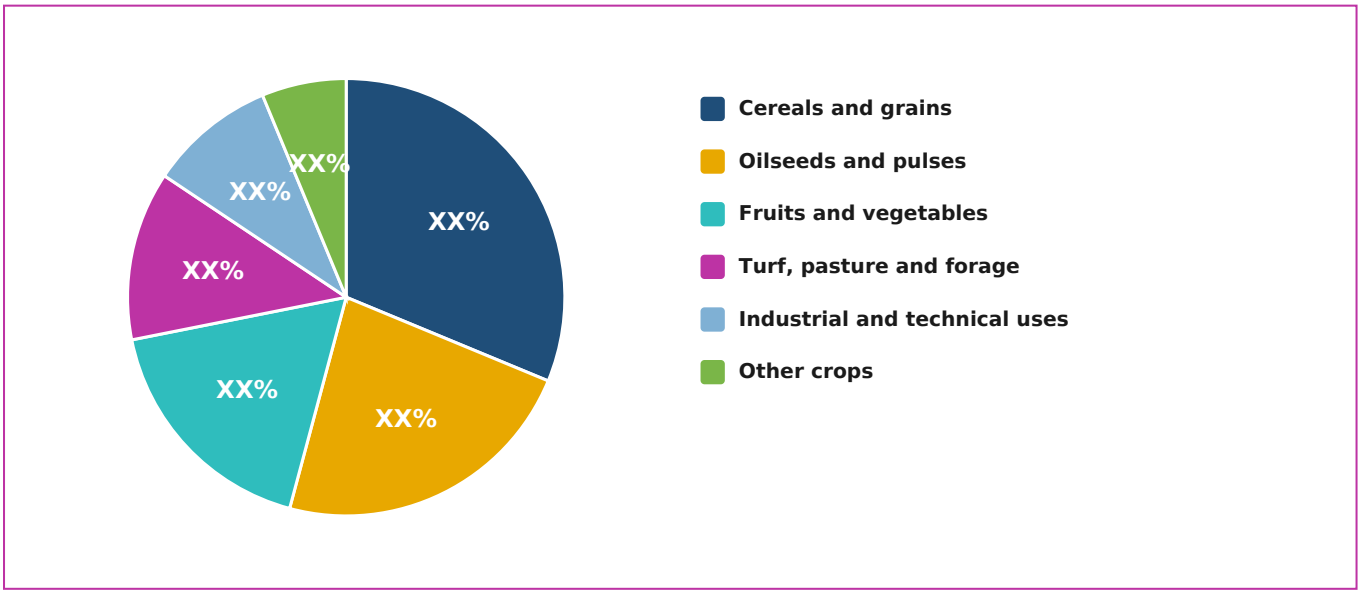
**Value share by application, 2025**




*Source: XXX*

**Value by 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 |
| Turf, pasture and forage | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Industrial and technical uses | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Other crops | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Distribution Channel

Direct producer sales dominate deliveries to cooperatives, large farms, blenders and national procurement programs because seasonal volume commitments and logistics planning are central to CAN economics. Agricultural distributors remain indispensable for fragmented farms, agronomic support and local credit. Digital channels are growing from a small base through price discovery, inventory visibility and integrated farm-input platforms.

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**Value by distribution Channel, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Direct sales and cooperatives | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Agricultural distributors and retailers | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Digital and platform-enabled sales | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

## By Technology Attribute

Conventional CAN remains the volume standard, but procurement is segmenting by product footprint and nutrient efficiency. Enhanced-efficiency products use inhibitors, coatings or complementary nutrients to limit losses and support differentiated agronomic claims. Low-carbon CAN is the fastest-growing tier as renewable ammonia, emissions abatement and verified footprint data enter food-chain contracts.

**Value by technology Attribute, USD bn**

| Segment | 2026 | 2027 | 2028 | 2029 | 2030 | 2031 | Share 2025 | CAGR |
|---|---|---|---|---|---|---|---|---|
| Conventional CAN | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Enhanced-efficiency CAN | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Certified low-carbon CAN | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |

*Source: XXX*

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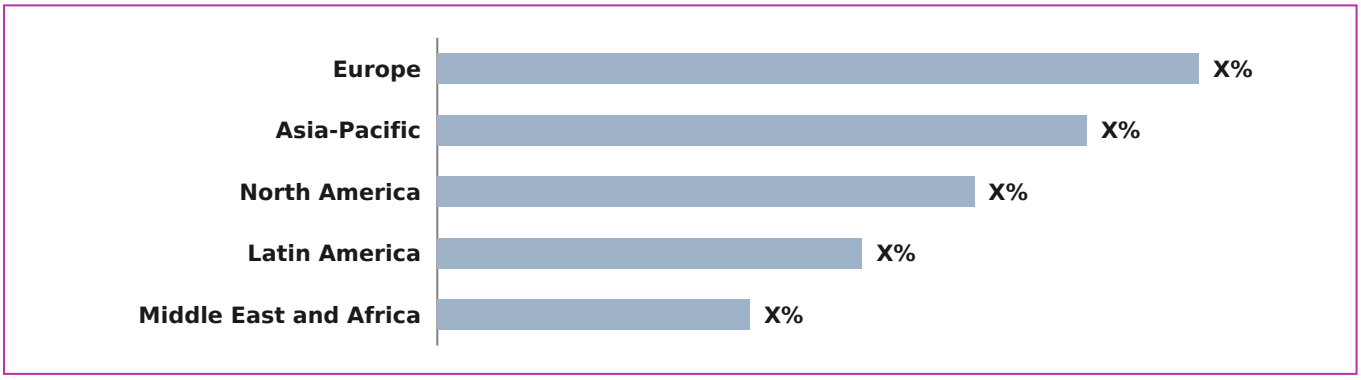
# Calcium Ammonium Nitrate Market Regional Analysis and Country Outlook

Europe generated XX% of global CAN revenue in 2025 and remains the category's manufacturing and application center. France, Germany, Poland, the United Kingdom and Central Europe sustain large cereal and oilseed demand, while regional producers benefit from longstanding farmer familiarity with nitrate-based nutrition. The market is simultaneously being reshaped by carbon costs, EU fertilizer-product rules, tighter nutrient management and the phased tariffs applied to specified Russian and Belarusian nitrogen fertilizers.

Asia-Pacific is forecast to expand at a XX% CAGR, the fastest regional rate through 2031. China and India provide scale, but the highest-value opportunities occur in horticultural belts across China, India, Vietnam and Southeast Asia, where calcium nutrition, crop quality and rapid nitrogen response justify a premium over commodity urea. Distribution partnerships, localized pack sizes and agronomic demonstration programs are critical because CAN familiarity varies materially by country.

North America remains a selective market because anhydrous ammonia, urea, UAN and ammonium nitrate occupy established positions. Latin America and the Middle East and Africa offer faster volume growth from commercial fruit, vegetable and grain production, although imported-product economics, port access and currency volatility shape purchasing cycles. Brazil, Türkiye, Egypt and South Africa are the principal non-European country opportunities in the forecast.

**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 |
|---|---|---|---|---|---|---|---|---|
| Europe | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| Asia-Pacific | XXX | XXX | XXX | XXX | XXX | XXX | XXX | XXX |
| North America | 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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# Calcium Ammonium Nitrate Market Competitive Landscape and Company Share

The global CAN market is moderately concentrated, with the leading ten suppliers accounting for XX% of 2025 revenue. Yara International holds the largest individual position, followed by AGROFERT and its LAT Nitrogen operations, Fertiberia, Grupa Azoty and EuroChem. Regional production economics and distribution reach matter more than global scale alone because CAN has a lower nitrogen concentration and higher freight burden than urea.

The competitive structure changed materially when AGROFERT completed its EUR XXX acquisition of Borealis' nitrogen business in July 2023, adding production assets in Austria, Germany and France and expanding its commercial network. Producers are now directing investment toward plant reliability, lower-carbon ammonia, nitrous-oxide abatement, enhanced-efficiency coatings and product-footprint verification rather than undifferentiated capacity additions.

Commercial strategy is moving downstream. Yara, Fertiberia and OCI have linked lower-carbon fertilizers with food companies, cooperatives and regional distributors, converting emissions performance into contracted demand. Winning suppliers through 2031 will combine secure ammonia sourcing, consistent granule quality, field agronomy, digital nutrient management and auditable carbon-intensity data.

**Leading companies**

| Company | HQ | Est. revenue 2025 | Market share 2025 | YoY |
|---|---|---|---|---|
| Yara International ASA | XXX | XXX | XXX | XXX |
| AGROFERT Group | XXX | XXX | XXX | XXX |
| LAT Nitrogen | XXX | XXX | XXX | XXX |
| Fertiberia S.A. | XXX | XXX | XXX | XXX |
| Grupa Azoty S.A. | XXX | XXX | XXX | XXX |
| EuroChem Group AG | XXX | XXX | XXX | XXX |
| OCI Global | XXX | XXX | XXX | XXX |
| Achema AB | XXX | XXX | XXX | XXX |
| CF Industries Holdings, Inc. | XXX | XXX | XXX | XXX |
| Gübre Fabrikaları T.A.Ş. | XXX | XXX | XXX | XXX |

*Source: XXX*

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# Calcium Ammonium Nitrate Market Forecast and Commercial Opportunities

The CAN market will add USD XXX billion of annual revenue between 2025 and 2031. Volume growth will be concentrated in intensive cropping systems, while value growth will also reflect higher specifications, inhibitor use, carbon attributes and continued energy-cost pass-through. Standard granular CAN remains the anchor product, but its revenue share will gradually yield to stabilized, sulfur-enriched and low-carbon formulations.

The central forecast assumes normalization of European plant utilization, continued Asian horticultural expansion and gradual rather than abrupt substitution among nitrogen products. An upside scenario develops if food-company Scope 3 programs establish durable premiums for low-carbon nitrate fertilizer; the downside case centers on prolonged gas-price dislocation, accelerated urea substitution and tighter nitrogen application ceilings.

Commercial success will depend on monetizing outcomes rather than nutrient tonnage alone. Producers able to document crop response, lower product footprints and better nitrogen-use efficiency will defend margins, while importers and distributors will gain share by localizing formulations, packaging and credit terms for emerging-market growers.

## Opportunities

- Certified low-carbon and renewable-ammonia-based CAN
- Stabilized CAN with nitrification inhibitors
- CAN plus sulfur and micronutrient formulations
- Country-level import substitution and regional capacity restoration
- Crop-specific nutrition programs for fruit, vegetables and oilseeds
- Digital prescription, variable-rate application and nutrient traceability
- Food-company offtake contracts tied to Scope 3 emission reductions

> 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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