

Global Monoammonium Phosphate (MAP) 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 18.7 bn
Forecast (2031)	USD 25 bn
CAGR (2021-2031)	4.9%
Study period	2021-2031
Largest region	Asia-Pacific · 45.2%
Fastest-growing region	Latin America · 5.8%
Market concentration	Moderate
Licence	Individual / Company

The global monoammonium phosphate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Agricultural fertilizers account for XX% of demand, supported by MAP's concentrated phosphorus content, compatibility with precision placement and suitability for low-ammonia-loss applications. Asia-Pacific leads with XX% of market value, while Latin America is the fastest-growing region at a XX% CAGR as Brazil, Argentina and neighboring crop exporters intensify phosphorus replacement. Supply remains moderately concentrated around vertically integrated phosphate-rock, phosphoric-acid and ammonia producers, making feedstock access, trade policy and logistics decisive competitive factors.

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Table of contents

1 Introduction and Report Scope

1.1 Monoammonium Phosphate Market Definition

1.2 Study Scope and Boundaries

1.3 Units, Currency and Conversion Conventions

2 Research Methodology

2.1 Research Design and Source Hierarchy

2.2 Primary Interview Programme

2.3 Market Sizing and Triangulation

2.4 Forecast Model and Scenario Analysis

3 Executive Summary

3.1 Market Size, Volume and CAGR

3.2 Key Segment and Regional Findings

3.3 Strategic Takeaways

4 Industry Structure and Market Fundamentals

4.1 MAP Chemistry, Grades and Specifications

4.2 Phosphate Rock, Phosphoric Acid and Ammonia Value Chain

4.3 Production Economics and Cost Curve

4.4 Price Formation and Benchmark Trends

5 Monoammonium Phosphate Market Dynamics

5.1 Market Growth Drivers

5.1.1 Crop Nutrient Removal and Food Production

5.1.2 Precision Placement and Starter Fertilizers

5.1.3 Latin American Agricultural Expansion

5.2 Market Restraints

5.2.1 Feedstock Cost and Affordability Pressure

5.2.2 Trade Barriers and Environmental Controls

5.3 Porter's Five Forces Analysis

6 Market Size and Forecast by Grade

6.1 Fertilizer Grade

6.2 Technical and Purified Grade

7 Market Size and Forecast by Form

7.1 Granular

7.2 Powder and Crystal

7.3 Solution and Water-Soluble Formulations

8 Market Size and Forecast by Application

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8.1 Direct Fertilizer Application and Bulk Blending
8.2 Water-Soluble Fertilizers and Fertigation
8.3 Fire Extinguishing Agents
8.4 Food, Feed and Fermentation
8.5 Other Industrial Applications
9 Market Size and Forecast by Crop Type and Channel
9.1 Cereals and Grains
9.2 Oilseeds and Pulses
9.3 Fruits, Vegetables and Plantation Crops
9.4 Direct, Distribution and Retail Channels
10 Monoammonium Phosphate Market Regional Analysis
10.1 North America
10.1.1 United States
10.1.2 Canada
10.1.3 Mexico
10.2 Europe
10.2.1 Germany
10.2.2 France
10.2.3 United Kingdom
10.2.4 Spain
10.2.5 Italy
10.2.6 Russia
10.2.7 Rest of Europe
10.3 Asia-Pacific
10.3.1 China
10.3.2 India
10.3.3 Japan
10.3.4 Australia
10.3.5 Indonesia
10.3.6 Vietnam
10.3.7 Rest of Asia-Pacific
10.4 Latin America
10.4.1 Brazil
10.4.2 Argentina
10.4.3 Chile
10.4.4 Rest of Latin America
10.5 Middle East and Africa
10.5.1 Morocco

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10.5.2 Saudi Arabia
10.5.3 South Africa
10.5.4 Egypt
10.5.5 Rest of Middle East and Africa
11 Trade, Tariffs and Regulatory Analysis
11.1 Global MAP Trade Flows
11.2 Duties, Subsidies and Export Controls
11.3 Product Standards and Environmental Regulation
12 Competitive Landscape
12.1 Market Share and Strategic Positioning
12.2 Capacity Expansions, M&A and Partnerships
12.3 Company Profiles
12.3.1 OCP Group
12.3.2 The Mosaic Company
12.3.3 PhosAgro
12.3.4 Ma'aden
12.3.5 Nutrien Ltd.
12.3.6 EuroChem Group
12.3.7 ICL Group
12.3.8 Jordan Phosphate Mines Company
12.3.9 Coromandel International Limited
12.3.10 Paradeep Phosphates Limited
13 Forecast Scenarios and Strategic Opportunities
13.1 Base, High and Low Forecast Scenarios
13.2 Regional and Product Opportunity Ranking
13.3 Strategic Recommendations

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List of tables

Table 1. Global MAP Market Snapshot, 2025 and 2031

Table 2. Headline Forecast by Value, Volume and Average Price, 2021-2031

Table 3. Leading Segments and Fastest-Growing Segments, 2025-2031

Table 4. MAP Chemical, Nutrient and Commercial Grade Specifications

Table 5. MAP Production Route and Material Input Requirements per Tonne

Table 6. Regional Feedstock and Conversion Cost Benchmark, 2025

Table 7. Global Phosphate Rock Production and Reserves by Leading Country

Table 8. MAP Pricing Benchmarks by Grade, Region and Delivery Basis

Table 9. MAP Market Driver Impact Matrix by Region and Horizon

Table 10. MAP Market Restraint Impact Matrix by Region and Horizon

Table 11. MAP Demand Sensitivity to Crop Prices and Fertilizer Affordability

Table 12. Porter's Five Forces Assessment for the MAP Industry

Table 13. MAP Market Value and Volume by Grade, 2021-2031

Table 14. MAP Market Value and Volume by Form, 2021-2031

Table 15. MAP Market Value and Volume by Application, 2021-2031

Table 16. Agricultural MAP Value and Volume by Crop Type, 2021-2031

Table 17. MAP Market Value by Distribution Channel, 2021-2031

Table 18. Segment Pricing and Margin Comparison, 2025

Table 19. North America MAP Market by Country, 2021-2031

Table 20. Europe MAP Market by Country, 2021-2031

Table 21. Asia-Pacific MAP Market by Country, 2021-2031

Table 22. Latin America MAP Market by Country, 2021-2031

Table 23. Middle East and Africa MAP Market by Country, 2021-2031

Table 24. Regional MAP Production, Consumption and Trade Balance, 2025

Table 25. MAP International Trade by Origin and Destination, 2021-2025

Table 26. HS Classification and Customs Treatment for MAP Products

Table 27. Phosphate Fertilizer Duties and Trade Measures by Market

Table 28. Fertilizer Subsidy and Price-Support Programs by Country

Table 29. MAP Product, Contaminant and Labeling Standards by Region

Table 30. Leading MAP Producers: Capacity, Assets and Geographic Reach

Table 31. OCP Group Company Profile

Table 32. The Mosaic Company Company Profile

Table 33. PhosAgro Company Profile

Table 34. Ma'aden Company Profile

Table 35. Nutrien Ltd. Company Profile

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Table 36. EuroChem Group Company Profile

Table 37. ICL Group Company Profile

Table 38. Jordan Phosphate Mines Company Company Profile

Table 39. Coromandel International Limited Company Profile

Table 40. Paradeep Phosphates Limited Company Profile

Table 41. MAP Market Forecast Scenarios and Assumptions, 2026-2031

Table 42. Regional Revenue Opportunity Ranking, 2025-2031

Table 43. Specialty MAP Opportunity Matrix by Grade and End Use

Table 44. Planned Phosphate Capacity and Debottlenecking Projects

Table 45. Market Scope, Definitions and Exclusions

Table 46. Primary Interview Respondent Mix

Table 47. Data Source Hierarchy and Validation Rules

Table 48. Forecast Variables, Weights and Scenario Triggers

Table 49. Market value by year, USD bn

Table 50. Year-over-year value change

Table 51. Drivers — impact on forecast

Table 52. Restraints — impact on forecast

Table 53. Value by grade, USD bn

Table 54. Value by form, USD bn

Table 55. Value by application, USD bn

Table 56. Value by crop Type, USD bn

Table 57. Value by distribution Channel, USD bn

Table 58. Market value by region, USD bn

Table 59. Market value by leading country, USD bn

Table 60. Leading companies

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List of figures

Figure 1. Global MAP Market Value, 2021-2031

Figure 2. Global MAP Market Volume and Average Realized Price, 2021-2031

Figure 3. MAP Market Attractiveness by Region, 2025-2031

Figure 4. MAP Production Cost Structure by Input, 2025

Figure 5. MAP, DAP, Ammonia and Sulfur Price Trend Index, 2021-2026

Figure 6. Driver and Restraint Impact on MAP CAGR

Figure 7. Global Phosphorus Fertilizer Consumption Trend, 2021-2028

Figure 8. MAP Market Share by Grade, 2025

Figure 9. MAP Market Share by Application, 2025

Figure 10. MAP Segment CAGR by Form and Channel, 2025-2031

Figure 11. Global MAP Market Share by Region, 2025

Figure 12. MAP Market CAGR by Region, 2025-2031

Figure 13. Net MAP Import Dependence by Major Market, 2025

Figure 14. Leading MAP Export Origins and Import Destinations, 2025

Figure 15. MAP and DAP Seaborne Trade Trend, 2021-2025

Figure 16. Global MAP Producer Market Share, 2025

Figure 17. Leading Producer Phosphate Capacity and Integration Position

Figure 18. MAP Market Forecast under Base, High and Low Scenarios, 2026-2031

Figure 19. Strategic Opportunity Attractiveness by Application and Region

Figure 20. Primary Interview Distribution by Region and Seniority

Figure 21. Value share by application, 2025

Figure 22. Growth rate by region, 2025-2031

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Executive summary

The global monoammonium phosphate market reached USD XXX billion in 2025 and will expand to USD XXX billion by 2031, advancing at a XX% CAGR. Agricultural fertilizers account for XX% of demand, supported by MAP's concentrated phosphorus content, compatibility with precision placement and suitability for low-ammonia-loss applications. Asia-Pacific leads with XX% of market value, while Latin America is the fastest-growing region at a XX% CAGR as Brazil, Argentina and neighboring crop exporters intensify phosphorus replacement. Supply remains moderately concentrated around vertically integrated phosphate-rock, phosphoric-acid and ammonia producers, making feedstock access, trade policy and logistics decisive competitive factors.

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

Key findings

- The global MAP market generated USD XXX billion in 2025 and will reach USD XXX billion in 2031.
- Global MAP volume totaled XXX tonnes in 2025 and will rise to XXX tonnes by 2031.
- Fertilizer-grade MAP represented XX% of 2025 market value, reflecting its central role in starter fertilizers, direct application and NPK blending.
- Asia-Pacific held XX% of global market value in 2025, led by China, India and Southeast Asian fertilizer demand.
- Latin America will record the fastest regional growth at XX% annually through 2031, driven principally by Brazilian soybean, maize, sugarcane and second-crop nutrient programs.
- The International Fertilizer Association reported that global MAP and DAP trade reached XXX tonnes in 2024.
- The U.S. Geological Survey recorded world fertilizer consumption of XXX tonnes of P2O5 in 2024 and projected XXX tonnes by 2028.
- PhosAgro reported XXX tonnes of combined DAP and MAP production in 2025, demonstrating the scale advantage of integrated phosphate producers.

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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 Monoammonium Phosphate Market Trends and Growth Drivers

MAP sits at the intersection of food production, mineral-resource security and international trade. Its agronomic value comes from concentrated, immediately available phosphorus combined with ammoniacal nitrogen, while its commercial value depends on access to phosphate rock, sulfur, ammonia, water, energy and export infrastructure. This creates a market in which farming fundamentals drive consumption but upstream integration determines the delivered cost curve.

The demand cycle is increasingly regional. Latin American row crops require growing import volumes, Asian governments prioritize domestic fertilizer availability, and European buyers are tightening contaminant and carbon criteria. Producers therefore compete through origin diversification, port inventory, flexible MAP-DAP-NPK manufacturing and specifications tailored to soil, crop and regulatory requirements.

Technology is changing the mix rather than displacing phosphorus demand. Soil testing, variable-rate application and band placement reduce inefficient use but favor consistent, high-analysis granules and soluble formulations. Over the forecast period, these practices support value growth through premium products even as nutrient-use efficiency moderates tonnes applied per hectare in mature markets.

Growth drivers

Grain and oilseed nutrient removal

Larger maize, wheat, rice, soybean and rapeseed harvests remove more phosphorus from cultivated soils and increase the need for replacement applications. MAP benefits from its high nutrient concentration and established role in pre-plant, banded and blended fertilizer programs, particularly in export-oriented farming systems.

Precision starter-fertilizer adoption

Banding and near-seed placement favor MAP because its localized ammonia release is lower than that of DAP and its granules provide concentrated phosphorus close to emerging roots. Adoption raises demand among large farms, no-till operators and growers seeking higher nutrient-use efficiency from each applied tonne.

Latin American double-cropping

Brazilian soybean and safrinha maize rotations intensify annual nutrient withdrawal and compress fertilizer-delivery windows. The resulting demand for concentrated, logistically efficient phosphate products supports MAP imports, port storage and inland blending investments.

Integrated export capacity expansion

Capacity additions and debottlenecking in Morocco, Saudi Arabia and Russia broaden merchant availability and improve access to high-growth import markets. Vertically integrated producers can optimize the MAP-

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DAP-NPK product mix as regional netbacks change, supporting supply resilience and commercial reach.

Specialty nutrition premiumization

Fertigation, greenhouse cultivation and high-value horticulture are expanding demand for purified, fully soluble phosphate products. Technical-grade MAP captures higher pricing through impurity control, rapid solubility and compatibility with precision dosing equipment.

Fire-suppression replacement demand

MAP remains the principal active ingredient in multipurpose ABC dry-chemical extinguishing powders used across commercial buildings, factories, vehicles and energy infrastructure. Expansion of regulated building stock and periodic extinguisher servicing creates stable, non-seasonal demand outside agriculture.

Restraints

Sulfur and ammonia cost volatility

MAP economics are directly exposed to sulfur-derived sulfuric acid, ammonia and phosphate-rock costs. Sudden input-price increases compress non-integrated producer margins and raise delivered fertilizer prices during critical procurement windows.

Trade-policy fragmentation

Countervailing duties, sanctions, licensing practices and domestic-supply measures alter established phosphate trade lanes. Importers respond by carrying larger inventories and diversifying origin, increasing working-capital and freight costs throughout the merchant market.

Farmer affordability pressure

High phosphate prices relative to grain and oilseed revenue encourage application deferral, soil-reserve mining and substitution toward lower-analysis products. Demand is most exposed in price-sensitive rain-fed farming systems and markets with restricted agricultural credit.

Phosphorus-loss regulation

Nutrient-management plans, application setbacks and water-quality rules constrain excessive phosphorus use in environmentally sensitive watersheds. These measures reduce blanket application while shifting demand toward soil testing, targeted placement and higher-efficiency formulations.

Long upstream development cycles

New phosphate mines and integrated chemical complexes require extensive capital, infrastructure, water access, permitting and residue-management systems. Extended lead times limit rapid supply responses and can delay regional market development.

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Monoammonium Phosphate Market Driver and Restraint Impact on the Forecast

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Grain and oilseed nutrient removal	XXX	XXX	XXX
Precision starter-fertilizer adoption	XXX	XXX	XXX
Latin American double-cropping	XXX	XXX	XXX
Integrated export capacity expansion	XXX	XXX	XXX
Specialty nutrition premiumization	XXX	XXX	XXX
Fire-suppression replacement demand	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Sulfur and ammonia cost volatility	XXX	XXX	XXX
Trade-policy fragmentation	XXX	XXX	XXX
Farmer affordability pressure	XXX	XXX	XXX
Phosphorus-loss regulation	XXX	XXX	XXX
Long upstream development cycles	XXX	XXX	XXX

Source: XXX

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Monoammonium Phosphate Market Segmentation Analysis

By Grade

Fertilizer-grade MAP dominates because global consumption is centered on direct field application and bulk NPK blending. Technical and purified grades serve fire suppression, fertigation, food processing and industrial chemistry, where tighter impurity, solubility and particle-size specifications support premium pricing. Purified technical grade will record the fastest growth as controlled-environment agriculture and specialty industrial applications expand.

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
Technical and Purified Grade	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Form

Granules lead commodity fertilizer channels because they resist caking, travel efficiently through bulk logistics and blend uniformly with urea, potash and other dry nutrients. Powder and crystal products are concentrated in fire-extinguishing, industrial and high-purity uses. Solutions and fully soluble formulations grow fastest from a smaller base as fertigation and controlled dosing gain adoption.

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 Crystal	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Solution and Water-Soluble Formulations	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

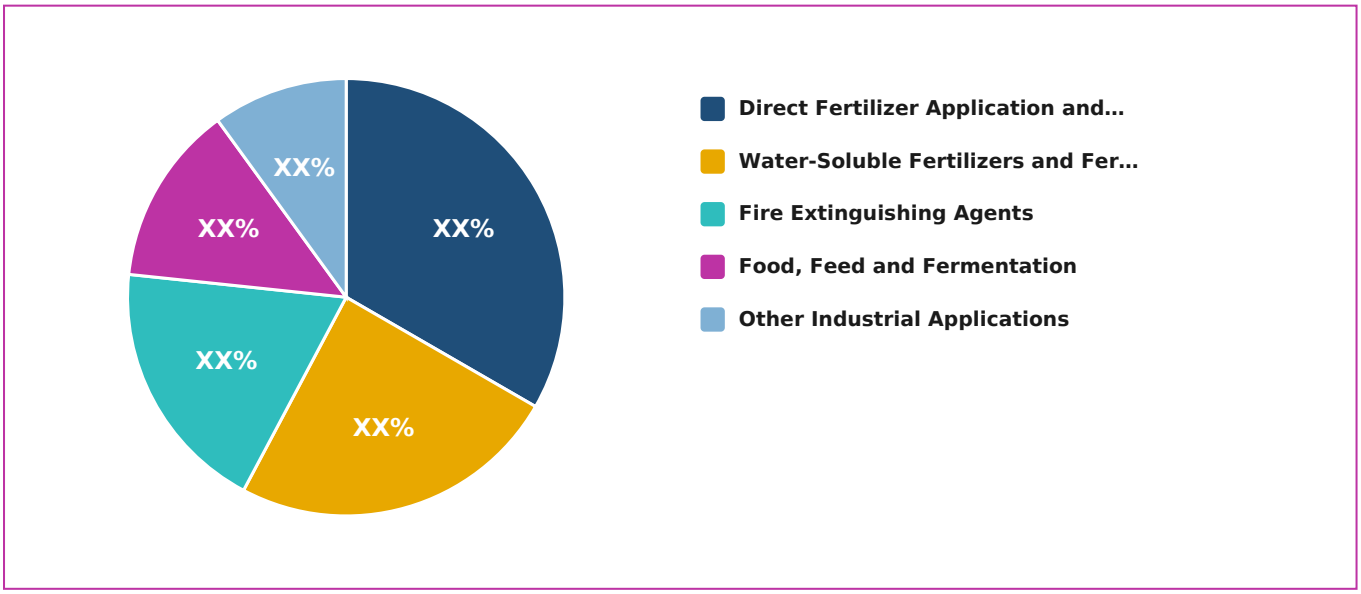
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By Application

Direct fertilizer application and NPK blending remain MAP's principal outlets, supported by high phosphorus concentration and favorable behavior in banded placement. Fire-extinguishing powder is the largest non-fertilizer application and benefits from recurring equipment servicing and building-safety requirements. Industrial, food, feed and fermentation uses are smaller but deliver higher value per tonne.

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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
Direct Fertilizer Application and Bulk Blending	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Water-Soluble Fertilizers and Fertigation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fire Extinguishing Agents	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food, Feed and Fermentation	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Other Industrial Applications	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Crop Type

Cereals lead through extensive maize, wheat and rice acreage and established starter-fertilizer programs. Oilseed demand is expanding faster as soybean, rapeseed and sunflower production grows in Brazil, the Black Sea region and the Americas. Fruits, vegetables and plantation crops support higher-value soluble MAP consumption through fertigation and intensive nutrient management.

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Value by crop Type, 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
Sugar and Plantation Crops	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Turf, Forage and Other Crops	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Distribution Channel

Direct contracts dominate high-volume fertilizer trade because buyers require vessel scheduling, port storage and pricing linked to international benchmarks. Distributors remain essential in fragmented farm markets, technical-grade applications and regions requiring credit extension. Digital and retail channels grow fastest but remain focused on small packs, soluble grades and specialty agriculture.

Value by distribution Channel, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Producer and Importer Sales	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Agricultural Cooperatives	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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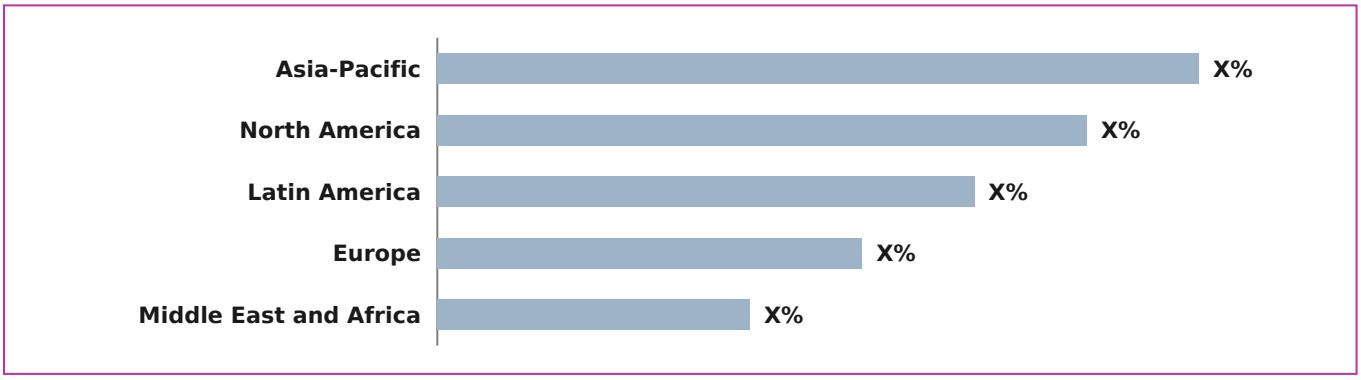
Monoammonium Phosphate Market Regional Analysis and Country Outlook

Asia-Pacific accounted for XX% of 2025 market value, supported by China's large phosphate conversion industry, India's subsidy-supported fertilizer system and rising nutrient demand across Southeast Asia. China is simultaneously the region's principal producer and the largest swing factor in seaborne availability because domestic supply priorities determine how much MAP reaches export markets. India remains more DAP-oriented but creates substantial indirect influence through phosphate import competition, subsidy decisions and the economics of alternative P2O5 products.

Latin America is forecast to expand at XX% annually through 2031, faster than every other region. Brazil anchors growth through soybean, maize, sugarcane and cotton nutrient removal, limited domestic phosphate self-sufficiency and extensive use of imported high-analysis fertilizers. Argentina, Paraguay and Bolivia add demand from oilseed and grain acreage, while port capacity, inland freight and distributor credit determine supplier access.

North America remains a high-value MAP market built around maize, wheat, oilseed and precision-placement systems, although mature application rates constrain volume growth. Europe prioritizes low-cadmium products, traceability and nutrient efficiency, while the Middle East and Africa gain strategic weight as production hubs led by Morocco and Saudi Arabia and as emerging African farming systems raise phosphorus application from a low base.

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
Latin America	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Europe	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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Monoammonium Phosphate Market Competitive Landscape and Company Share

The MAP market has moderate concentration at the global level and higher concentration within export corridors. OCP Group, The Mosaic Company, PhosAgro, Ma'aden and Nutrien combine rock access, phosphoric-acid production, granulation assets and export infrastructure, allowing them to switch product mix and preserve utilization through regional demand cycles. Chinese producers collectively represent substantial capacity but operate under a more fragmented corporate structure and stronger domestic-policy influence.

Competitive advantage is shifting toward integrated feedstock positions, flexible MAP-DAP-NPK lines, lower impurity profiles and control of port logistics. OCP's Jorf Lasfar investments, PhosAgro's Balakovo expansion, Ma'aden's phosphate growth program and Nutrien's Aurora mine-life extension illustrate the capital intensity required to maintain market position. Producers are also investing in sulfuric-acid reliability, phosphogypsum utilization and enriched products that command premiums over commodity MAP.

Portfolio restructuring and trade barriers are reshaping addressable markets. Mosaic exchanged its XX% interest in Ma'aden Wa'ad Al Shamal Phosphate Company for Ma'aden shares in 2024, while Nutrien began reviewing strategic alternatives for its phosphate business. U.S. duties on Moroccan and Russian phosphate fertilizers, China's domestic-supply measures and shifting Russian trade flows reinforce regional pricing differences and distributor demand for diversified supply.

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
Ma'aden	XXX	XXX	XXX	XXX
Nutrien Ltd.	XXX	XXX	XXX	XXX
EuroChem Group	XXX	XXX	XXX	XXX
ICL Group	XXX	XXX	XXX	XXX
Jordan Phosphate Mines Company	XXX	XXX	XXX	XXX
Coromandel International Limited	XXX	XXX	XXX	XXX
Paradeep Phosphates Limited	XXX	XXX	XXX	XXX

Source: XXX

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Monoammonium Phosphate Market Forecast and Strategic Opportunities

MAP demand will rise from XXX tonnes in 2025 to XXX tonnes in 2031 as crop nutrient removal, precision placement and expansion of fertilizer use in emerging agricultural systems outweigh efficiency-led reductions in application intensity. Market value will grow faster than volume over the full cycle because new capacity carries higher capital, environmental and logistics costs and specialty grades increase their mix contribution.

The central forecast assumes continued capacity ramp-up in North Africa and the Middle East, constrained Chinese export availability, stable long-run crop acreage and periodic fertilizer-affordability corrections. A high-growth scenario emerges if grain and oilseed prices strengthen alongside faster Brazilian acreage growth; the downside scenario is defined by prolonged weak farm margins, accelerated phosphorus-use efficiency and earlier-than-planned export capacity additions.

Winning suppliers will combine dependable seasonal delivery with flexible product specifications, credit support and agronomic differentiation. Low-cadmium MAP, micronutrient-enriched granules, sulfur-enhanced products and water-soluble grades will outgrow standard commodity formulations, while carbon accounting and residue management become routine tender criteria in Europe and multinational food supply chains.

Opportunities

- Low-cadmium and traceable MAP for regulated European supply chains
- Micronutrient-enriched and sulfur-enhanced MAP formulations
- Port-side granulation, blending and storage capacity in Brazil and Southeast Asia
- Industrial and food-grade MAP purification
- Recovered-phosphorus integration and lower-carbon production routes
- Digital soil testing and prescription-based phosphorus 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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