

Global Monoammonium Phosphate 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 25.1 bn
CAGR (2021-2031)	5%
Study period	2021-2031
Largest region	Asia-Pacific · 47.2%
Fastest-growing region	Latin America · 6.2%
Market concentration	Moderate
Licence	Individual / Company

The global monoammonium phosphate market reached USD XXX billion in 2025 and is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Agricultural fertilizer accounted for XX% of market value, supported by MAP's concentrated phosphorus content, compatibility with compound-fertilizer systems and suitability for phosphorus-responsive crops. Asia-Pacific held XX% of global demand, while Latin America is forecast to grow fastest at XX% annually as Brazil expands soybean, maize and second-crop fertilizer application. Supply remains concentrated around integrated phosphate-rock, phosphoric-acid and ammonia platforms operated by OCP Group, Mosaic, PhosAgro, EuroChem, Ma'aden and leading Chinese producers.

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Table of contents

1 Introduction

1.1 Study Scope and Objectives

1.2 Monoammonium Phosphate Market Definition

1.3 Product Chemistry and Commercial Specifications

1.4 Inclusions, Exclusions and Currency 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 Assumptions

3 Executive Summary

3.1 Global Market Size and Forecast

3.2 Segment and Regional Highlights

3.3 Strategic Takeaways

4 Industry Structure and Supply Chain

4.1 Phosphate Rock, Sulfur, Ammonia and Phosphoric Acid Inputs

4.2 MAP Production Process and Cost Structure

4.3 Trade Flows, Logistics and Seasonality

4.4 Pricing Formation and Contracting Practices

5 Monoammonium Phosphate Market Dynamics

5.1 Market Drivers

5.2 Market Restraints

5.3 Market Opportunities

5.4 Driver and Restraint Impact Analysis

5.5 Porter's Five Forces Analysis

5.5.1 Supplier Power

5.5.2 Buyer Power

5.5.3 Threat of New Entrants

5.5.4 Threat of Substitutes

5.5.5 Competitive Rivalry

6 Global Market Size and Forecast, 2021-2031

6.1 Market Value Forecast

6.2 Market Volume Forecast

6.3 Pricing and Capacity Utilization

6.4 Baseline, High and Low Scenarios

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7 Market Size and Forecast by Application

7.1 Agricultural Fertilizer

7.2 Fire Retardants and Extinguishing Agents

7.3 Food and Feed Processing

7.4 Fermentation and Other Industrial Uses

8 Market Size and Forecast by Physical Form

8.1 Granular MAP

8.2 Powder MAP

8.3 Crystalline Water-Soluble MAP

9 Agricultural MAP Market by Crop Use and Route to Market

9.1 Cereals and Grains

9.2 Oilseeds and Pulses

9.3 Fruits and Vegetables

9.4 Sugar, Fiber and Other Crops

9.5 Direct Bulk Contracts

9.6 Distributors, Retail and Digital Channels

10 Monoammonium Phosphate Market Regional Analysis

10.1 Asia-Pacific

10.1.1 China

10.1.2 India

10.1.3 Indonesia

10.1.4 Vietnam

10.1.5 Australia

10.1.6 Rest of Asia-Pacific

10.2 North America

10.2.1 United States

10.2.2 Canada

10.2.3 Mexico

10.3 Europe

10.3.1 Russia

10.3.2 France

10.3.3 Germany

10.3.4 Spain

10.3.5 Rest of Europe

10.4 Latin America

10.4.1 Brazil

10.4.2 Argentina

10.4.3 Chile

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10.4.4 Rest of Latin America
10.5 Middle East and Africa
10.5.1 Morocco
10.5.2 Saudi Arabia
10.5.3 South Africa
10.5.4 Rest of Middle East and Africa
11 Competitive Landscape
11.1 Market Concentration and Company Share
11.2 Capacity, Integration and Cost Benchmarking
11.3 Recent Developments and Strategic Projects
11.4 Company Profiles
11.4.1 OCP Group
11.4.2 The Mosaic Company
11.4.3 PhosAgro
11.4.4 EuroChem Group
11.4.5 Ma'aden
11.4.6 ICL Group
11.4.7 Yunnan Yuntianhua Co., Ltd.
11.4.8 Guizhou Phosphate Chemical Group
11.4.9 Jordan Phosphate Mines Company
11.4.10 Itafos Inc.
12 Regulation, Sustainability and Trade Policy
12.1 Fertilizer Standards and Cadmium Limits
12.2 Carbon Regulation and Producer Decarbonization
12.3 Trade Remedies and Export Controls
13 Forecast Opportunities and Strategic Recommendations
13.1 Regional Opportunity Pools
13.2 Water-Soluble and Specialty MAP
13.3 Low-Carbon MAP and Circular Phosphorus
13.4 Strategic Recommendations by Stakeholder

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List of tables

Table 1. Global MAP Market Snapshot, 2021, 2025 and 2031

Table 2. Key Segment Leaders, Shares and Forecast CAGRs

Table 3. Executive Opportunity and Risk Matrix

Table 4. MAP Product Chemistry, Nutrient Analysis and Commercial Specifications

Table 5. MAP Value Chain Participants and Margin Pools

Table 6. Phosphate Rock, Sulfur, Ammonia and Energy Cost Sensitivity

Table 7. Principal Global MAP Trade Corridors and Seasonal Windows

Table 8. MAP Market Drivers by Impact, Geography and Horizon

Table 9. MAP Market Restraints by Impact, Geography and Horizon

Table 10. MAP Market Opportunities by Addressable Value and Timing

Table 11. Regulatory and Trade-Policy Impact Matrix

Table 12. Global MAP Market Value by Year, 2021-2031

Table 13. Global MAP Market Volume by Year, 2021-2031

Table 14. Global MAP Average Realized Price by Year, 2021-2031

Table 15. Global MAP Supply, Demand and Capacity Utilization Balance

Table 16. Baseline, High-Growth and Low-Growth Forecast Scenarios

Table 17. MAP Market Value and Volume by Application, 2021-2031

Table 18. MAP Market Value and Volume by Physical Form, 2021-2031

Table 19. Agricultural MAP Value and Volume by Crop Use, 2021-2031

Table 20. MAP Market Value and Volume by Route to Market, 2021-2031

Table 21. Segment Share, Price Premium and CAGR Benchmark

Table 22. MAP Market Value and Volume by Region, 2021-2031

Table 23. Asia-Pacific MAP Market by Country, 2021-2031

Table 24. North America MAP Market by Country, 2021-2031

Table 25. Europe MAP Market by Country, 2021-2031

Table 26. Latin America MAP Market by Country, 2021-2031

Table 27. Middle East and Africa MAP Market by Country, 2021-2031

Table 28. Global MAP Producer Share and Capacity Benchmark, 2025

Table 29. Competitive Positioning by Rock, Acid, Ammonia and Logistics Integration

Table 30. MAP Capacity Additions, Curtailments and Strategic Projects, 2024-2031

Table 31. OCP Group Company Profile

Table 32. The Mosaic Company Profile

Table 33. PhosAgro Company Profile

Table 34. EuroChem Group Company Profile

Table 35. Ma'aden Company Profile

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Table 36. ICL Group Company Profile

Table 37. Yunnan Yuntianhua Company Profile

Table 38. Guizhou Phosphate Chemical Group Company Profile

Table 39. Jordan Phosphate Mines Company Profile

Table 40. Itafos Company Profile

Table 41. MAP Fertilizer Standards and Labelling Requirements by Major Market

Table 42. Tariffs, Countervailing Duties and Export Controls Affecting MAP

Table 43. Cadmium, Emissions, Water and Phosphogypsum Compliance Matrix

Table 44. Producer Decarbonization Targets and Green-Capex Programmes

Table 45. MAP Revenue Opportunity Pools by Region, 2025-2031

Table 46. Specialty and Water-Soluble MAP Opportunity Assessment

Table 47. Strategic Priorities for Producers, Traders and Buyers

Table 48. Market value by year, USD bn

Table 49. Year-over-year value change

Table 50. Drivers — impact on forecast

Table 51. Restraints — impact on forecast

Table 52. Value by application, USD bn

Table 53. Value by physical Form, USD bn

Table 54. Value by agricultural Crop Use, USD bn

Table 55. Value by route to Market, USD bn

Table 56. Market value by region, USD bn

Table 57. Market value by leading country, USD bn

Table 58. Leading companies

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List of figures

Figure 1. Global Monoammonium Phosphate Market Value, 2021-2031

Figure 2. Global MAP Market Value and Volume Growth Index, 2021-2031

Figure 3. MAP Production Cost Structure by Input Category, 2025

Figure 4. Indicative Delivered MAP Cost by Producer Archetype

Figure 5. Driver and Restraint Impact on MAP Market CAGR

Figure 6. MAP Demand Sensitivity to Crop and Fertilizer Price Scenarios

Figure 7. Global MAP Revenue Forecast, 2021-2031

Figure 8. Global MAP Volume Forecast, 2021-2031

Figure 9. MAP Market Value Under Baseline, High and Low Scenarios, 2026-2031

Figure 10. MAP Market Share by Application, 2025

Figure 11. MAP Market Share by Physical Form, 2025

Figure 12. MAP Segment CAGR Comparison, 2025-2031

Figure 13. Global MAP Market Share by Region, 2025

Figure 14. MAP Market CAGR by Region, 2025-2031

Figure 15. Incremental MAP Demand by Region, 2025-2031

Figure 16. Global MAP Producer Market Share, 2025

Figure 17. Leading MAP Producers by Integration and Geographic Reach

Figure 18. MAP Embedded-Emissions Reduction Pathways

Figure 19. MAP Opportunity Attractiveness by Segment and Region

Figure 20. Value share by application, 2025

Figure 21. Value share by physical Form, 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 is forecast to attain USD XXX billion by 2031, expanding at a XX% CAGR. Agricultural fertilizer accounted for XX% of market value, supported by MAP's concentrated phosphorus content, compatibility with compound-fertilizer systems and suitability for phosphorus-responsive crops. Asia-Pacific held XX% of global demand, while Latin America is forecast to grow fastest at XX% annually as Brazil expands soybean, maize and second-crop fertilizer application. Supply remains concentrated around integrated phosphate-rock, phosphoric-acid and ammonia platforms operated by OCP Group, Mosaic, PhosAgro, EuroChem, Ma'aden and leading Chinese producers.

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

Key findings

- Global monoammonium phosphate demand reached XXX tonnes and USD XXX billion in 2025.
- The market is forecast to reach XXX tonnes and USD XXX billion by 2031, representing a XX% value CAGR.
- Agricultural fertilizer applications generated XX% of 2025 market value.
- Granular MAP held XX% of market value because bulk field application and dry blending dominate global consumption.
- Asia-Pacific represented XX% of 2025 value, led by China, India and Southeast Asian crop-nutrition demand.
- Latin America is forecast to expand at a XX% CAGR through 2031, with Brazil accounting for the majority of incremental regional demand.
- FAOSTAT recorded XXX tonnes of global inorganic fertilizer nutrient use in 2023, including XXX tonnes of phosphorus expressed as P2O5.
- The U.S. Geological Survey estimated XXX tonnes of world phosphate-rock mine production in 2025 and XXX tonnes of reserves.

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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 security, mined mineral supply and global energy markets. Demand follows planted area, crop prices and soil nutrient replacement, while production economics depend on phosphate-rock quality, sulfuric and phosphoric acid integration, ammonia availability and freight. This structure gives vertically integrated producers a durable advantage and makes internationally traded supply responsive to operating disruptions and trade policy.

The market is transitioning from a purely commodity model toward differentiated nutrition platforms. Granule consistency, low contaminant content, water solubility, embedded emissions and agronomic support increasingly influence procurement alongside nutrient analysis and delivered price. Specialty MAP remains a minority of total tonnage but contributes a growing share of industry margin.

Regional imbalance defines trade flows. Morocco, China, Russia, Saudi Arabia and the United States possess large production platforms, while Brazil, India and multiple Southeast Asian markets require substantial imported phosphate. Investments in Brazil and the Middle East reduce selected deficits without eliminating the strategic importance of ports, shipping lanes and seasonal inventory.

Growth drivers

Rising crop nutrient removal

Large grain and oilseed harvests remove substantial phosphorus from soils, requiring regular replacement to protect yields. MAP benefits from high nutrient concentration, rapid granule dissolution and efficient placement near developing roots, making it a preferred starter and maintenance fertilizer.

Brazilian soybean and maize intensification

Brazilian growers are increasing double-cropping, converting pasture and lifting fertilizer intensity across the Cerrado. Acidic, phosphorus-fixing soils favor concentrated phosphate application, supporting imported and locally produced MAP through ports, inland blenders and integrated distribution networks.

High-analysis fertilizer substitution

MAP transports more plant nutrient per tonne than lower-analysis phosphate products, reducing freight, handling and storage requirements. This advantage strengthens when ocean freight and inland logistics are expensive and supports substitution in modern blending operations.

Fertigation and protected cultivation

Water-soluble crystalline MAP supplies readily available nitrogen and phosphorus without introducing chloride. Greenhouse vegetables, orchards and drip-irrigated crops are expanding the premium-grade market, particularly in China, India, the Mediterranean and Latin America.

Integrated capacity investment

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OCP Group, Ma'aden, PhosAgro and EuroChem are investing in mines, acids, utilities and flexible granulation assets. These projects widen product availability, improve conversion efficiency and create supply capable of serving structurally import-dependent regions.

Food-security support programmes

Fertilizer subsidies, seasonal procurement and agricultural credit programmes sustain phosphate use in India, China and several emerging markets. The programmes reduce demand destruction during price spikes and prioritize domestic availability of high-analysis products.

Restraints

Sulfur and ammonia cost volatility

MAP economics depend on sulfur-derived sulfuric acid, phosphoric acid and ammonia. Shipping disruption, refinery sulfur availability and natural-gas-linked ammonia costs can force production curtailments and compress margins at non-integrated plants.

Farmer affordability pressure

Elevated fertilizer prices relative to crop revenue encourage growers to defer maintenance phosphorus or reduce application rates. Demand is most sensitive among credit-constrained producers and on rented land where the long-term soil benefit is difficult to capture.

Export and trade restrictions

Export inspection controls, duties, sanctions and countervailing measures redirect MAP flows and widen regional price spreads. Importers respond by carrying more inventory and diversifying origins, raising working-capital and logistics costs.

Environmental compliance burden

Phosphogypsum management, water use, cadmium limits and carbon-accounting obligations require additional processing and capital. High-cost or poorly integrated facilities face a greater risk of curtailment as buyers favor traceable, lower-emission supply.

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Monoammonium Phosphate Market Driver and Restraint Impact

Drivers — impact on forecast

Driver	Impact on CAGR	Geography	Horizon
Rising crop nutrient removal	XXX	XXX	XXX
Brazilian soybean and maize intensification	XXX	XXX	XXX
High-analysis fertilizer substitution	XXX	XXX	XXX
Fertigation and protected cultivation	XXX	XXX	XXX
Integrated capacity investment	XXX	XXX	XXX
Food-security support programmes	XXX	XXX	XXX

Source: XXX

Restraints — impact on forecast

Restraint	Impact on CAGR	Geography	Horizon
Sulfur and ammonia cost volatility	XXX	XXX	XXX
Farmer affordability pressure	XXX	XXX	XXX
Export and trade restrictions	XXX	XXX	XXX
Environmental compliance burden	XXX	XXX	XXX

Source: XXX

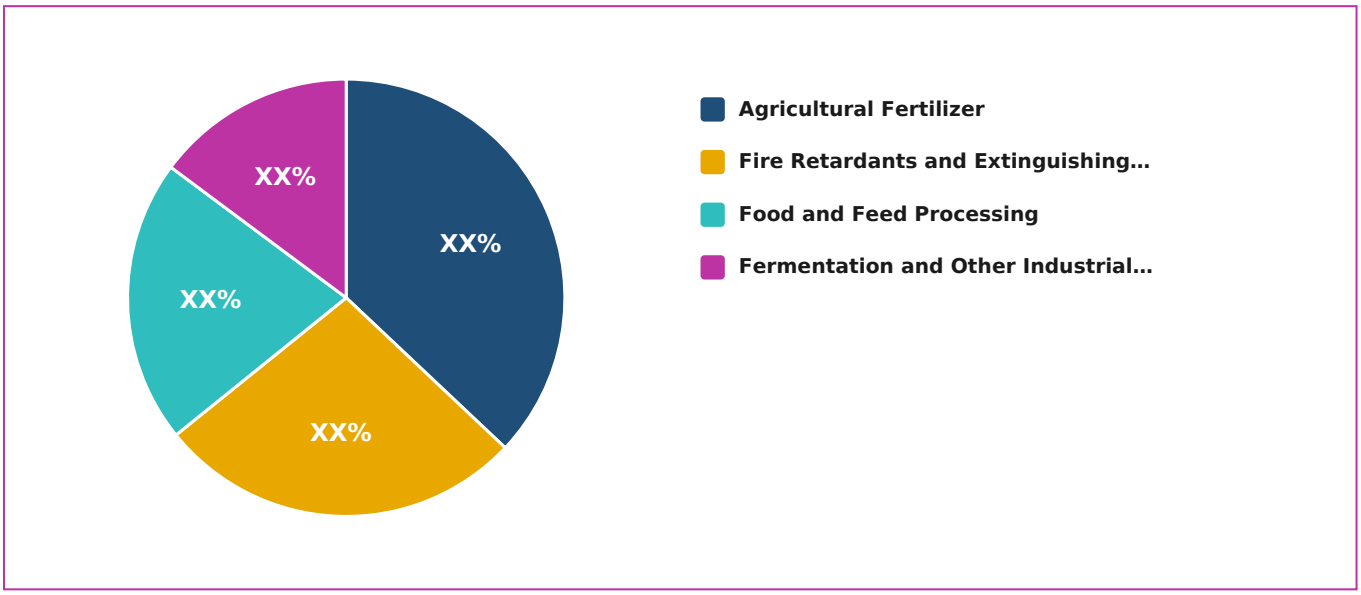
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Monoammonium Phosphate Market Segmentation Analysis

By Application

Field-applied fertilizer dominates because MAP supplies concentrated, readily available phosphorus together with ammonium nitrogen and performs effectively in bands and bulk blends. Fire retardants and extinguishing powders form the largest non-agricultural use. Fermentation, food, feed and technical processes grow from smaller bases and demand tighter purity specifications.

Value share by application, 2025



Source: XXX

Value by application, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Agricultural Fertilizer	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fire Retardants and Extinguishing Agents	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Food and Feed Processing	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Fermentation and Other Industrial Uses	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

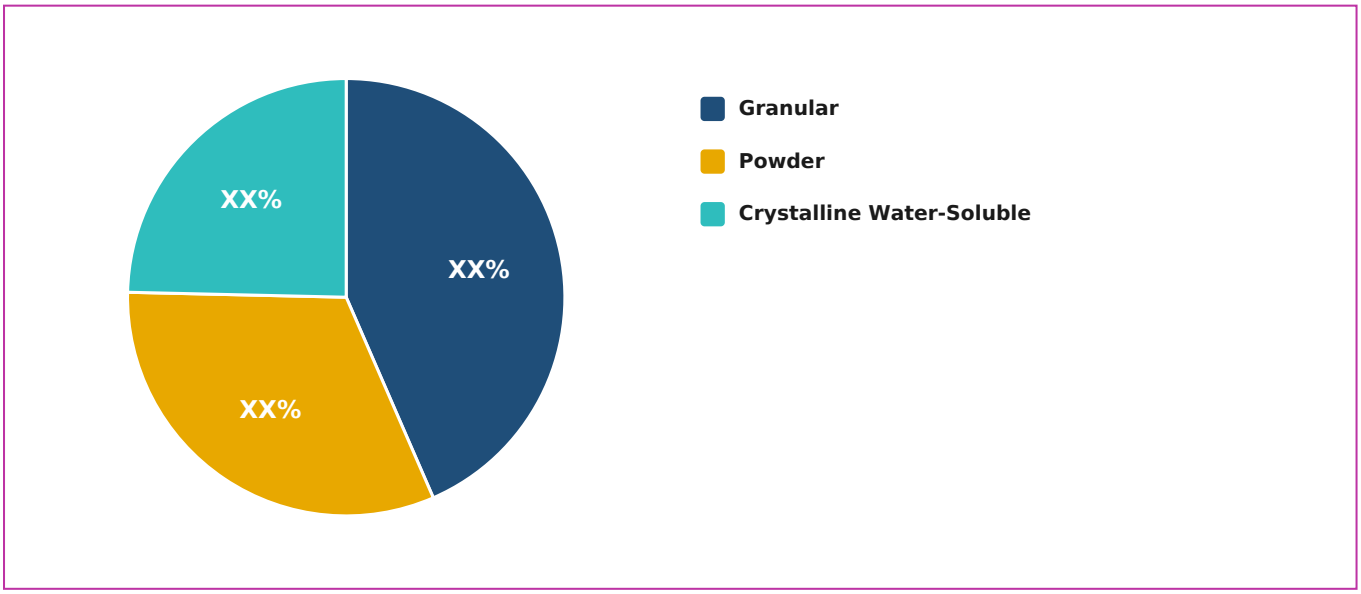
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By Physical Form

Granular MAP leads bulk agriculture because it stores, transports and blends efficiently and provides consistent spreading characteristics. Powdered grades serve fire-suppression, blending and industrial formulations. Fully water-soluble crystalline MAP is expanding at XX% annually as drip irrigation, hydroponics and protected horticulture increase.

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Value share by physical Form, 2025



Source: XXX

Value by physical Form, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Granular	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Powder	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Crystalline Water-Soluble	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

By Agricultural Crop Use

Cereals and grains lead through maize, wheat and rice nutrient programmes, particularly where MAP is placed at planting. Oilseeds are the fastest-growing major crop category as Brazilian soybean expansion and canola and sunflower intensification increase phosphorus removal. Fruit and vegetable applications support premium water-soluble demand and higher value per hectare.

Value by agricultural Crop Use, 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 Crops, Fiber Crops and Other Crops	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX

Source: XXX

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By Route to Market

Large importers, cooperatives, blenders and industrial buyers purchase MAP through direct contracts and cargo programmes, giving direct sales the largest share. Distributors remain essential in fragmented farming markets and for inland inventory positioning. Retail and digital channels are gaining share in specialty, water-soluble and small-package products.

Value by route to Market, USD bn

Segment	2026	2027	2028	2029	2030	2031	Share 2025	CAGR
Direct Bulk Contracts	XXX	XXX	XXX	XXX	XXX	XXX	XXX	XXX
Distributors and Wholesalers	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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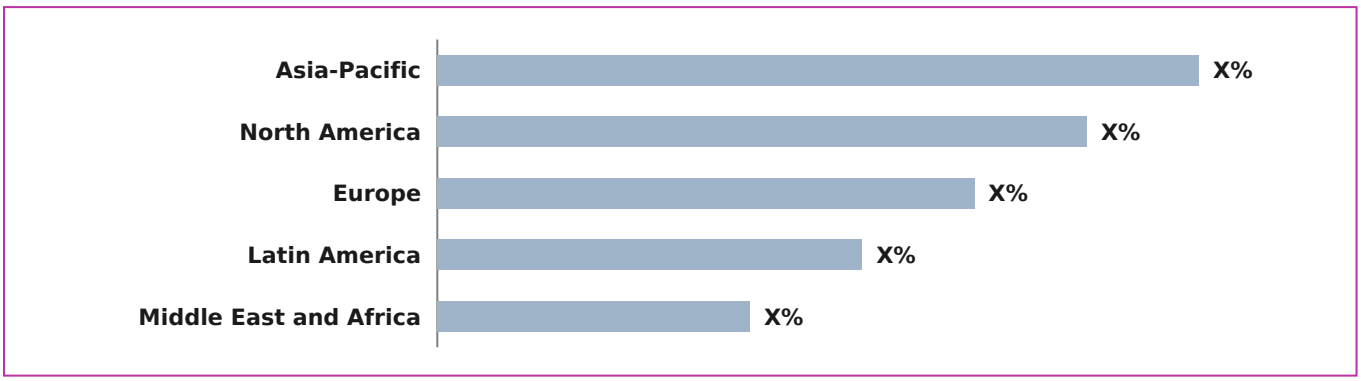
Monoammonium Phosphate Market Regional Analysis and Country Outlook

Asia-Pacific generated XX% of global MAP value in 2025. China combines the world's largest phosphate-processing base with substantial domestic grain and horticultural demand, although export approvals increasingly determine how much Chinese product reaches international buyers. India remains a major phosphatic-fertilizer importer and policy-driven demand center, while Indonesia, Vietnam, Thailand and Australia support additional consumption through plantation crops, rice, maize and broadacre agriculture.

Latin America is the fastest-growing region at a XX% CAGR through 2031. Brazil's soybean, maize, sugarcane and cotton systems require intensive phosphorus replacement, and the country's acidic soils sustain demand for concentrated phosphate products. EuroChem's Serra do Salitre complex adds local supply, but Brazil will remain a pivotal import market served by Morocco, Russia, North America, Saudi Arabia and China.

North America retains a large integrated production base led by Mosaic and Itafos, with demand linked to maize, wheat, oilseeds and dry fertilizer blending. Europe grows more slowly as nutrient-efficiency policy and mature cropped area temper volumes, although low-cadmium and lower-carbon products earn greater commercial importance. The Middle East and Africa combine export-oriented capacity in Morocco and Saudi Arabia with an expanding domestic requirement for cereal and horticultural productivity.

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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Monoammonium Phosphate Market Competitive Landscape and Company Share

The global MAP market has moderate concentration: the ten largest supplier groups represented XX% of merchant value in 2025. OCP Group, Mosaic, PhosAgro, EuroChem and Ma'aden form the leading international tier, supported by integrated access to phosphate rock and conversion assets. Chinese supply is individually fragmented but collectively decisive, with Yunnan Yuntianhua, Guizhou Phosphate Chemical and Hubei Xingfa among the prominent producers.

Competition is determined by rock quality, sulfur and ammonia procurement, acid integration, plant flexibility and delivered cost into Brazil, India and other deficit markets. Producers increasingly switch among MAP, DAP, NPS and NPK formulations to capture regional premiums. Specialty water-soluble grades, low-cadmium positioning, digital agronomy and direct-to-grower channels provide differentiation beyond commodity pricing.

Capacity strategy is moving toward fully integrated platforms. EuroChem is ramping the one-million-tonne-per-year Serra do Salitre phosphate complex in Brazil, PhosAgro is expanding flexible MAP/DAP/NPK/NPS output at Balakovo, and OCP Group is executing a USD XXX billion green investment programme. Mosaic is prioritizing operating discipline and higher-margin performance phosphates while retaining a strategic equity position in Ma'aden.

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
EuroChem Group	XXX	XXX	XXX	XXX
Ma'aden	XXX	XXX	XXX	XXX
ICL Group	XXX	XXX	XXX	XXX
Yunnan Yuntianhua Co., Ltd.	XXX	XXX	XXX	XXX
Guizhou Phosphate Chemical Group	XXX	XXX	XXX	XXX
Jordan Phosphate Mines Company	XXX	XXX	XXX	XXX
Itafos Inc.	XXX	XXX	XXX	XXX

Source: XXX

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Monoammonium Phosphate Market Forecast and Strategic Opportunities

Global MAP consumption will rise from XXX tonnes in 2025 to XXX tonnes in 2031. Volume expansion will be concentrated in Brazil, South and Southeast Asia, and selected African markets, while value growth will also reflect higher specifications, carbon costs and a richer mix of water-soluble and enhanced-efficiency products.

The baseline forecast assumes firm crop nutrient replacement, progressive normalization of sulfur logistics and controlled additions of integrated phosphate capacity. A high-growth scenario driven by strong grain economics, faster Brazilian acreage expansion and stable export availability would lift 2031 value to USD XXX billion; a low-growth scenario combining weak crop prices, persistent input inflation and tighter trade controls would hold value to USD XXX billion.

Winning suppliers will secure low-cost rock, diversify ammonia and sulfur sourcing, maintain flexible product slates and build regional inventory near major crop belts. Buyers will place greater value on reliable delivery, verified product quality, low contaminant levels and auditable embedded emissions, gradually shifting procurement from spot cargoes toward structured supply partnerships.

Opportunities

- Low-carbon MAP produced with renewable power and green ammonia
- Low-cadmium fertilizer grades for European and premium food-chain markets
- Water-soluble MAP for drip irrigation and greenhouse cultivation
- Local production and granulation capacity in import-dependent agricultural economies
- Digital nutrient recommendations and crop-specific MAP blends
- Recovery of phosphorus from secondary feedstocks

> 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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