

Mining Grade Ammonium Nitrate Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Sales Channel (Direct, and Indirect), By End Use (Mining, Quarrying, Construction and Demolition, Others), By Region and Competition, 2020-2030F

Market Report | 2025-08-25 | 184 pages | TechSci Research

AVAILABLE LICENSES:

- Single User License \$4500.00
- Multi-User License \$5500.00
- Custom Research License \$8000.00

Report description:

Market Overview

Global Mining Grade Ammonium Nitrate Market was valued at USD 3.10 Billion in 2024 and is expected to reach USD 3.85 Billion by 2030 with a CAGR of 3.87% during the forecast period. The global mining grade ammonium nitrate market plays a pivotal role in the mining industry, providing the essential ingredient for explosives used in various mining operations. This sector is characterized by its close ties to mining activities, construction, and infrastructure development. In this article, we will provide a comprehensive market overview of global mining grade ammonium nitrate, delving into its applications, market size, growth trends, and key players in the industry.

Mining grade ammonium nitrate is a chemical compound primarily used in the mining industry for its explosive properties. It consists of ammonium nitrate, a white crystalline substance, combined with various additives to enhance its stability and performance. This compound is a critical component in the manufacturing of explosives used for rock fragmentation, excavation, and other mining-related activities. The primary application of mining grade ammonium nitrate is in explosives used for mining and construction purposes. Mining grade ammonium nitrate is a core ingredient in the production of ANFO (Ammonium Nitrate Fuel Oil) explosives, which are widely used for controlled blasting in mining and quarrying.

Key Market Drivers

Rapid Expansion of Mining Industry

The rapid expansion of the mining industry is a major factor contributing significantly to the growth of the mining grade ammonium nitrate market. This expansion drives the demand for explosives, with mining grade ammonium nitrate being a crucial component in explosive formulations used in various mining operations. The mining industry is essential for the extraction of

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

valuable minerals, metals, and aggregates that are used in various industries, including construction, manufacturing, and technology. As the global demand for these resources rises, mining companies need to increase production, leading to more mining operations. The extraction of minerals and ores often involves drilling, blasting, and excavation, where explosives are used to break through rock and access valuable deposits. Mining grade ammonium nitrate is a primary ingredient in the production of explosives, such as ANFO (Ammonium Nitrate Fuel Oil), that are commonly used in these operations.

In India, iron ore, representing approximately 70% of the total mineral output by value under the Mineral Conservation and Development Rules (MCDR) achieved record production of 289 million metric tons (MMT) in FY 2024-25, marking a 4.3% increase over the previous year. Manganese ore production also surged by 11.8% to reach 3.8 MMT, while bauxite output rose by 2.9% to 24.7 MMT. Lead concentrate production grew by 3.1%, reaching 393 thousand tonnes, and primary aluminium production reached 4.2 million tonnes, surpassing the previous year's record. Refined copper showed particularly strong growth, increasing by 12.6% to 573,000 tonnes. These production increases signal a significant rise in mining activity across both ferrous and non-ferrous segments, which in turn boosts the demand for mining-grade ammonium nitrate widely used in blasting operations essential for mineral extraction. Similarly, in Australia's Northern Territory, eight major mines are expected to generate over USD 224 million in royalties by FY 2025-26, with several undergoing expansion and development of new processing facilities. The focus on metals such as manganese, copper, gold, zinc, and bauxite underscores the growing scale of mining operations globally, reinforcing the strong outlook for the mining-grade ammonium nitrate market.

Key Market Challenges

Safety regulations and compliance

Safety regulations and compliance pose significant challenges for the global mining grade ammonium nitrate market. While these regulations are essential for ensuring the safe handling and use of explosives, they can also impact the market's growth and operations.

Regulatory agencies around the world impose strict safety standards on the manufacturing, storage, transportation, and use of mining grade ammonium nitrate. Meeting these standards requires substantial investments in safety measures and equipment. Obtaining the necessary permits and regulatory approvals for the production, storage, and transportation of ammonium nitrate can be a complex and time-consuming process. Delays in permitting can disrupt operations and project timelines.

Ensuring compliance with safety regulations involves substantial costs related to safety training, equipment, and infrastructure upgrades. These costs can impact profit margins for both manufacturers and users of mining grade ammonium nitrate.

Workers involved in the production, handling, and use of ammonium nitrate must undergo extensive safety training. This requires ongoing investment in training programs and resources. The transportation of ammonium nitrate is subject to strict regulations, including packaging, labeling, and vehicle requirements. Ensuring compliance with these regulations can be logistically challenging and costly.

Regulatory agencies often require stringent security measures to prevent theft and misuse of ammonium nitrate. Implementing these security measures can be resource-intensive. In addition to safety regulations, environmental regulations are also a concern. Compliance with environmental standards is essential to prevent pollution and minimize the environmental impact of mining operations. Ammonium nitrate is sensitive to shock, heat, and friction, making it potentially hazardous. Accidents, such as explosions or chemical spills, can have devastating consequences and lead to legal and financial liabilities.

Key Market Trends

Shift Towards Safer Formulations

A key trend in the global mining grade ammonium nitrate market is a significant shift towards the development and adoption of safer formulations. As the industry prioritizes safety and environmental concerns, manufacturers are investing in research and innovation to create explosives with reduced hazards. These safer formulations aim to mitigate potential risks associated with the handling and use of ammonium nitrate-based explosives in mining and construction.

These efforts include enhancing stability, reducing sensitivity to shock and friction, and minimizing the environmental impact of explosives. The trend reflects a growing commitment to safety standards and sustainability practices, driven by stricter regulations and the need to address public and environmental concerns. Industry stakeholders are increasingly recognizing the importance of aligning their products with these safer formulations to meet evolving safety and environmental requirements while continuing to meet the growing demand for explosives in infrastructure development, resource extraction, and urbanization.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

projects.

Key Market Players

- Orica Limited
- Incitec Pivot Ltd.
- Austin Powder Company
- Sasol Chemical Industries Limited
- Sigdo Koppers SA
- Maxam Explosives Inc.

Report Scope:

In this report, the Global Mining Grade Ammonium Nitrate Market has been segmented into the following categories, in addition to the industry trends which have also been detailed below:

-□ Mining Grade Ammonium Nitrate Market, By Sales Channel:

- o Direct
- o Indirect

-□ Mining Grade Ammonium Nitrate Market, By End Use:

- o Mining
- o Quarrying
- o Construction and Demolition
- o Others

-□ Mining Grade Ammonium Nitrate Market, By Region:

- o Asia-Pacific
 - China
 - India
 - Japan
 - Australia
 - South Korea
- o North America
 - United States
 - Canada
 - Mexico
- o Europe
 - France
 - United Kingdom
 - Italy
 - Germany
 - Spain
- o South America
 - Brazil
 - Argentina
 - Colombia
- o Middle East & Africa
 - South Africa
 - Saudi Arabia
 - UAE
 - Kuwait
 - Egypt

Competitive Landscape

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Company Profiles: Detailed analysis of the major companies present in the Global Mining Grade Ammonium Nitrate Market.

Available Customizations:

Global Mining Grade Ammonium Nitrate market report with the given market data, TechSci Research offers customizations according to a company's specific needs. The following customization options are available for the report:

Company Information

-□ Detailed analysis and profiling of additional market players (up to five).

Table of Contents:

1. Product Overview
 - 1.1. Market Definition
 - 1.2. Scope of the Market
 - 1.2.1. Markets Covered
 - 1.2.2. Years Considered for Study
 - 1.2.3. Key Market Segmentations
2. Research Methodology
 - 2.1. Objective of the Study
 - 2.2. Baseline Methodology
 - 2.3. Key Industry Partners
 - 2.4. Major Association and Secondary Sources
 - 2.5. Forecasting Methodology
 - 2.6. Data Triangulation & Validation
 - 2.7. Assumptions and Limitations
3. Executive Summary
 - 3.1. Overview of the Market
 - 3.2. Overview of Key Market Segmentations
 - 3.3. Overview of Key Market Players
 - 3.4. Overview of Key Regions/Countries
 - 3.5. Overview of Market Drivers, Challenges, Trends
4. Impact of COVID-19 on Global Mining Grade Ammonium Nitrate Market
5. Voice of Customer
6. Global Mining Grade Ammonium Nitrate Market Outlook
 - 6.1. Market Size & Forecast
 - 6.1.1. By Value & Volume
 - 6.2. Market Share & Forecast
 - 6.2.1. By Sales Channel (Direct, and Indirect)
 - 6.2.2. By End Use (Mining, Quarrying, Construction and Demolition, Others)
 - 6.2.3. By Region
 - 6.2.4. By Company (2024)
 - 6.3. Market Map
7. Asia Pacific Mining Grade Ammonium Nitrate Market Outlook
 - 7.1. Market Size & Forecast
 - 7.1.1. By Value & Volume
 - 7.2. Market Share & Forecast
 - 7.2.1. By Sales Channel
 - 7.2.2. By End Use
 - 7.2.3. By Country
 - 7.3. Asia Pacific: Country Analysis

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 7.3.1. China Mining Grade Ammonium Nitrate Market Outlook
 - 7.3.1.1. Market Size & Forecast
 - 7.3.1.1.1. By Value & Volume
 - 7.3.1.2. Market Share & Forecast
 - 7.3.1.2.1. By Sales Channel
 - 7.3.1.2.2. By End Use
- 7.3.2. India Mining Grade Ammonium Nitrate Market Outlook
 - 7.3.2.1. Market Size & Forecast
 - 7.3.2.1.1. By Value & Volume
 - 7.3.2.2. Market Share & Forecast
 - 7.3.2.2.1. By Sales Channel
 - 7.3.2.2.2. By End Use
- 7.3.3. Australia Mining Grade Ammonium Nitrate Market Outlook
 - 7.3.3.1. Market Size & Forecast
 - 7.3.3.1.1. By Value & Volume
 - 7.3.3.2. Market Share & Forecast
 - 7.3.3.2.1. By Sales Channel
 - 7.3.3.2.2. By End Use
- 7.3.4. Japan Mining Grade Ammonium Nitrate Market Outlook
 - 7.3.4.1. Market Size & Forecast
 - 7.3.4.1.1. By Value & Volume
 - 7.3.4.2. Market Share & Forecast
 - 7.3.4.2.1. By Sales Channel
 - 7.3.4.2.2. By End Use
- 7.3.5. South Korea Mining Grade Ammonium Nitrate Market Outlook
 - 7.3.5.1. Market Size & Forecast
 - 7.3.5.1.1. By Value & Volume
 - 7.3.5.2. Market Share & Forecast
 - 7.3.5.2.1. By Sales Channel
 - 7.3.5.2.2. By End Use
- 8. Europe Mining Grade Ammonium Nitrate Market Outlook
 - 8.1. Market Size & Forecast
 - 8.1.1. By Value & Volume
 - 8.2. Market Share & Forecast
 - 8.2.1. By Sales Channel
 - 8.2.2. By End Use
 - 8.2.3. By Country
 - 8.3. Europe: Country Analysis
 - 8.3.1. France Mining Grade Ammonium Nitrate Market Outlook
 - 8.3.1.1. Market Size & Forecast
 - 8.3.1.1.1. By Value & Volume
 - 8.3.1.2. Market Share & Forecast
 - 8.3.1.2.1. By Sales Channel
 - 8.3.1.2.2. By End Use
 - 8.3.2. Germany Mining Grade Ammonium Nitrate Market Outlook
 - 8.3.2.1. Market Size & Forecast
 - 8.3.2.1.1. By Value & Volume

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 8.3.2.2. Market Share & Forecast
 - 8.3.2.2.1. By Sales Channel
 - 8.3.2.2.2. By End Use
- 8.3.3. Spain Mining Grade Ammonium Nitrate Market Outlook
 - 8.3.3.1. Market Size & Forecast
 - 8.3.3.1.1. By Value & Volume
 - 8.3.3.2. Market Share & Forecast
 - 8.3.3.2.1. By Sales Channel
 - 8.3.3.2.2. By End Use
- 8.3.4. Italy Mining Grade Ammonium Nitrate Market Outlook
 - 8.3.4.1. Market Size & Forecast
 - 8.3.4.1.1. By Value & Volume
 - 8.3.4.2. Market Share & Forecast
 - 8.3.4.2.1. By Sales Channel
 - 8.3.4.2.2. By End Use
- 8.3.5. United Kingdom Mining Grade Ammonium Nitrate Market Outlook
 - 8.3.5.1. Market Size & Forecast
 - 8.3.5.1.1. By Value & Volume
 - 8.3.5.2. Market Share & Forecast
 - 8.3.5.2.1. By Sales Channel
 - 8.3.5.2.2. By End Use
- 9. North America Mining Grade Ammonium Nitrate Market Outlook
 - 9.1. Market Size & Forecast
 - 9.1.1. By Value & Volume
 - 9.2. Market Share & Forecast
 - 9.2.1. By Sales Channel
 - 9.2.2. By End Use
 - 9.2.3. By Country
 - 9.3. North America: Country Analysis
 - 9.3.1. United States Mining Grade Ammonium Nitrate Market Outlook
 - 9.3.1.1. Market Size & Forecast
 - 9.3.1.1.1. By Value & Volume
 - 9.3.1.2. Market Share & Forecast
 - 9.3.1.2.1. By Sales Channel
 - 9.3.1.2.2. By End Use
 - 9.3.2. Mexico Mining Grade Ammonium Nitrate Market Outlook
 - 9.3.2.1. Market Size & Forecast
 - 9.3.2.1.1. By Value & Volume
 - 9.3.2.2. Market Share & Forecast
 - 9.3.2.2.1. By Sales Channel
 - 9.3.2.2.2. By End Use
 - 9.3.3. Canada Mining Grade Ammonium Nitrate Market Outlook
 - 9.3.3.1. Market Size & Forecast
 - 9.3.3.1.1. By Value & Volume
 - 9.3.3.2. Market Share & Forecast
 - 9.3.3.2.1. By Sales Channel
 - 9.3.3.2.2. By End Use

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 10. South America Mining Grade Ammonium Nitrate Market Outlook
 - 10.1. Market Size & Forecast
 - 10.1.1. By Value & Volume
 - 10.2. Market Share & Forecast
 - 10.2.1. By Sales Channel
 - 10.2.2. By End Use
 - 10.2.3. By Country
 - 10.3. South America: Country Analysis
 - 10.3.1. Brazil Mining Grade Ammonium Nitrate Market Outlook
 - 10.3.1.1. Market Size & Forecast
 - 10.3.1.1.1. By Value & Volume
 - 10.3.1.2. Market Share & Forecast
 - 10.3.1.2.1. By Sales Channel
 - 10.3.1.2.2. By End Use
 - 10.3.2. Argentina Mining Grade Ammonium Nitrate Market Outlook
 - 10.3.2.1. Market Size & Forecast
 - 10.3.2.1.1. By Value & Volume
 - 10.3.2.2. Market Share & Forecast
 - 10.3.2.2.1. By Sales Channel
 - 10.3.2.2.2. By End Use
 - 10.3.3. Colombia Mining Grade Ammonium Nitrate Market Outlook
 - 10.3.3.1. Market Size & Forecast
 - 10.3.3.1.1. By Value & Volume
 - 10.3.3.2. Market Share & Forecast
 - 10.3.3.2.1. By Sales Channel
 - 10.3.3.2.2. By End Use
- 11. Middle East and Africa Mining Grade Ammonium Nitrate Market Outlook
 - 11.1. Market Size & Forecast
 - 11.1.1. By Value & Volume
 - 11.2. Market Share & Forecast
 - 11.2.1. By Sales Channel
 - 11.2.2. By End Use
 - 11.2.3. By Country
 - 11.3. MEA: Country Analysis
 - 11.3.1. South Africa Mining Grade Ammonium Nitrate Market Outlook
 - 11.3.1.1. Market Size & Forecast
 - 11.3.1.1.1. By Value & Volume
 - 11.3.1.2. Market Share & Forecast
 - 11.3.1.2.1. By Sales Channel
 - 11.3.1.2.2. By End Use
 - 11.3.2. Saudi Arabia Mining Grade Ammonium Nitrate Market Outlook
 - 11.3.2.1.1. By Value & Volume
 - 11.3.2.2. Market Share & Forecast
 - 11.3.2.2.1. By Sales Channel
 - 11.3.2.2.2. By End Use
 - 11.3.3. Kuwait Mining Grade Ammonium Nitrate Market Outlook
 - 11.3.3.1. Market Size & Forecast

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

- 11.3.3.1.1. By Value & Volume
- 11.3.3.2. Market Share & Forecast
 - 11.3.3.2.1. By Sales Channel
 - 11.3.3.2.2. By End Use
- 11.3.4. Egypt Mining Grade Ammonium Nitrate Market Outlook
 - 11.3.4.1. Market Size & Forecast
 - 11.3.4.1.1. By Value & Volume
 - 11.3.4.2. Market Share & Forecast
 - 11.3.4.2.1. By Sales Channel
 - 11.3.4.2.2. By End Use
- 11.3.5. UAE Mining Grade Ammonium Nitrate Market Outlook
 - 11.3.5.1. Market Size & Forecast
 - 11.3.5.1.1. By Value & Volume
 - 11.3.5.2. Market Share & Forecast
 - 11.3.5.2.1. By Sales Channel
 - 11.3.5.2.2. By End Use
- 12. Market Dynamics
 - 12.1. Drivers
 - 12.2. Challenges
- 13. Market Trends & Developments
 - 13.1. Recent Developments
 - 13.2. Product Launches
 - 13.3. Mergers & Acquisitions
- 14. Global Mining Grade Ammonium Nitrate Market: SWOT Analysis
- 15. Pricing Analysis
- 16. PESTLE Analysis
- 17. Porter's Five Forces Analysis
 - 17.1. Competition in the Industry
 - 17.2. Potential of New Entrants
 - 17.3. Power of Suppliers
 - 17.4. Power of Customers
 - 17.5. Threat of Substitute Product
- 18. Competitive Landscape
 - 18.1. Orica Limited
 - 18.1.1. Business Overview
 - 18.1.2. Company Snapshot
 - 18.1.3. Products & Services
 - 18.1.4. Financials (As Reported)
 - 18.1.5. Recent Developments
 - 18.2. Incitec Pivot Ltd.
 - 18.3. Austin Powder Company
 - 18.4. Sasol Chemical Industries Limited
 - 18.5. Sigdo Koppers SA
 - 18.6. Maxam Explosives Inc.
- 19. Strategic Recommendations
- 20. About Us & Disclaimer

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Mining Grade Ammonium Nitrate Market - Global Industry Size, Share, Trends, Opportunity, and Forecast, Segmented By Sales Channel (Direct, and Indirect), By End Use (Mining, Quarrying, Construction and Demolition, Others), By Region and Competition, 2020-2030F

Market Report | 2025-08-25 | 184 pages | TechSci Research

To place an Order with Scotts International:

- Print this form
- Complete the relevant blank fields and sign
- Send as a scanned email to support@scotts-international.com

ORDER FORM:

Select license	License	Price
	Single User License	\$4500.00
	Multi-User License	\$5500.00
	Custom Research License	\$8000.00
		VAT
		Total

*Please circle the relevant license option. For any questions please contact support@scotts-international.com or 0048 603 394 346.

** VAT will be added at 23% for Polish based companies, individuals and EU based companies who are unable to provide a valid EU Vat Numbers.

Email*	<input type="text"/>	Phone*	<input type="text"/>
First Name*	<input type="text"/>	Last Name*	<input type="text"/>
Job title*	<input type="text"/>		
Company Name*	<input type="text"/>	EU Vat / Tax ID / NIP number*	<input type="text"/>
Address*	<input type="text"/>	City*	<input type="text"/>
Zip Code*	<input type="text"/>	Country*	<input type="text"/>

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com

Date

2026-03-04

Signature

A large, empty rectangular box intended for a signature.

Scotts International. EU Vat number: PL 6772247784

tel. 0048 603 394 346 e-mail: support@scotts-international.com

www.scotts-international.com