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Ammonium Nitrate - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts (2025 - 2030)

Market Report | 2025-09-01 | 120 pages | Mordor Intelligence

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Report description:

Ammonium Nitrate Market Analysis

The ammonium nitrate market size reached 51.23 million tons in 2025 and is forecast to climb to 63.24 million tons by 2030, reflecting a 4.30% CAGR over 2025-2030. Growth continues because the compound remains indispensable in crop nutrition and in bulk explosives that support large-scale mining and infrastructure work. The proliferation of regenerative farming in Europe, the rapid expansion of surface mining in Asia-Pacific, and technology upgrades in controlled blasting across North America are reinforcing demand. Parallel investments in green ammonia and low-carbon technical ammonium nitrate show that producers are positioning for climate-aligned growth while navigating cost pressure from volatile natural-gas markets and emergent transport restrictions.

Global Ammonium Nitrate Market Trends and Insights

Surge in Calcium-ammonium-nitrate Demand from Regenerative Farming Programs across Europe

European growers integrating regenerative practices are moving swiftly toward calcium ammonium nitrate to boost nitrogen-use efficiency and soil health. Regional field trials report yield gains of 0.65 t/ha over urea systems, supported by lower volatilization losses and improved nitrogen recovery. Digestate volumes projected at 75 million tons by 2030 complement CAN applications, reinforcing circular nutrient flows. As policymakers raise soil-carbon ambitions, CAN usage is expected to stay on an upward trajectory, amplifying medium-term demand visibility.

Expansion of ANFO and Emulsion Explosives in Large-Scale Surface Mining

Mining companies scaling up open-pit operations are increasing reliance on ANFO and novel emulsion blends that optimize fragmentation and lower powder factors. Field deployment of Orica's 4D Bulk System at Bloomfield Mine cut explosive strength by 20% yet kept productivity intact, illustrating how digital initiation and tailored energy distribution improve outcomes. Research on low-density emulsions shows that a 40:60 emulsion-to-EPS mix sharpens detonation velocity while curbing fume generation, providing an environmental edge in jurisdictions tightening blast-emission norms. These advances extend the life of high-grade ore bodies and position the ammonium nitrate market for long-term upside in resource-rich regions.

Substitute Products Eroding Traditional Demand

Market uptake of urea and organic-mineral fertilizers such as digestate is moderating growth prospects for conventional ammonium nitrate formulations. Production of digestate alone is forecast to hit 75 million tons in Europe by 2030, offering a locally sourced alternative that benefits from lower input costs and policy incentives around circular bioeconomy goals europeanbiogas.eu. Soil-health reports published in 2024 highlight a tipping point where rising prices for synthetic nitrogen, driven by geopolitical supply disruptions, accelerate farmer migration toward biologically derived nutrients. This headwind is expected to lower medium-term growth for the ammonium nitrate market in regions with ready access to substitute products.

Other drivers and restraints analyzed in the detailed report include:

Increasing Demand for Fertilizers in the Agricultural Sector / Rising Controlled-blasting Activity for Shale-Oil Pipeline Retrofits in North America / Natural-Gas Price Volatility Disrupting European Ammonia Economics /

For complete list of drivers and restraints, kindly check the Table Of Contents.

Segment Analysis

Porous prills retained a commanding 60% revenue position in 2024, owing to optimal oil-absorption properties for ANFO blends and uniform nutrient delivery in top-dress fertilization. Their low density reduces caking risk and improves spreadability, enabling large acreage coverage with standard farm machinery. Producers are refining prill-tower designs to limit dust and enhance strength, ensuring safer handling in humid climates.

Granular products, however, are the fastest-growing sub-category with a forecast 5.5% CAGR as vortex granulators deliver tighter particle-size distribution and reduced fines. Market adoption is notable among plantation crops where controlled nutrient release supports long growth cycles, adding diversity to the ammonium nitrate industry product mix.

Agricultural grade ammonium nitrate controlled 77% of revenue in 2024, anchored by its 34% nitrogen content and proven benefits in temperate as well as tropical agronomy. Cooperative buying programs and forward-pricing contracts shield farmers from spot-market volatility, sustaining demand even amid input-cost swings.

Simultaneously, industrial-grade volumes are projected to grow at 4.8% CAGR, driven by large-diameter borehole blasting in hard-rock mines and infrastructure mega-projects. Chemical pure ammonium nitrate variants are expanding into specialty oxidizing processes, including catalyst regeneration and advanced wastewater treatment, indicating growing vertical integration across the ammonium nitrate industry.

The Ammonium Nitrate Market Report is Segmented by Form (Porous Prills, Granular, and Liquid Solution/Suspension), Grade

(Agricultural Grade and Industrial Grade), Application (Fertilizers, Explosives, and Other Applications), End-User Industry (Agriculture, Mining, Defense, and Other End-User Industries), and Geography (Asia-Pacific, North America, Europe, South America, and Middle East and Africa).

Geography Analysis

Asia-Pacific accounted for 45.3% of global consumption in 2024 and is projected to record the fastest 4.98% CAGR to 2030. Government fertilizer-subsidy frameworks in India and China, combined with mine-development pipelines in Indonesia and Australia, create synchronized pull from both crop-nutrition and blasting segments.

North America remains anchored by expansive row-crop acreage in the United States and Canada alongside a vibrant hard-rock mining sector. Regulations mandate detailed documentation and carrier training for ammonium nitrate transport, encouraging adoption of purpose-built storage depots and real-time cargo-tracking systems.

Europe's share is being affected by energy-price volatility curtails regional ammonia output, yet the bloc is shaping global best practice in low-carbon production. The European Commission's Farm-to-Fork strategy targets reduced nutrient losses, prompting fertilizer producers to accelerate the adoption of tertiary nitrous-oxide abatement and renewable energy sourcing.

List of Companies Covered in this Report:

Abu Qir Fertilizers and Chemical Industries Company / Acron / Austin Powder / CF Industries Holdings, Inc. / Dyno Nobel / ENAEX / EuroChem Group / Fertiberia / Grupa Azoty / Hanwha Group / MAXAMCORP HOLDING, SL / Neochim Plc / OCI / Orica Limited / OSTCHEM / Qatar Fertiliser Company (Q.P.S.C) / San Corporation / Sasol / URALCHEM JSC / Yara /

Additional Benefits:

The market estimate (ME) sheet in Excel format /
3 months of analyst support /

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