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AFRICA FERTILIZER MAP 2019

AFRICA

MAP KEY

- DAP
- MAP
- TSP
- PHOSPHATE ROCK
- UREA
- NPK
- NPS
- MOP
- NORTHERN AFRICA
- WESTERN AFRICA
- CENTRAL AFRICA
- EASTERN AFRICA
- SOUTHERN AFRICA
- OCP AFRICA OFFICES, AGRONOMY AND LED PROJECTS
- IMPORT PORTS
- MANUFACTURING PLANTS
- MANUFACTURING PROJECTS
- BLENDING UNITS
- BLENDING PROJECTS
- EXPORTS
- IMPORTS
- MAJOR RAIL LINES
- TRADE CORRIDORS

Product trade flows are in '000 metric tonnes. MAP figures include NPs Cut off tonnage is 100,000 tonnes. Source: IFA 2017 data. Sub-Saharan NPKs imports include NPK, NP, NK and P compounds. NP imports above 10,000 tonnes have been disclosed separately. Source: IFDC/AFAP 2017 data. Morocco exports to Africa. NPKs/NPs figures include NPKSB, NPKSBZn, NPSB and NPSBZn. Source: OCP Africa 2017 data. Trade corridors, major rail lines. Source: AFO, OCP, Impala Terminals

MOROCCO	IFA data (Mt product)	
	2017	2022
Capacity in P205		
Phosphoric Acid	6.7	8.4
DAP/MAP/TSP	4.7	7.2
Exports		
Phosphate Rock	11.0	
DAP	2.3	
MAP	3.6	
TSP	1.1	
Imports		
Ammonia	1.6	
MOP	0.4	

ALGERIA	IFA data (Mt product)	
	2017	2022
Capacity		
Urea	3.6	3.6
Ammonia	3.9	4.2
Exports		
Urea	1.3	
Phosphate Rock	1.0	
Ammonia	1.2	

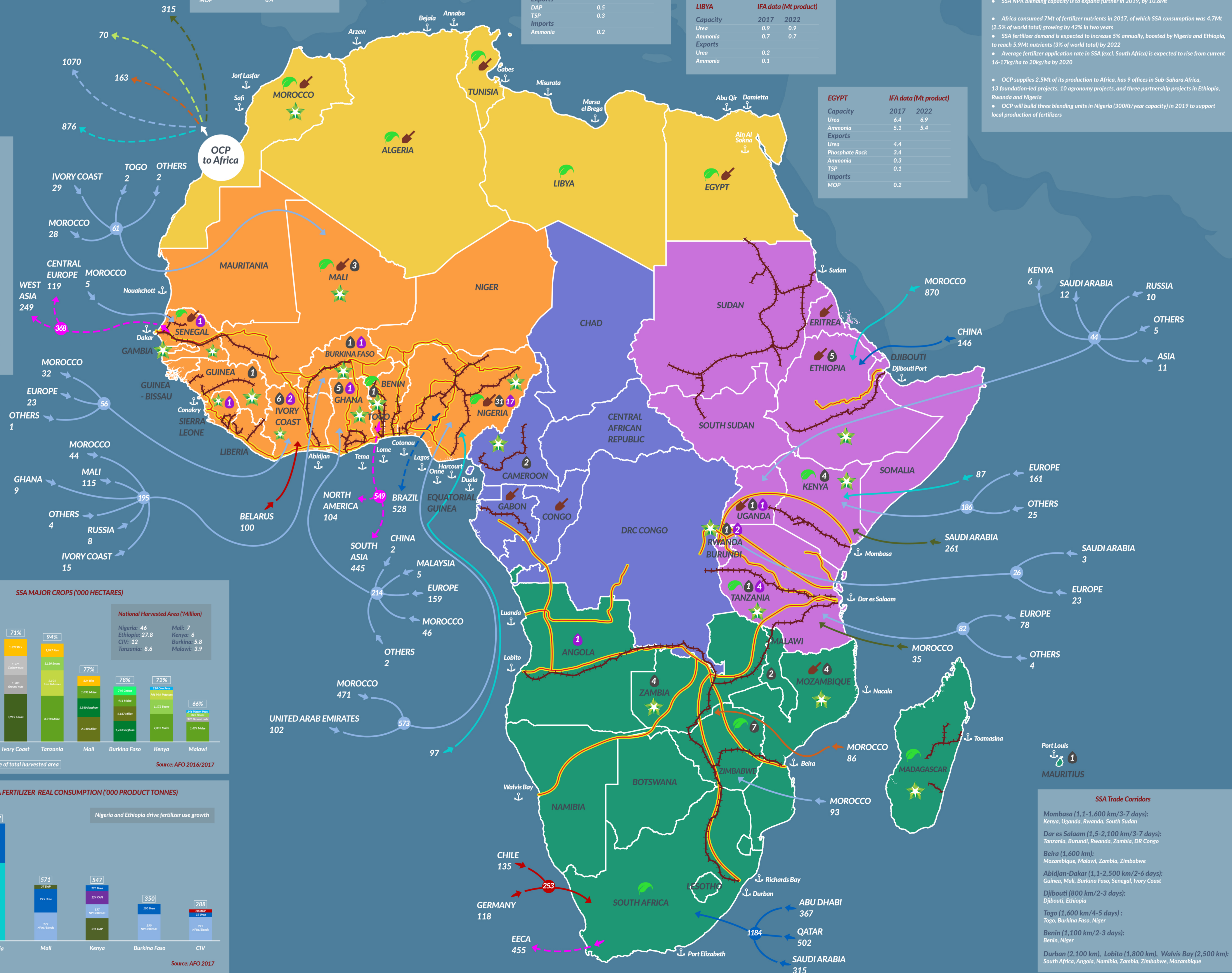
TUNISIA	IFA data (Mt product)	
	2017	2022
Capacity in P205		
Phosphoric Acid	2.0	2.1
DAP/MAP/TSP	0.9	1.0
Exports		
DAP	0.5	
TSP	0.3	
Imports		
Ammonia	0.2	

LIBYA	IFA data (Mt product)	
	2017	2022
Capacity		
Urea	0.9	0.9
Ammonia	0.7	0.7
Exports		
Urea	0.2	
Ammonia	0.1	

EGYPT	IFA data (Mt product)	
	2017	2022
Capacity		
Urea	6.4	6.9
Ammonia	5.1	5.4
Exports		
Urea	4.4	
Phosphate Rock	3.4	
Ammonia	0.3	
TSP	0.1	
Imports		
MOP	0.2	

AFRICA - Key facts

- Africa population: 1.2bn = 16% of global population; likely to rise 20% by 2030
- North Africa has 13% of the world processed phosphate and 5% of nitrogen capacity. This will increase respectively to 18% and 6% in 2022
- With phosphate rock reserves estimated at 50bn in 2018 (USGS), Morocco accounts for over 70% of global reserves
- Nigeria urea capacity will grow from 1.8Mt in 2017 to 5.7Mt in 2022 and ammonia from 1.1 to 3.3Mt, making the country the third largest nitrogen producer in Africa after Egypt and Algeria
- SSA NPK blending capacity is to expand further in 2019, by 10.6Mt
- Africa consumed 7Mt of fertilizer nutrients in 2017, of which SSA consumption was 4.7Mt (2.5% of world total) growing by 42% in two years
- SSA fertilizer demand is expected to increase 5% annually, boosted by Nigeria and Ethiopia, to reach 5.9Mt nutrients (3% of world total) by 2022
- Average fertilizer application rate in SSA (excl. South Africa) is expected to rise from current 16-17kg/ha to 20kg/ha by 2020
- OCP supplies 2.5Mt of its production to Africa, has 9 offices in Sub-Saharan Africa, 13 foundation-led projects, 10 agronomy projects, and three partnership projects in Ethiopia, Rwanda and Nigeria
- OCP will build three blending units in Nigeria (300Kt/year capacity) in 2019 to support local production of fertilizers



SUB-SAHARA AFRICA MANUFACTURING PLANTS (Mt/year)

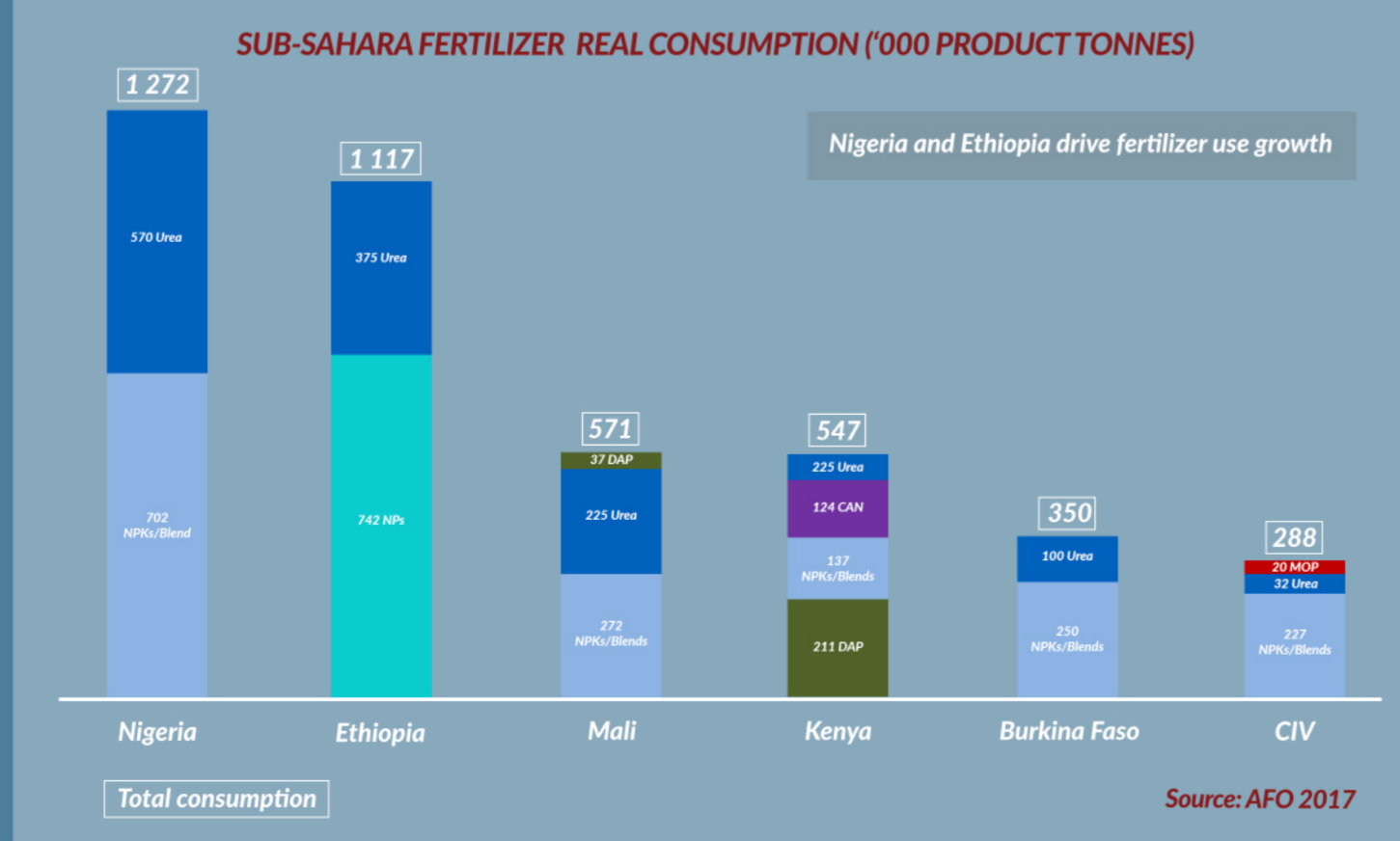
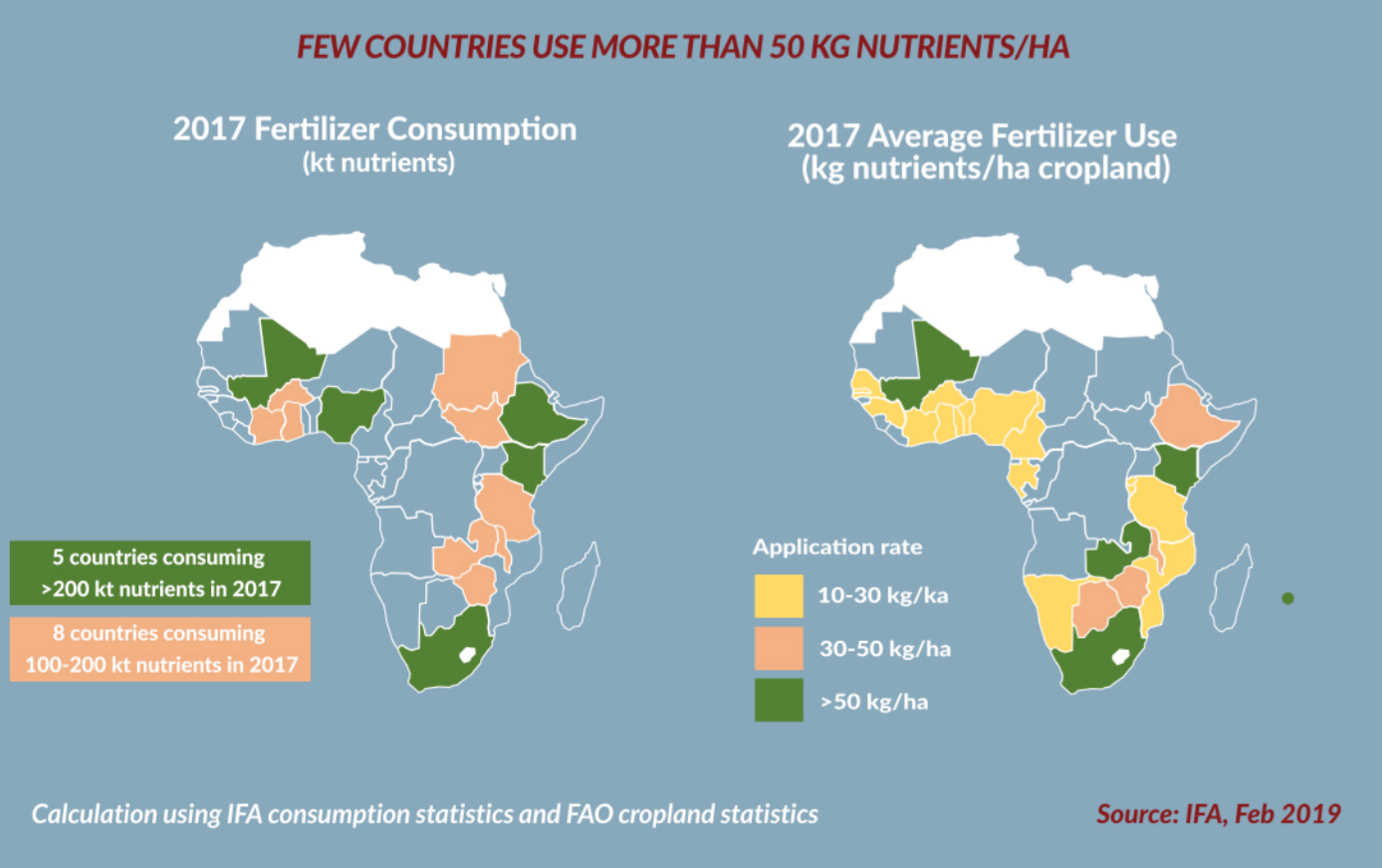
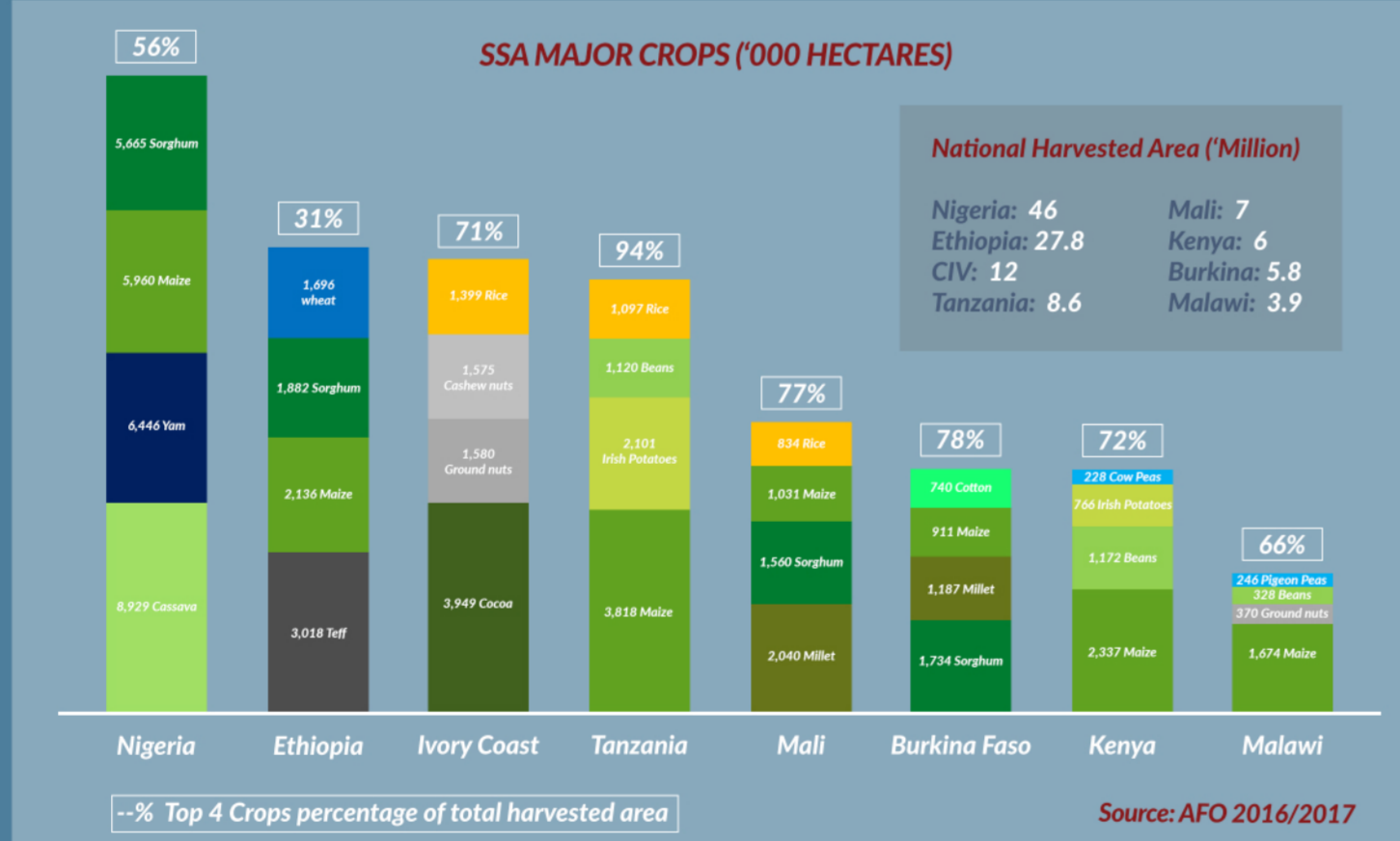
Plants 2018 (14)	Projects 2019 onwards (13)
Congo	Elemental Minerals - 2 potash
Ethiopia	Yara 0.6 SOP
Eritrea	OCP/CIC - 2.3 NPs + 1.5 urea 2022-25
Gabon	Danakil Potash - 0.8 SOP
Kenya	Gabon gov't/Olam - 1.4 urea
Madagascar	Kel Chemicals - 0.2 SSP
Mali	IRM - 0.2 ammonium sulphate
Mozambique	Toguna Agri - 0.3 phosphate rock
Nigeria	Sangoye - 1 phosphate granulator 2019
	Yara - 1.3 urea
	Brass Fertilizer - 1.2 urea Q1 2020
	Dangote Fertilizer - 2.8 urea 2020
	Indorama - 1.5 urea
	Indorama - 1.3 urea 2021
	Indorama - 0.8 and 1.5 phosphates
	SERPM - 0.25 phosphate rock
	Amalrique - 3 phosphate granulator 2019
	Omnio - 0.6 CAN/NPKs
	Faskor - 0.4 MAP/0.6 PA/2.2 SA
	Sasol - 0.4 ammonia/0.3 AN/0.1 AS
	Minjingu Mine - 0.1 phosrock/0.1 NPKs
	SNPT - 4.8 phosphate rock
	Sukulu Mines - 0.3 SSP/TSP
	Zimphos/Chemplex - 0.2 phosrock/0.2 SSP
	Sable Chemical - 0.2 AN

Source: AFO Register 2019

SUB-SAHARA AFRICA NPK BLENDING - Strong growth

- 75 blenders and 5 steam granulators on stream in 2018 in 18 countries, up from 59 units in 2017 and 47 in 2016
- About 16Mt/year of blending and 716Kt/year of granulation capacity:
 - 12Mt in West Africa, 54% Nigeria
 - 4.6Mt in East/Southern Africa, 34.5% Zimbabwe
- 31 projects in 2019 in 11 countries, 23 in West Africa (17 Nigeria) and 8 in East/Southern Africa (4 Tanzania)

Source: AFO Register 2019



SSA Trade Corridors

- Mombasa (1,1-1,600 km/3-7 days): Kenya, Uganda, Rwanda, South Sudan
- Dar es Salaam (1.5-2,100 km/3-7 days): Tanzania, Burundi, Rwanda, Zambia, DR Congo
- Beira (1,600 km): Mozambique, Malawi, Zambia, Zimbabwe
- Abidjan-Dakar (1,1-2,500 km/2-6 days): Guinea, Mali, Burkina Faso, Senegal, Ivory Coast
- Djibouti (800 km/2-3 days): Djibouti, Ethiopia
- Togo (1,600 km/4-5 days): Togo, Burkina Faso, Niger
- Benin (1,100 km/2-3 days): Benin, Niger
- Durban (2,100 km), Lobito (1,800 km), Walvis Bay (2,500 km): South Africa, Angola, Namibia, Zambia, Zimbabwe, Mozambique