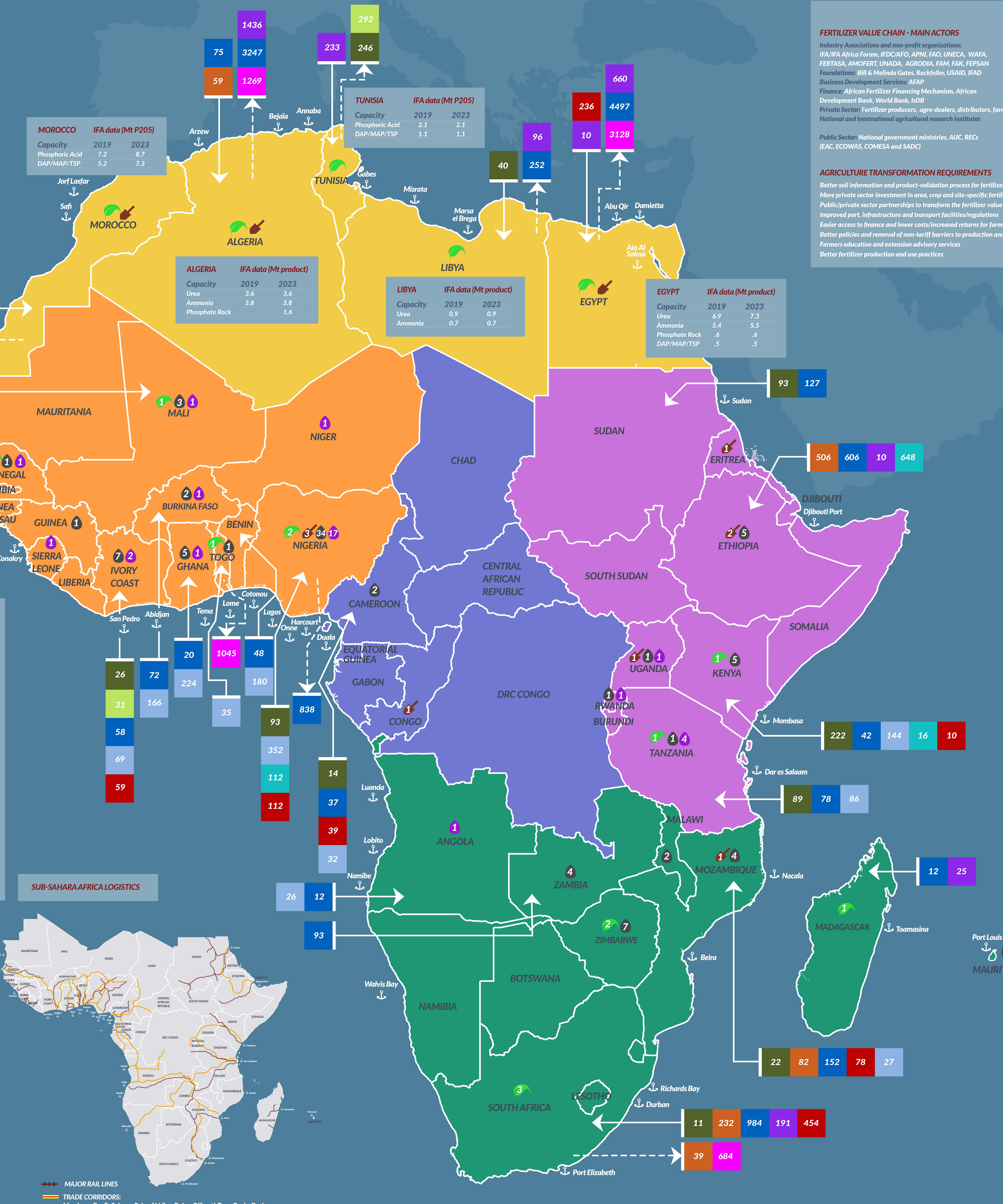
AFRICA FERTILIZER MAP 2020

MAP KEY

DAP	NORTHERN AFRICA	IMPORT PORTS
MAP	WESTERN AFRICA	MANUFACTURING PLANTS
TSP	CENTRAL AFRICA	MANUFACTURING PROJECTS
PHOSPHATE ROCK	EASTERN AFRICA	BLENDING UNITS
UREA	SOUTHERN AFRICA	BLENDING PROJECTS
AMMONIA		IMPORTS
NPK		EXPORTS
NPS		
MOP		

Product trade flows in '000 metric tonnes, MAP figures include NPs, cut off tonnage 10,000 tonnes. Source: IFASTAT 2018
Sub-Sahara NPKs/NPs imports, cut off tonnage 10,000 tonnes. Source: AFO 2018 data Sub-Sahara plants and projects. Source: AFO/IFA 2019 data



MOROCCO	IFA data (Mt P205)	
Capacity	2019	2023
Phosphoric Acid	7.2	8.7
DAP/MAP/TSP	5.2	7.3

TUNISIA	IFA data (Mt P205)	
Capacity	2019	2023
Phosphoric Acid	2.1	2.1
DAP/MAP/TSP	1.1	1.1

ALGERIA	IFA data (Mt product)	
Capacity	2019	2023
Urea	3.6	3.6
Ammonia	3.8	3.8
Phosphate Rock		1.6

LIBYA	IFA data (Mt product)	
Capacity	2019	2023
Urea	0.9	0.9
Ammonia	0.7	0.7

EGYPT	IFA data (Mt product)	
Capacity	2019	2023
Urea	6.9	7.3
Ammonia	5.4	5.5
Phosphate Rock	.6	.6
DAP/MAP/TSP	.5	.5

FERTILIZER VALUE CHAIN - MAIN ACTORS

Industry Associations and non-profit organizations:
IFA/IFA Africa Forum, IFDC/AFO, APNI, FAO, UNECA, WAFA, FERTASA, AMOFERT, UNADA, AGRODIA, FAM, FAK, FEPSAN
Foundations: Bill & Melinda Gates, Rockfeller, USAID, IFAD
Business Development Services: AFAP
Finance: African Fertilizer Financing Mechanism, African Development Bank, World Bank, IsDB
Private Sector: Fertilizer producers, agro-dealers, distributors, farmers
National and International agricultural research institutes

Public Sector: National government ministries, AUC, RECs (EAC, ECOWAS, COMESA and SADC)

AGRICULTURE TRANSFORMATION REQUIREMENTS

Better soil information and product-validation process for fertilizer blending
More private sector investment in area, crop and site-specific fertilizers
Public/private sector partnerships to transform the fertilizer value chain
Improved port, infrastructure and transport facilities/regulations
Easier access to finance and lower costs/increased returns for farmers
Better policies and removal of non-tariff barriers to production and trade
Farmers education and extension advisory services
Better fertilizer production and use practices

AFRICA DEVELOPMENT INITIATIVES

AGRA's Soil Health and Fertilizer Supply Program
Nigeria - Fertilizer Presidential Initiative
Ethiopia - Second Growth and Transformation Plan 2015–20
Kenya - Third Mid Term Investment Plan - 2018–22
Tanzania Agricultural Sector Development Strategy phase two

Africa Plant Nutrition Institute - Projects
Africa Continental Free Trade Area
ADB/AFAP agreement to develop Nigeria and Tanzania
Africa Women development
Africa public sector investments

OCP School Lab and Agribooster programs
Yara Generation Africa
Maa'den acquisition of Meridien distributor in Mauritius
K&S acquisition of distributor in Uganda
Growing blending capacity in Sub-Sahara Africa:
87 units in 2019 and 32 new projects
Sub-Sahara manufacturing capacity:
14 plants in 2019 and 9 projects

Source: Agra 2019
Feeding Africa Soils: Fertilizers to support Africa's agricultural transformation

AFRICA CHALLENGES

- Soil fertility depletion, low productivity of smallholder farms and often-insecure land holdings
- Undeveloped market infrastructure and insufficient number of agro-dealers
- Ineffective fertilizer investment policies and inadequate subsidies
- Lack of youth and women involvement in blending, selling, marketing and promotion of fertilizers
- Poor access to finance and perceived risks by financial institutions
- Slow adoption of new technologies, innovative business models, agricultural research and extensive services

Agriculture Transformation is a key strategic pillar of the Africa Union's Agenda 2063:
The private sector plays an increasing role in Sub-Sahara Africa
The average fertilizer application rate has doubled in the past 10 years

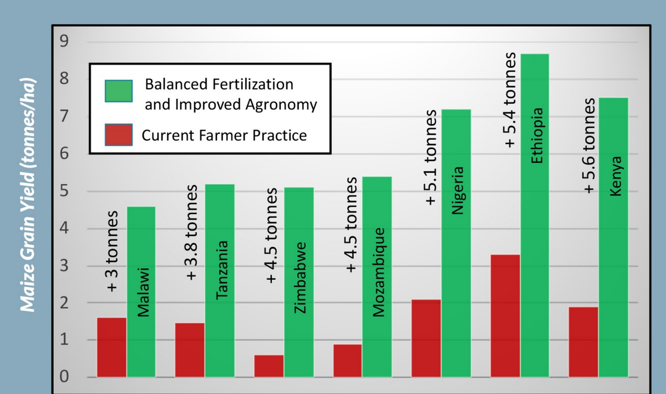
TOWARDS ABUJA II – 2020-21

TARGETS FOR AFRICA

- Sustainable food and nutrition security by 2025
- Higher fertilizer focus towards Sustainable Soil Management
- Greater role and responsibilities of private sector (Fertilizer, Agrofood, Financial Industry), together with public sector (AU, RECs, Governments)
- Further implementation of Abuja I 2006
- Strategies for post-summit action plan and road map
- AUC task Force: IFA, AFAP, IFDC, AFFM, AGRA, IITA, BMGF, FAO, OCP, Nigerian Government

AFRICAN PLANT NUTRITION INSTITUTE

APNI field research consistently shows that large improvements in crop yields are possible with balanced nutrition and good agronomic practices



APNI MISSION:
Innovative plant nutrition for a resilient and food-secure Africa

KEY APNI RESEARCH AREAS:
- Precision Nutrient Management
- Climate-Smart Plant Nutrition
- Plant Nutrition for "One Health"

[soil → plant → animal → human health]

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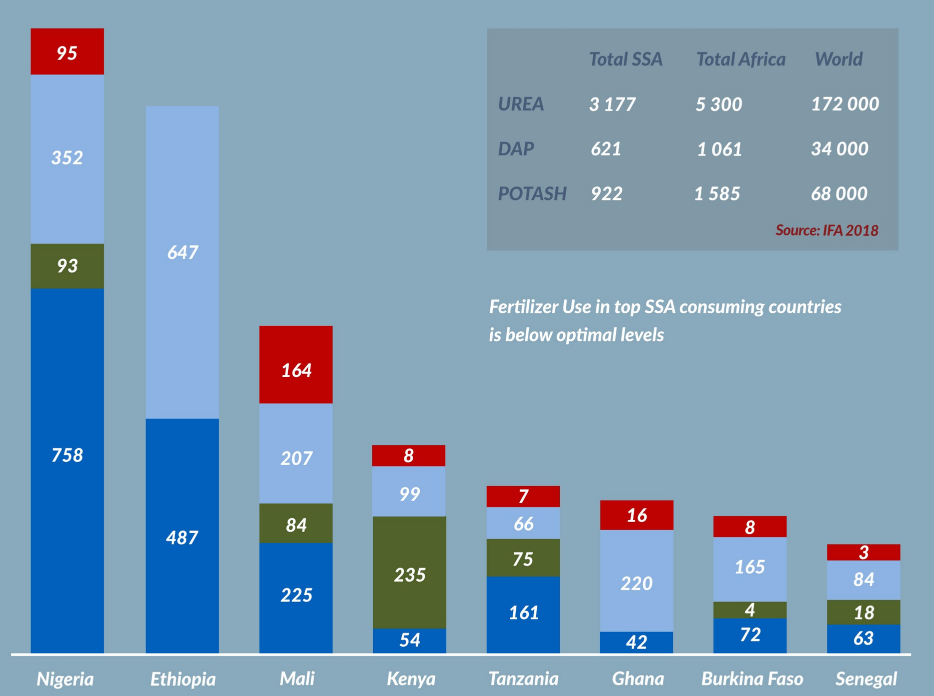
SUB-SAHARA AFRICA FERTILIZER CONSUMPTION



	Total SSA	Total Africa	World
UREA	3 177	5 300	172 000
DAP	621	1 061	34 000
POTASH	922	1 585	68 000

Source: IFA 2018

Fertilizer Use in top SSA consuming countries is below optimal levels

Apparent consumption in '000 product tonnes

Source: AFO 2018

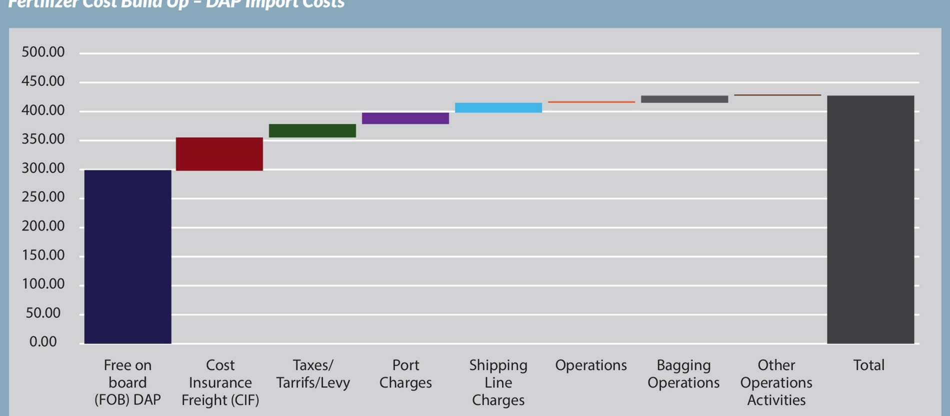
SUB-SAHARA AFRICA LOGISTICS

MAJOR RAIL LINES
TRADE CORRIDORS:
Mombasa, Dar Es Salaam, Beira, Abidjan-Dakar, Djibouti, Togo, Benin, Durban

FERTILIZER COSTS ALONG THE SUPPLY CHAIN

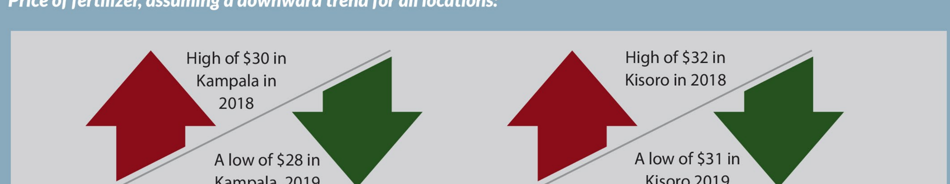
2019 Nigeria

Fertilizer Cost Build Up – DAP Import Costs



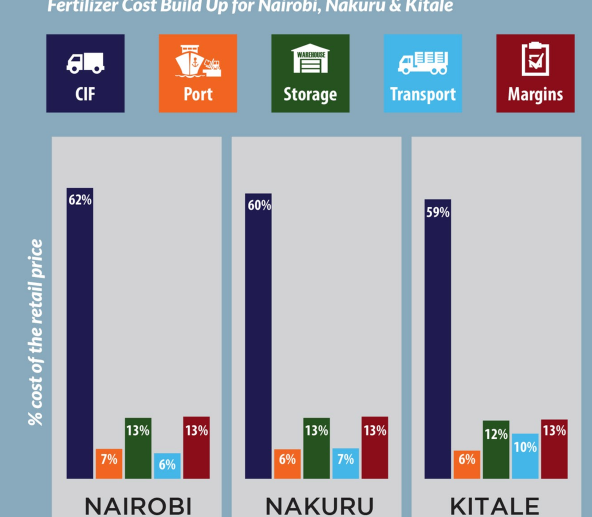
2018/2019 Uganda

Price of fertilizer, assuming a downward trend for all locations:



2018 Kenya

Fertilizer Cost Build Up for Nairobi, Nakuru & Kitale



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