AFRICA FERTILIZER MAP 2018

SPONSORED BY: OCP AFRICA

PLANTS/CAPACITY, PROJECTS (million tonnes/year) AND BLENDING UNITS (tonnes/hour)

NORTH AFRICA	Capacity 2016	Projected Capacity 2021
Morocco	5.8 phosphoric acid 4.2 DAP/MAP/TSP	8.4 phosphoric acid 7.4 DAP/MAP/TSP
Egypt	2.9 urea 4.2 ammonia 0.2 phosphoric acid 0.2 DAP/MAP/TSP	3.1 urea 4.5 ammonia 0.6 phosphoric acid 0.5 /MAP/TSP
Algeria	1.6 urea 3.2 ammonia	1.6 urea 3.4 ammonia
Tunisia	2.2 phosphoric acid 0.9 DAP/MAP/TSP	2.1 phosphoric acid 1.0 DAP/MAP/TSP
Libya	0.4 urea 0.6 ammonia	0.4 urea 0.6 ammonia
SUB-SAHARA AFRICA	**Plants 2016**	**Projects 2017-2021**
Burkina Faso	1 blending unit - 60	1 blending unit 2018
Cameroon	2 blending units	
Congo		Elemental Minerals – 2 potash
Cote d'Ivoire	6 blending units - 300	2 blending units – 220 2018-19
Eritrea		Danakil Potash – 0 .8 SOP
Ethiopia	5 blending units - 250	Yara 0.6 SOP OCP/CIC – 2.3 NPs + 1.5 urea 2022-25
Gabon		Gabon govt/Olam - 1.4 urea
Ghana	3 blending units – 95	2 blending unit – 80 2017-18
Guinea	1 blending unit - 90	
Kenya	Kal Chemicals - 0.2 SSP 3 blending units - 110	1 blending unit – 50 2017
Madagascar	IRM - 0.2 ammonium sulphate	
Malawi	2 blending units -110	1 blending unit 2018
Mali	Toguna Agri - 0.3 phosphate rock 4 blending units - 191	
Mauritius	1 blending unit – 8	
Mozambique	4 blending units – 93	Yara – 1.3 urea 2023-24
Nigeria	Notore - 0.5 urea Indorama - 1.4 urea 14 blending units – 1,100	Dangote Fertilizer - 2.8 urea 2017 Indorama – 1.3 urea 2020 5 blending units 2018-19
Rwanda		1 blending unit – 100 2017-19
Senegal	ICS - 0.2 phosphate rock/PA/DAP/SSP/TSP SERPM - .025 phosphate rock	Indorama 0.8 and 1.5 phosphates 1 blending unit
South Africa	Omnia - 0.6 CAN/NPKs Foskor - 0.4 MAP/0.6 PA/2.2 SA Sasol - 0.6 ammonia/0.3 AN/0.1 AS	
Tanzania	Minjingu Mine - 0.1 phosrock/.030 NPKs	TPDC – 2.2 ammonia/3.9 urea 2020 3 blending units – 200 2018-20
Togo	SNPT - 0.3 phosphate rock 1 blending unit – 120	
Uganda		Sukulu Mines - 0.3 SSP/TSP 1 blending unit – 50 2018
Zambia	Nitrogen Chemicals - 0.3 NPKS/.07AN 4 blending units -30	
Zimbabwe	Zimphos - 0.2 Phosrock/0.05 TSP/0.2 SSP Sable Chemical - 0.2 AN 4 blending units -530	4 blending unit – 240 2017-18

Source: IFA / AFO / AFAP

KEY - HOW TO READ THE MAP

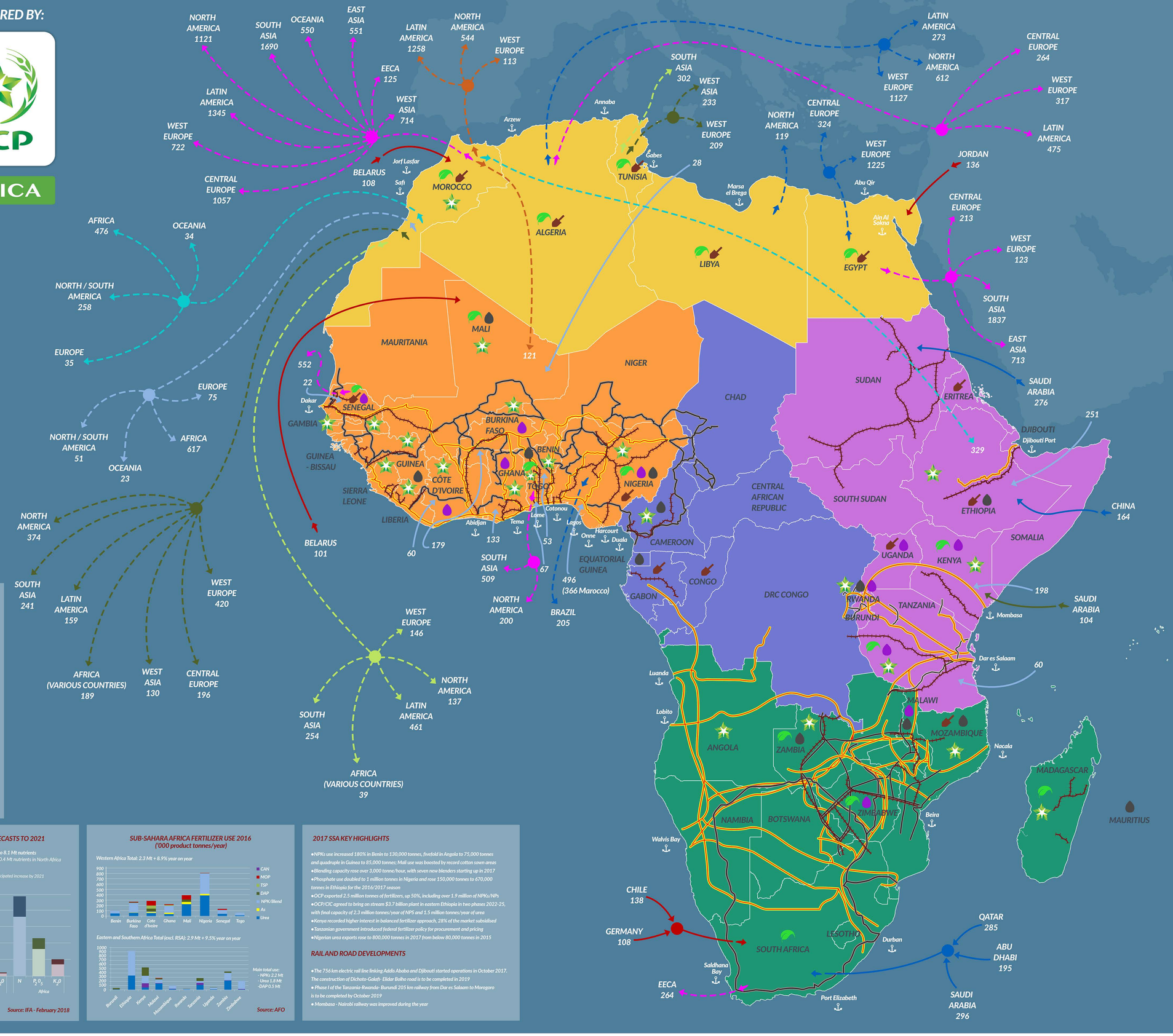
DAP, MAP, TSP, MOP, PHOSPHATE ROCK, UREA, NPK, NPS

NORTHERN AFRICA, WESTERN AFRICA, CENTRAL AFRICA, EASTERN AFRICA, SOUTHERN AFRICA

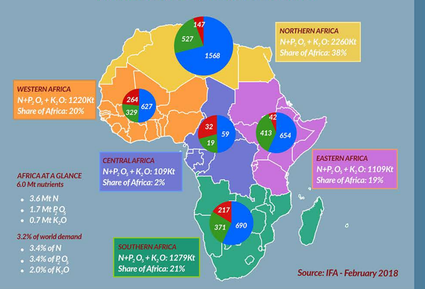
OCP AFRICA OFFICES, AGRONOMY AND LED PROJECTS, IMPORT PORTS, BLENDING UNITS, BLENDING PROJECTS, PLANTS/CAPACITY, PROJECTS/PROJECTED CAPACITY

EXPORTS, IMPORTS, MAJOR RAIL LINES*, TRADE CORRIDORS*, MAJOR ROADS*

Urea, MOP, MAP, DAP, TSP, MOP, Phosphate Rock , NPK and NPS are in '000 metric tonnes. Source: IFA 2016 data Cutoff tonnage is 100,000 tonnes. MAP figures include NPs
*Only major trade corridors, rail and lines in Sub-Sahara Africa have been represented: Mombasa; Dar es Salaam, Beira, Abidjan/Dakar, Djibouti, Lome, Cotonou, Durban.
Sub-Sahara NPKs imports include NPK, NP, NK and P compounds. Origins are not shown and include: Morocco and other African countries, Europe, China, South Arabia and Vietnam.
Source: IFDC/AFAP 2016 data
NPK exports from Morocco include NPK, NPKS, NPKSB,NPKSBZn NPS exports from Morocco include NPS/NPSB/NPSBZn. Source: OCP Africa 2016 data
North Africa capacity and projected capacity are in nutrient tonnes by country Source: IFA 2016-2021 data (unless otherwise specified)
Sub-Sahara Africa plants and projects are in million product tonnes/year, rounded to the closest million. Blending Units are in product tonne/hour. Source: AFO/AFAP 2016-2021 data



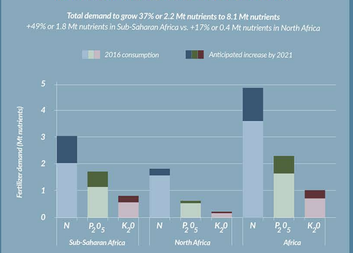
AFRICA CONSUMED 6.0 MT NUTRIENTS IN 2016



Source: IFA - February 2018

AFRICA FERTILIZER DEMAND - FORECASTS TO 2021

Total demand to grow 37% or 2.2 Mt nutrients to 8.1 Mt nutrients
+49% or 1.8 Mt nutrients in Sub-Saharan Africa vs. +17% or 0.4 Mt nutrients in North Africa



Source: IFA - February 2018

SUB-SAHARA AFRICA FERTILIZER USE 2016 ('000 product tonnes/year)

Western Africa Total: 2.3 Mt + 8.9% year on year

Eastern and Southern Africa Total (excl. RSA): 2.9 Mt + 9.5% year on year

Main total use:
- NPKs: 2.2 Mt
- Urea 1.8 Mt
-DAP 0.5 Mt

Source: AFO

2017 SSA KEY HIGHLIGHTS

- NPKs use increased 180% in Benin to 130,000 tonnes, fivefold in Angola to 75,000 tonnes and quadruple in Guinea to 85,000 tonnes; Mali use was boosted by record cotton sown areas
- Blending capacity rose over 3,000 tonne/hour, with seven new blenders starting up in 2017
- Phosphate use doubled to 1 million tonnes in Nigeria and rose 150,000 tonnes to 670,000 tonnes in Ethiopia for the 2016/2017 season
- OCP exported 2.5 million tonnes of fertilizers, up 50%, including over 1.9 million of NPKs/NPs
- OCP/CIC agreed to bring on stream $3.7 billion plant in eastern Ethiopia in two phases 2022-25, with final capacity of 2.3 million tonnes/year of NPS and 1.5 million tonnes/year of urea
- Kenya recorded higher interest in balanced fertilizer approach, 28% of the market subsidised
- Tanzanian government introduced federal fertilizer policy for procurement and pricing
- Nigerian urea exports rose to 800,000 tonnes in 2017 from below 80,000 tonnes in 2015

RAIL AND ROAD DEVELOPMENTS

- The 756 km electric rail line linking Addis Ababa and Djibouti started operations in October 2017. The construction of Dichoto-Galafi- Elidar Bolho road is to be completed in 2019
- Phase I of the Tanzania-Rwanda- Burundi 205 km railway from Dar es Salaam to Moragoro is to be completed by October 2019
- Mombasa - Nairobi railway was improved during the year

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PROJECT MANAGER: Antonella Harrison