



CAN AFRICAN FOOD SYSTEMS THRIVE WITHOUT CHEMICAL FERTILISERS?

The rise in fertiliser prices caused by the US-Israeli war on Iran has been a stark reminder of how dependent the global food system is on this chemical input. With the Strait of Hormuz effectively blocked, the world suddenly lost one of its most critical sources of fertiliser exports, as well as the sulphur and natural gas needed to produce fertilisers elsewhere. Fertiliser prices increased sharply as a result, raising fears of a food price crisis, which could affect millions of people who are already food insecure (see *Graphic 1*).¹

When international fertiliser prices spike, they tend to reach their most extreme levels in Africa.² During the last surge in 2021, fertiliser companies increased their prices in Africa to levels above those on international markets, and then kept them there until 2023 when prices dropped elsewhere.³ Things could be worse this time around, given the dependence of African countries on fertilisers from the Persian Gulf (see *Box*).

Yet food systems in much of Africa have been shielded from the impacts of these price swings and shortages. That is because fertiliser use is much lower here than in other parts of the world. Chemical fertilisers are rarely used on traditional food crops like cassava in West Africa, sorghum in the Sahel, or banana around the Great Lakes. Nor are indigenous chicken and cattle breeds fed on diets of fertiliser-intensive commercial feeds. Fertiliser tends to be used most heavily on cash crops, like cotton or sugar cane. So, rising global fertiliser prices do not necessarily translate into higher food prices in Africa, at least for locally produced foods.

Yet this situation is changing. Over the past two decades, African governments and donors have ploughed billions of dollars into subsidy schemes and development programmes to increase fertiliser use by small farmers. Use has gone up, almost double what it was twenty years ago (see *Graphic 2*).⁴ But only 15 countries account for nearly 90% of Africa's fertiliser consumption. Just four – Egypt,

South Africa, Ethiopia and Nigeria – account for two-thirds (see *Map 1*).⁵

A steep price

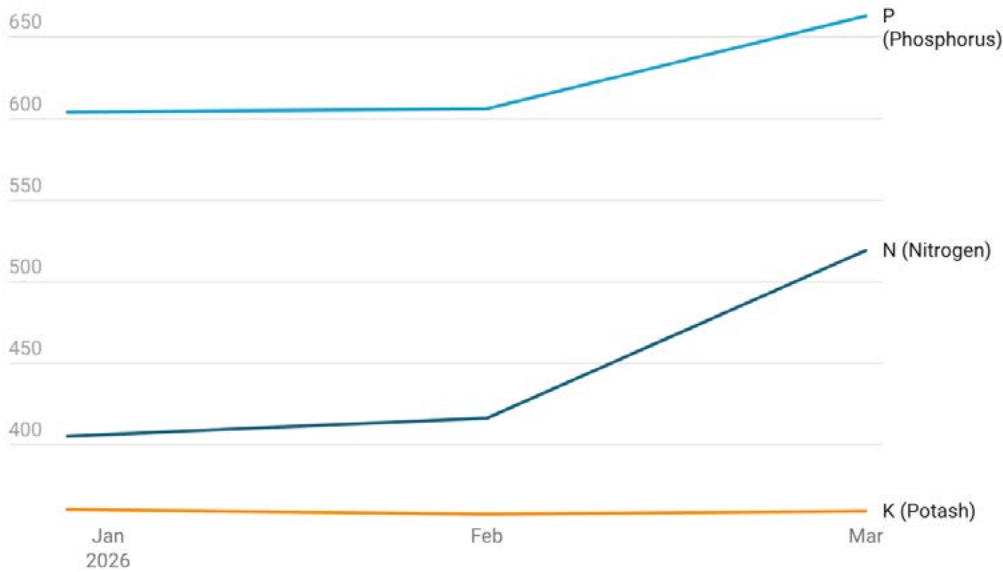
Since 2006, African governments have devoted on average 30% of their national agriculture budgets to the fertiliser subsidies. In Ethiopia, Malawi and Zambia, the figure is closer to 50%. At one point, Malawi's payouts ate up 8% of the entire government budget, forcing cuts to public education and infrastructure.⁶ Yet these massive expenditures have not worked. Average fertiliser use among small farmers has plateaued at around 20 kg per hectare, far from the 50 kg per hectare that African governments committed to achieving under the Abuja Declaration in 2006.⁷ Why? Prices.

"Some fertilisers are subsidised by the government at relatively fair prices, but these are provided to farmers in very small quantities, insufficient to meet their needs," says Ahmed Elmaghrabi, a leader with the newly formed Federation of Trade Union Solidarity in Egypt. "So, farmers purchase fertilisers from the market to supplement their needs. The price difference is significant, reaching up to five times the price of subsidised fertiliser. It's a big burden for small farmers."⁸

Leocardia Shayamunda of the Catholic Commission for Justice and Peace says the situation is similar in Zimbabwe. "Many poor farmers who manage to buy fertilisers do not use the prescribed amount but less, and the result is that they still get poor yields, just

Graphic 1. Fertiliser prices evolution

January - March 2026 (Euro/tonne)



Price evolution for the European Union

Chart: GRAIN • Source: European Commission • Created with Datawrapper

enough for household consumption with little or nothing extra to earn some income."⁹

The German NGO INKOTA looked into the experience of farmers in Tanzania's Ilhemi Cluster, where the government partnered with fertiliser corporations and donors to heavily encourage farmers to use high levels of subsidised fertilisers on maize. In this case, the number of farmers using fertiliser more than doubled. But input costs for farmers quintupled, from an average of US\$30 to US\$160 per season. As a result, INKOTA found farmers did not benefit from the higher yields and are now vulnerable to any increase in the price of fertiliser and other inputs.¹⁰

The scenario is the same for farmers in other parts of Africa where high levels of chemical fertilisers are used on cash crops. In Burkina Faso and Egypt, for example, cotton farmers use a lot of fertilisers. But their production costs can exceed the price they get for the crop, forcing them to produce less.¹¹ In Kenya, where tea is the most important farm export and receives more fertiliser per hectare than any other crop, small growers are abandoning production because of high fertiliser costs, together with low tea prices.¹² The same goes with small-scale farmers growing tobacco under contract in Malawi.

Fertilisers are their biggest expense, and most of them suffer from chronic debt, with their costs of production always higher than what they receive for their tobacco.¹³

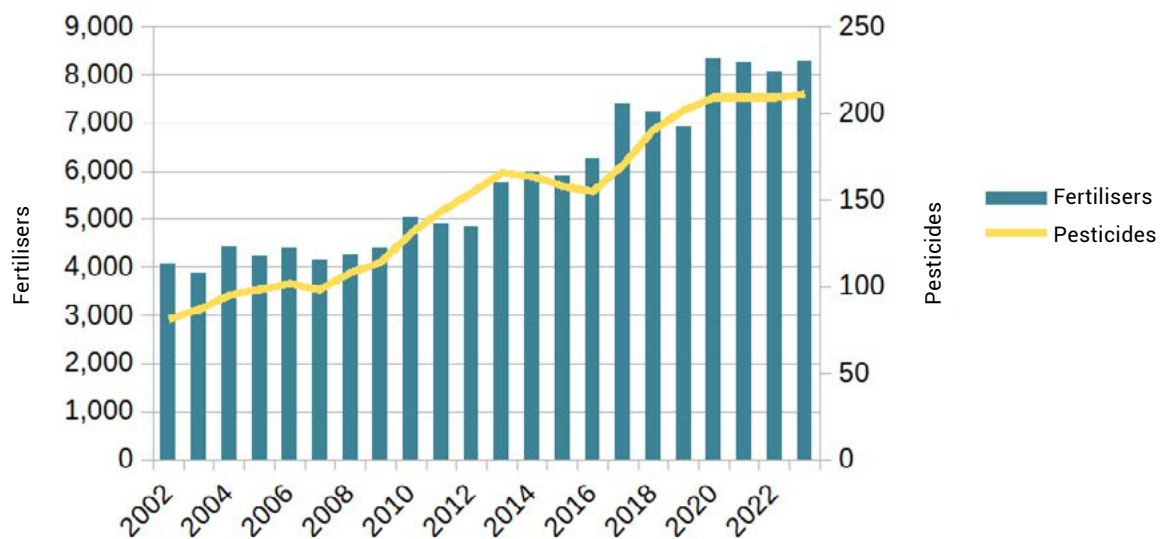
Fertile ground for fertiliser corporations

Fertilisers are not just expensive in Africa, they are *more expensive* here. African farmers are generally charged more for the same fertilisers sold to farmers in other parts of the world, including the US and Europe.¹⁴ Some of this is due to infrastructure challenges and logistics. Corruption is also a contributing factor.¹⁵ But these prices are also a reflection of the market power of fertiliser companies who control imports and distribution.¹⁶

Many of Africa's national fertiliser markets are in the hands of a small number of companies and traders with monopoly or near-monopoly positions.¹⁷ In Malawi and Tanzania, for instance, a few large foreign companies control around 90% of fertiliser retail sales and imports.¹⁸ This gives these companies power to set prices and extract profits. For fertiliser traders in East and Southern Africa, profit margins are around 40%. In other parts of the continent, they vary from 30% to a whopping 80%!¹⁹

Graphic 2. Fertilisers and pesticides consumption in Africa

Thousand tonnes (2002-2023)



The African fertiliser market is currently worth around US\$10–\$15 billion and is projected to grow to US\$20 billion over the next four years.²⁰ The largest fertiliser manufacturers – like Yara of Norway, OCP of Morocco, PhosAgro of Russia, Nutrien of Canada and Mosaic of the US – are all trying to expand their presence in this growing and profitable market.²¹ So, too, are investors from the Gulf and local billionaires like Aliko Dangote (see Table).

Yara's big move to break into Africa was through the Southern Agricultural Growth Corridor of Tanzania (SAGCOT), which it helped plan and initiate in 2011 with the support of Norway, the US and the Gates Foundation. Although SAGCOT failed in its ambition to convert the area into large-scale industrial farms and contract growing operations, it did enable Yara to develop a vertically-integrated network extending deep into the Tanzanian countryside.²² Yara is now focusing on Tanzania for the roll-out of its AfricaConnect digital platform, which it claims has 130,000 farmer subscribers, many of them actively using the app to get loans to buy fertilisers.²³

OCP is also using digital tools to expand fertiliser sales in Africa. Its Udongo app has registered 215,000 farmers in seven countries.²⁴ And it has teamed up with the World Bank to do digital soil mapping for customised fertilisation approaches in West Africa.²⁵

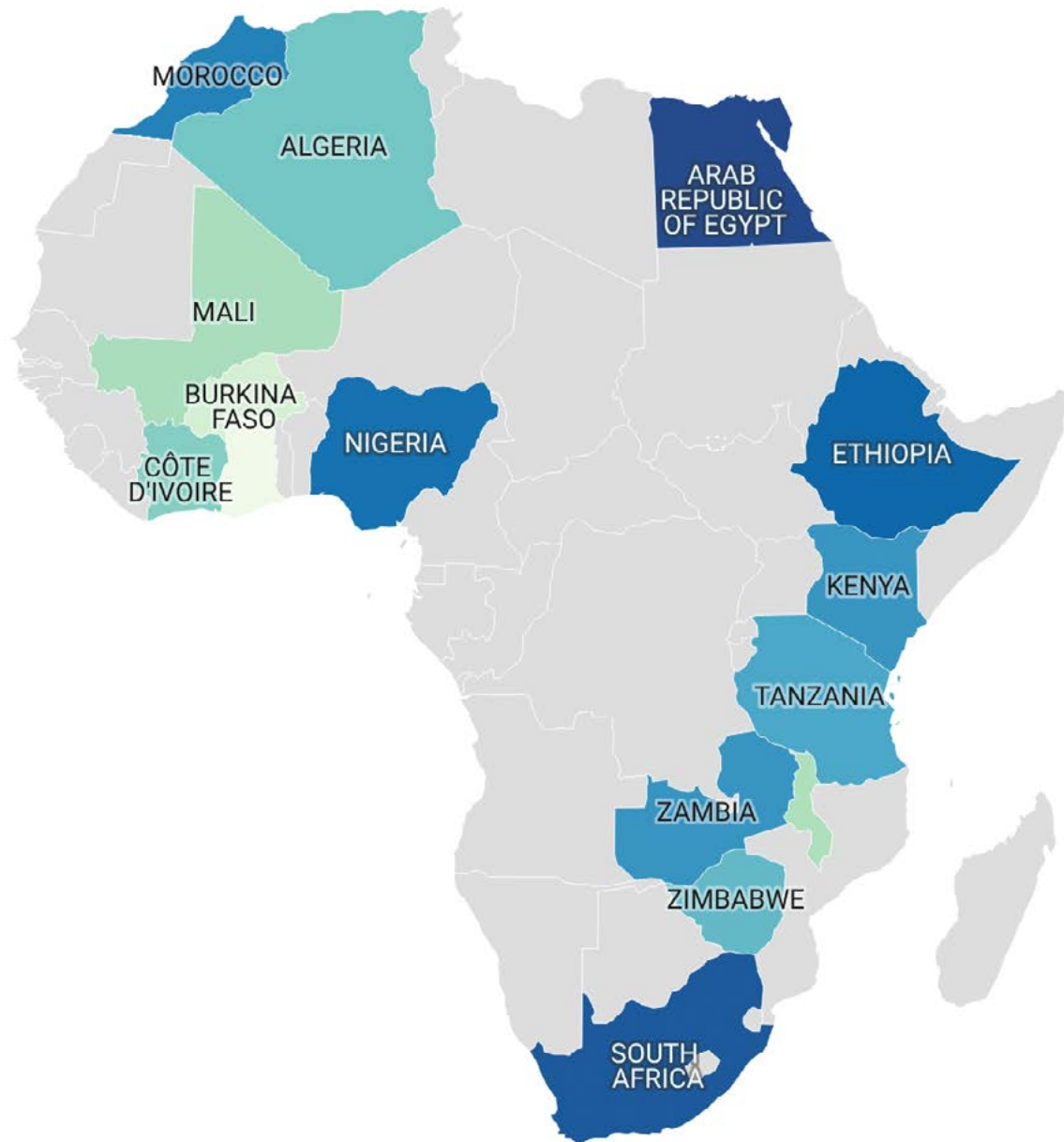
Another way that Yara and OCP are expanding their market in Africa is through a fertiliser financing mechanism launched by the African Development Bank (AfDB) in 2018. The mechanism provides large corporations, like Yara and OCP, with credit guarantees to boost fertiliser imports and distribution.²⁶ It is also funding training programmes and facilitating imports through an industry lobby group called the African Fertilizer and Agribusiness Partnership.²⁷

But these mechanisms are not really working. The AfDB's programme in Côte d'Ivoire and Ghana, in partnership with OCP, was supposed to generate US\$100 million in sales and reach 250,000 farmers. But it has only generated US\$4 million in sales for OCP and reached 25,000 farmers. The AfDB said high prices were partly to blame for the failure.²⁸

We see similar problems in Zimbabwe, where AfDB recently provided a US\$4.3 million credit guarantee to a subsidiary of the Saudi fertiliser giant Ma'aden.²⁹ The bank vowed that the financing would increase production of maize, wheat and oil seeds by enabling Ma'aden to sell 60,000 tonnes of fertiliser to 180,000 farmers. Yet, by the end of 2024, the company had only sold 11,000 tonnes to 88 farmers. While AfDB said that these farmers increased production as a result, it acknowledged that none of them were small-scale farmers!³⁰

Top 15 African countries by total chemical fertiliser consumption in 2023

Thousand tonnes (all nutrients)



Map: GRAIN • Source: International Fertilizer Association – IFA Database • Created with Datawrapper

Fertiliser sovereignty?

When African governments and farmers buy fertiliser, most of the money leaves their borders. Only Nigeria and the countries of North Africa are significant producers of chemical fertilisers. The rest have to import about 80% of what they use. In the case of Cameroon, Côte d'Ivoire, Mali and Rwanda, the dependency is complete.³¹ This is clearly a problem. It leaves countries vulnerable to global market dynamics and drains national income and foreign currency reserves.

Some African states are trying to develop local fertiliser production as a way to drive down prices and overcome this dependence.³² But this strategy can breed other problems.

In 2019, the government of Burundi enacted a ban on fertiliser imports in order to give the country's sole fertiliser producer a monopoly on sales. This company, owned by the politically connected businessman Adrien Ntigacika, was then accused of billing the government for tens of millions of US dollars for fertilisers that it did not deliver and causing a nationwide fertiliser shortage.³³ Burundi spends a staggering 60% to 70% of its agriculture budget on fertiliser subsidies that go directly to Ntigacika's company. "We see billions going into this sector every year, but fertilisers never reach the people as they should," says Faustin Ndikumana, of the NGO PARCEM Burundi.³⁴ Ntigacika is now developing fertiliser factories through public-private partnerships with governments in Angola, Ghana, Kenya, Nigeria, Uganda, Zambia and Tanzania.³⁵

Another African billionaire investing heavily in fertiliser production is the Nigerian cement baron Aliko Dangote. He is currently expanding his natural gas-based urea plant in Nigeria, which is already Africa's largest. In August 2025, he also signed a deal with the Ethiopian government to build a similar urea plant there for US\$2.5 billion.³⁶ Singapore's Indorama Group is also expanding its nitrogen fertiliser production and export facilities in Nigeria, with billions of dollars in financing from development banks.³⁷

Other countries, like Tanzania, are also planning to use part of their natural gas reserves to produce nitrogen fertilisers. In

2024, Tanzania signed an agreement with Indonesia's ESSA Group for the construction of a US\$1.4 billion urea factory. In March 2026, it began talks with Japan's Toyo Engineering Corporation for the construction of another site. At the same time, Tanzania is pursuing plans to build a coal-fired urea factory on 2,700 hectares in Tabora Municipality that villagers say will displace them from lands they use to grow food.³⁸ The Zambian government, for its part, has commissioned a Chinese company to build and operate a 300,000 tonne urea factory that will be supplied with coal and phosphates from mining operations in the south of the country.³⁹

Dangote says he can single-handedly end Africa's fertiliser imports with his current projects. "We have a very aggressive trajectory right now. We want to put Dangote to be the highest producer of urea, bigger and higher than Qatar - give me 40 months," he told attendees at the 2024 annual Afreximbank meeting.⁴⁰

But will Dangote's factories or others in Africa make fertilisers more affordable for African farmers? Dangote's Nigerian factory ships most of its urea to the US and Brazil. And what it sells on the domestic market, or in other African countries, reflects the prices it can get on international markets. It also tends to gravitate toward supplying larger markets outside of Africa when there are supply shocks and price spikes, as it did in 2021.⁴¹ In early March 2026, just one week after the US and Israel began their assault on Iran, Dangote hiked its urea prices by 40%.⁴²

There are also heavy environmental and social costs from fertiliser mining and production that need to be considered. Morocco's OCP is investing billions of dollars to expand its phosphate mines and factories. Yet communities living near the company's operations in Morocco say the pollution and toxic waste is degrading their lands, destroying the surrounding ecosystem and making them sick.⁴³ Dangote's urea plant in Ethiopia relies on natural gas from the Ogaden Basin, where locals say toxic waste from oil and gas operations are to blame for a deadly sickness that has been affecting their villages since exploration began in 2014.⁴⁴

Similarly, people living near the phosphate factories of the Groupe Chimique Tunisien in Gabès, Tunisia, suffer from chronic diseases, intoxication and asphyxiation. Local fishers and farmers say that waste from the factory has destroyed their fish stocks and poisoned their lands. The communities created an organisation, Stop Pollution, and in 2025 they held a general strike calling for the factories to be shut down. So far, the government refuses to act.⁴⁵

Big costs, few benefits

The harms from fertilisers extend well beyond their production sites. Chemical fertilisers are one of the leading contributors to climate change, responsible for more global greenhouse gas emissions than air travel.⁴⁶ Nitrogen fertilisers account for most of this pollution, and especially those produced with coal. At least two of the new urea factories under construction in Africa – in Tanzania and Zambia – are coal-based.

Chemical fertilisers are also driving an environmental crisis in the world's lakes and oceans. Most of the nitrogen and phosphorous used to grow crops leaks into lakes and other water bodies, causing algal blooms and dead zones in the oceans, where marine life cannot survive. While Africa is largely unaffected by this problem because of its low fertiliser use, any intensification will bring problems from run-off.⁴⁷

More chemical fertilisers also mean more chemical pesticides. When fertilisers are applied in high amounts, plants become vulnerable to pests and diseases. This is why high rates of chemical fertiliser consumption go hand-in-hand with high rates of pesticide use (see *Graphic 2*). These pesticides can have serious health consequences for farmers and farmworkers, especially women.⁴⁸

Fertilisers can degrade the fertility of soils over time too, forcing farmers to use more and more fertiliser to maintain productivity.⁴⁹ "In some areas like the southern highlands regions of Tanzania, where the use of chemical fertilisers started years back, soil fertility has been depleted and, as a result, farmers have to rely on high dosages of chemical fertilisers for them to produce," says Pius of MVIWATA.⁵⁰ This has knock-on effects. She

and her comrades conducted surveys of the areas heavily targeted by fertiliser promotion programmes. "The results were shocking. We found that farmers using the fertilisers as directed were the majority of those going to bed hungry, without the means to afford a balanced diet of local foods."

Even the Gates-funded AGRA has been forced to admit that the fertiliser subsidy schemes and promotion programmes it supported failed to address hunger. In the 13 countries it targeted to boost the use of fertilisers by small farmers, overall hunger increased by 30% between 2006, when AGRA was launched, to 2020.⁵¹

Fertilisers are not a magic bullet for food security, as fertiliser companies claim. In many African countries, fertiliser goes to crops that contribute little if anything to food security. In Côte d'Ivoire, 60% of fertilisers are used to grow cotton and cocoa. In Burkina Faso, half goes to cotton (down from a shocking 92% in the early 2000s).⁵² About 13% of the chemical fertiliser used in Kenya goes to grow tea for export, even though tea covers only 3% of the country's arable land.⁵³ Sugar cane is another major consumer of fertiliser across the region.⁵⁴

Even in places where chemical fertilisers is used to grow staple food crops, countries can still be reliant on food imports. Twenty percent of Egypt's national fertiliser use goes to wheat. But the country still imports half of its annual wheat needs.⁵⁵

If food production is increased through imported fertilisers made with fossil fuels, can this really be considered "food security"? Today's surging fuel prices make it evident that Africa's path to food sovereignty requires an alternative.

Changing course

The world is stepping into another crisis, with food prices expected to rise significantly because of the US-Israel war on Iran. African countries dependent on food imports will be hit hard once again, and once again governments, donors and corporations will be selling fertilisers as a solution. This approach was applied after the 2007-8 global food crisis, and it failed badly. It is time for a different direction.



Bosco and Veronica Kimani in their ecological farm (Kenya). Source: Greenpeace

African farmers have, over generations, developed highly productive food and farming systems that do not require chemical fertilisers. These systems are based on farmer knowledge, crop diversity and the use of traditional seeds and breeds adapted to local conditions. There are many efforts flourishing across the continent to enhance and expand these alternatives.

"As an African woman farming in arid Baringo, I practice organic farming because healthy soil and water conservation are essential for survival," says Veronica Kibor, a Kenyan farmer member of the Seed Savers Network. "I do not use chemical fertilisers, as they increase costs and weaken soil over time. Through composting, animal manure and mulching, I can improve soil fertility naturally, strengthen drought resilience and protect my family's food security. Sustainable agriculture empowers women farmers and safeguards the

future of our land and communities."⁵⁶

The Eastern and Southern Africa Small Scale Farmers' Forum (ESAFF), which brings together 5.5 million small farmers across 16 countries, is also working with its members to develop and promote ecological agriculture and farmer-managed seed systems. "I have never used pesticides because I have a lot of animal manure and home waste. The other alternative is the use of natural fertilisers and herbicides. These are accessible because we use natural materials and produce them ourselves," says Christine Nabwami, a farmer in Mityana district, Uganda, and member of ESAFF.

In West Africa, farmers' organisations like Béo-nèere in Burkina Faso, and Mali's Convergence des Femmes Rurales pour la Souveraineté Alimentaire, which represents 10,000 women farmers, are developing agroecological practices that successfully bypass chemical fertilisers.⁵⁷ The same

is true for *Nous Sommes la Solution*, a movement which represents 500 rural women organisations and 175,000 members in Burkina Faso, Ghana, Guinea, Mali and Senegal.⁵⁸

In North Africa, the Tunisian Network for Agroecological Transition is an example of collective action among farmers, together with others, to develop food systems without fertilisers.⁵⁹ The Tunisian Association of Permaculture, one of its members, has created the "Nourriture Citoyenne" ("Citizen Food") label for products that are grown without chemical inputs, like fertiliser, and that meet a host of other positive criteria as well.⁶⁰

Such initiatives point the way forward, but they need far more political, social and economic support. As Pius puts it, "A shift towards practices that ensure sovereignty of our nations, as well as freedom and rights of the producers and consumers is mandatory.

Most chemical fertilisers, apart from being unsustainable, are not even produced in our countries."⁶¹

A change of course off the chemical fertiliser treadmill and towards agroecology is even more urgent in the face of the climate crisis. Climate scientists are calling today for a 42% global reduction in fertiliser used by 2050, just to keep the planet liveable.⁶² This will be difficult in places where industrial food and farming systems dominate. Perhaps with the right support, African farmers can show the rest of the world the way out of the fertiliser trap. But we should not be fooled. Climate change is making food production harder, everywhere, especially in Africa. The onus is therefore on all of us to build more sustainable food systems without the crutch of chemical fertilisers and without the tremendous cost of corporate control that goes with them.

Africa's growing fertiliser connection with the Gulf

The US-Israel war on Iran has drawn attention to how dependent some African countries are on fertiliser imports from Gulf countries. Sudan imports over half of its fertilisers from Gulf states, Tanzania 31%, Somalia 30%, Kenya 26% and Mozambique 22%.⁶³ The Saudi Arabian company Ma'aden is now one of the leading suppliers of phosphate fertiliser to Africa, accounting for 40% of Zambia and Zimbabwe's imports in 2023.⁶⁴ Even African countries that produce their own fertilisers, such as Morocco and Egypt, depend on Gulf countries for raw materials like sulphur, ammonia and gas.⁶⁵

Iran is also a key supplier. In 2023, the Iranian firms Pardis Petrochemical Company and Shiraz Petrochemical Company accounted for 14% of Africa's nitrogen fertiliser imports. South Africa took a third of those imports, followed by Mozambique (24%), and Nigeria (17%).⁶⁶

Connections with the Gulf go beyond trade. In recent years, Emirati and Saudi companies have increased their investments in fertiliser production in Africa. In Egypt, the sovereign wealth funds of Saudi Arabia and Abu Dhabi have together acquired over 40% of two of Egypt's largest nitrogen fertiliser producers, Abu Qir Fertilisers and Misr Fertilizers Production Company. This gives them privileged access to other African markets via the African Continental Free Trade Area.⁶⁷ The UAE's Sharkia Group also owns Futurefert, one of the largest fertiliser factories in Egypt.⁶⁸

Other Gulf players investing in the region are Fertigllobe (UAE) and SABIC (Saudi Arabia). The first has facilities in Egypt, Algeria and South Africa, and claims to be the largest nitrogen producer in the Middle East North Africa region.⁶⁹ SABIC does not disclose its sales in Africa, but controls 49% of ETC Holdings, a subsidiary of the Mauritius-based Export Trading Group, which is a leading fertiliser trader in several African countries.⁷⁰

Table: Main fertiliser companies in Africa

Nitrogen fertilisers.

Share of total nitrogen fertiliser consumption in Africa: 61%

Consumption in 2023: 5 million tonnes

Company	Country	Significance of sales in the region	Notes
Yara	Norway	In 2023, the company sold over a million tonnes of nitrogen fertilisers to African countries, equivalent to 22% of the region's consumption. Its market share varies from country to country. According to some estimates, it controls 40% of Kenyan fertiliser imports and 35% of Rwandan imports.	Yara has subsidiaries in Egypt, Ghana, Kenya, Rwanda, South Africa, Tanzania and Zambia, and import terminal facilities in Dar Es Salaam, Durban and Mombasa. In 2015 it acquired Greenbelt, a leading distributor of fertiliser in Zambia, Malawi and Mozambique, and owner of three blending plants and warehouses.
Omnia	South Africa	The company reported sales of US\$594 million in the region in 2024.	Its main markets are in southern Africa, especially Mozambique, Zambia, and Zimbabwe.
Abu Qir Fertilisers	Egypt	Egypt's largest nitrogen fertiliser producer. The company reported sales of US\$455 million in 2024/2025. 70% of its sales are from exports.	Owned 21.5% by the Abu Dhabi sovereign wealth fund (ADQ) and 20% by Saudi Arabia's Saudi Egyptian Investment Company (SEIC).
Misr Fertilizers Production Company (MOPCO)	Egypt	In 2024, MOPCO recorded sales of US\$386 million, up 230% from 2023. 75% of its sales come from exports to 16 countries.	ADQ and SEIC each hold a 20% and 24% stake in the company, respectively. MOPCO owns the largest nitrogen plant in the country and plans to build a green ammonia plant in Damietta to produce 150,000 tonnes of green ammonia by 2027.
Fertiglobe	UAE	In 2024, sales in Africa were US\$295 million.	Fertiglobe is a joint venture between the Dutch fertiliser company OCI and the UAE's ADNOC Fertilisers (which holds 86%). It has facilities in Egypt, Algeria and South Africa.
SABIC	Saudi Arabia	Nitrogen and phosphate fertiliser production is a small but significant part of its business, with sales amounting to US\$2.8 billion in 2024. The company produced 8.4 million tonnes of fertilisers in 2024, but sales in Africa are not disclosed.	SABIC controls 49% of ETC Holdings (EIHL), a subsidiary of the Mauritius based Export Trading Group (ETG).

Company	Country	Significance of sales in the region	Notes
Dangote	Nigeria	Regional sales from its nitrogen fertiliser factory in Nigeria are not disclosed, but 77% of production is exported out of Nigeria, including 37% to the US.	Owned by Nigerian businessman Aliko Dangote, it is the leading nitrogen fertiliser producer in the country. It operates Africa's largest granulated urea fertiliser plant in Lekki Free Trade Zone, with a production capacity of 3 million tonnes. Dangote is pursuing a major expansion in Nigeria and a US\$2.5 billion urea plant in Ethiopia.
Indorama Eleme Fertilizer & Chemicals Limited	Nigeria	The company currently has a production capacity of 2.8 million metric tons of nitrogen fertiliser. It mainly serves Nigeria's domestic market, but has plans to export.	The company is majority owned by the Singapore-based Indorama Group, with minority stakes held by the Nigerian and Rivers State governments. It produces 1.4 million tonnes of urea annually at its Rivers State factory. The company received US\$1.2 billion in financing in 2024 from the World Bank's IFC, AfDB, the Dutch and British development banks and others to expand its production and exports.
Eurochem	Switzerland	Eurochem is one of Russia's largest exporters of nitrogen fertilisers. It does not disclose its sales to Africa, but Russia accounted for 9% of all African imports in 2023, with the main destinations being South Africa and Morocco	Eurochem is headquartered in Switzerland and is run by a complex trust structure, designed to shield the company from sanctions. However, it is understood that the ultimate beneficiary remains the Russian billionaire Andrey Melnichenko and his family.

Phosphate fertilisers

Share of total **phosphate fertiliser consumption** in Africa: 27%

Consumption in 2023: 2.2 million tonnes

Company	Country	Significance of sales in the region	Notes
OCP	Morocco	In 2024, OCP sales in Africa amounted US\$1 billion (~10% of the African fertilisers' market and 16% of the company's total revenue). In 2023, 45% of all phosphate fertilisers imported by African countries (in tonnes) were sourced in Morocco. But the share in the case of Nigeria reached 70%. Most likely by OCP, the main producer and exporter. Some estimates suggest that OCP accounted for 20% of Kenyan and 15% of Rwandan fertiliser imports in 2023	OCP Africa, launched in 2016, has subsidiaries in Benin, Burkina Faso, Cameroon, Côte d'Ivoire, Ethiopia, Ghana, Kenya, Nigeria, Rwanda, Senegal, Tanzania, Zambia, and factories in Morocco, Nigeria and Ghana. In 2021, OCP and Ethiopia's government inked an agreement to establish a large fertiliser plant in Dire Dawa, but the facility is not operating yet. Part of OCP's phosphates are shipped out of Western Sahara, illegally annexed by Morocco.

Company	Country	Significance of sales in the region	Notes
Ma'aden	Saudi Arabia	In 2024, Ma'aden's sales in Africa were US\$694 million (~7% of the African fertilisers' market, and 15% of the company's total revenue).	Ma'aden operates mainly in Eastern and Southern Africa with regional offices and commercial partnerships. Its subsidiaries are located in South Africa, Malawi, Mozambique, Seychelles, Zambia, and Zimbabwe. The fertiliser distribution is ensured through its Mauritius-based subsidiary Meridian Consolidated Investments (MCIL), which has fertiliser granulation and blending plants, warehouses and port facilities in Malawi, Zimbabwe, Zambia and Mozambique.
PhosAgro	Russia	PhosAgro sales in Africa were 548,000 tonnes in 2024. It accounts for a third of Russian exports to the region. The country supplies 10% of the phosphate fertilisers imported into Africa.	The main destination for the company's sales are South Africa, Mozambique, Cameroon, and Ethiopia.

Phosphate fertilisers
Share of total potash fertiliser consumption in Africa: 12%
Consumption in 2023: 1 million tonnes

Company	Country	Significance of sales in the region	Notes
Nutrien	Canada	In 2023, Canada supplied 11% of all African imports of potash fertilisers. Its main market, accounting for a third of all exports to the region is Morocco, followed by Côte d'Ivoire (23%), Cameroon (14%), and Benin (12%).	The top Canadian producer is Nutrien, but Mosaic (US) and K+S produce in Canada as well. These companies do not disclose sales to Africa. Nutrien and Mosaic export through Canpotex, a Canadian offshore marketing company owned by both corporations.
Arab Potash Company (APC)	Jordan	Africa represents only 2% of the company's sales. But in 2023, 72% of Egypt's potash fertiliser imports came from Jordan, most likely supplied by APC.	The company is majority owned by the Government of Jordan, with Kuwait and China also owning shares.
Belaruskali	Belarus	In 2023, Belarus was the first origin of African potash fertiliser imports, accounting for 17%. Top African destinations are Morocco (66%), Mali (12%) and Cameroon (8%).	Exports from Belarus are mainly from Belaruskali, the country's leading producer and exporter, but the company does not disclose its sales to Africa. Also, Belarusian fertiliser sales are routed through third countries to avoid sanctions.

Company	Country	Significance of sales in the region	Notes
K+S	Germany	Germany is the second largest supplier of potash fertilisers to Africa, accounting for 13% of all imports in 2023. South Africa, the top consumer of potash fertilisers in the region, absorbs 44% of German exports to Africa.	K+S is the leading potash fertiliser producer in Germany. The company does not disclose its sales to Africa, but in South Africa, Kenya and Uganda, where its subsidiaries are located, German fertilisers accounts for over 30% of imports.

All nutrients

Company	Country	Significance of sales in the region	Notes
Export Trading Group (ETG)	Mauritius	According to some estimates, the company's market share in Eastern Africa's fertilisers imports is around 35-40%, and 30-40% in Southern Africa.	ETG is a major commodity trader of agricultural products and inputs (pesticides, seeds, fertilisers), 31% owned by the Japanese corporation Mitsui. It imports and distributes fertilisers in Africa, with 16 blending plants. It is particularly active in Eastern and Southern Africa, with infrastructure for processing, storage and logistic facilities. The main ETG subsidiaries operating in the fertiliser sector are located in Tanzania, South Africa, Zimbabwe and Zambia. The company also recently acquired Yara Côte d'Ivoire.

Compiled by GRAIN from research reports, media and industry sources.

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