



EU Fertiliser Market analysis

*European Commission, DG
Agriculture, E.1*

EU Fertilisers market analysis

Fertiliser

Market data on fertilisers in the European Markets provided by the European Commission's agricultural and rural development department. Browse visualisations about imports, exports, average prices and production.

Dashboards & Reports



Fertiliser prices

Mineral fertiliser prices increased in 2022 and then started to decrease as from the end of 2022. These visualisations show monthly EU-level prices evolution for 3 classes of fertilisers aggregated by nutrient; Nitrogen (N), Phosphorus (P) and Potash (K) from June 2019 to the present in Euro per tonne.



Fertiliser production

The European Fertiliser Industry has more than 120 production sites across Europe. Production of fertilisers in the EU is distributed geographically among Member States, so that they can quickly serve the main users (farmers). These visualisations show annual production per Member State of five groups of fertilisers and two raw materials (ammonia and phosphates) since 2013. Statistics are also available for a selected number of fertilisers products (subgroup).



Fertiliser trade

Monthly import and export volumes per Member State and per external partner for five classes of fertilisers and two raw materials (ammonia and phosphates) since 2010. These visualisations are based on Eurostat's COMEXT dataset except for the most recent 2 months, which are based on Customs Surveillance data. Statistics are also available for a selected number of fertilisers products (subgroup).



Fertiliser

Mineral fertilisers are classified on the basis of type and form of nutrients they contain; the major nutrients are nitrogen (N), phosphorus (P) and potassium (K).

Farmer's exposure to fertiliser price volatility influences application rates and may threaten to drive down production.

Fertiliser production is an energy intensive industrial processes, and natural gas is the feedstock for manufacturing nitrogen based fertilisers; moreover European industry relies on potash and phosphorus imports as natural reserves in the EU are limited.

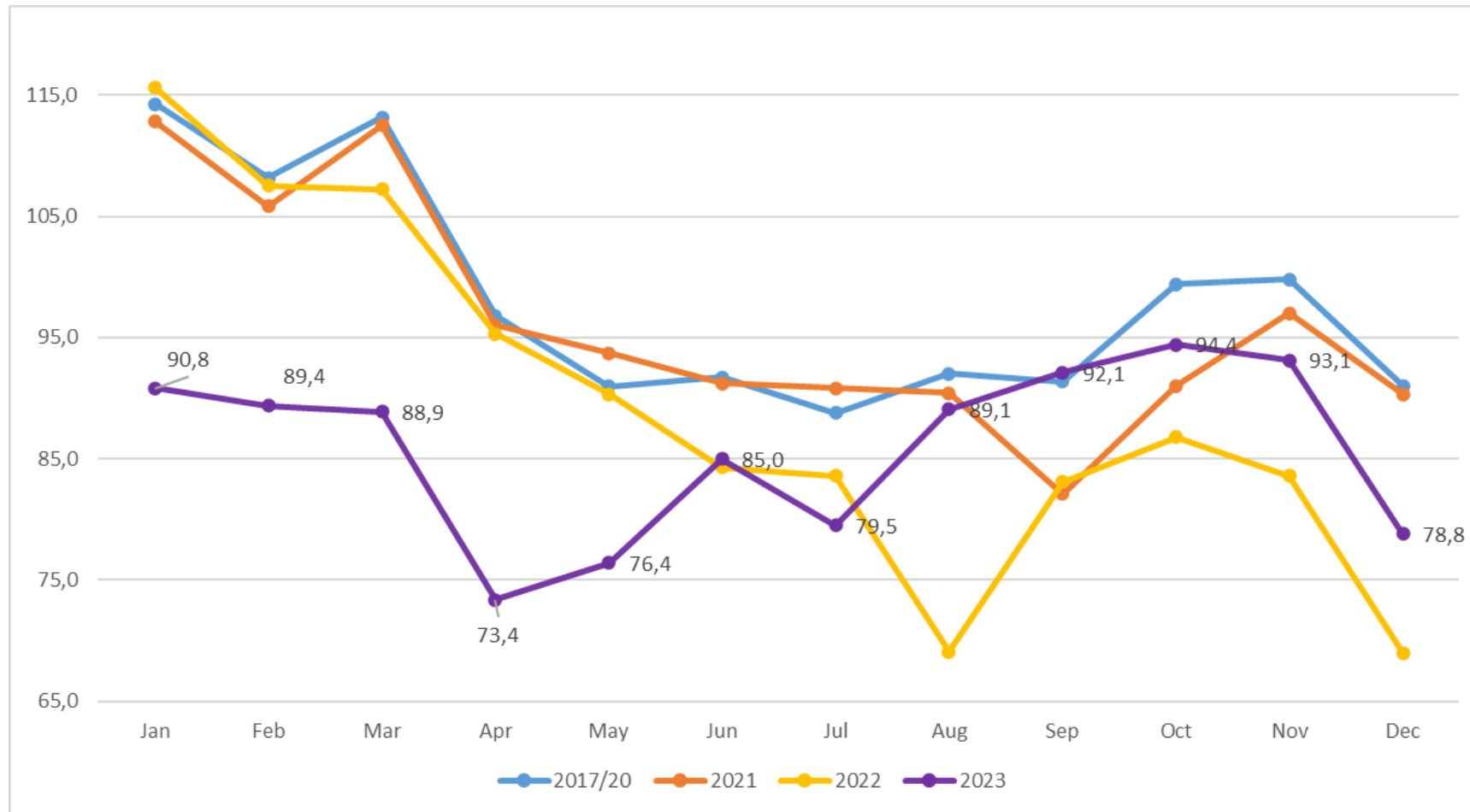
[European Commission | Agri-food data portal | Agricultural markets | Fertiliser \(europa.eu\)](#)



European
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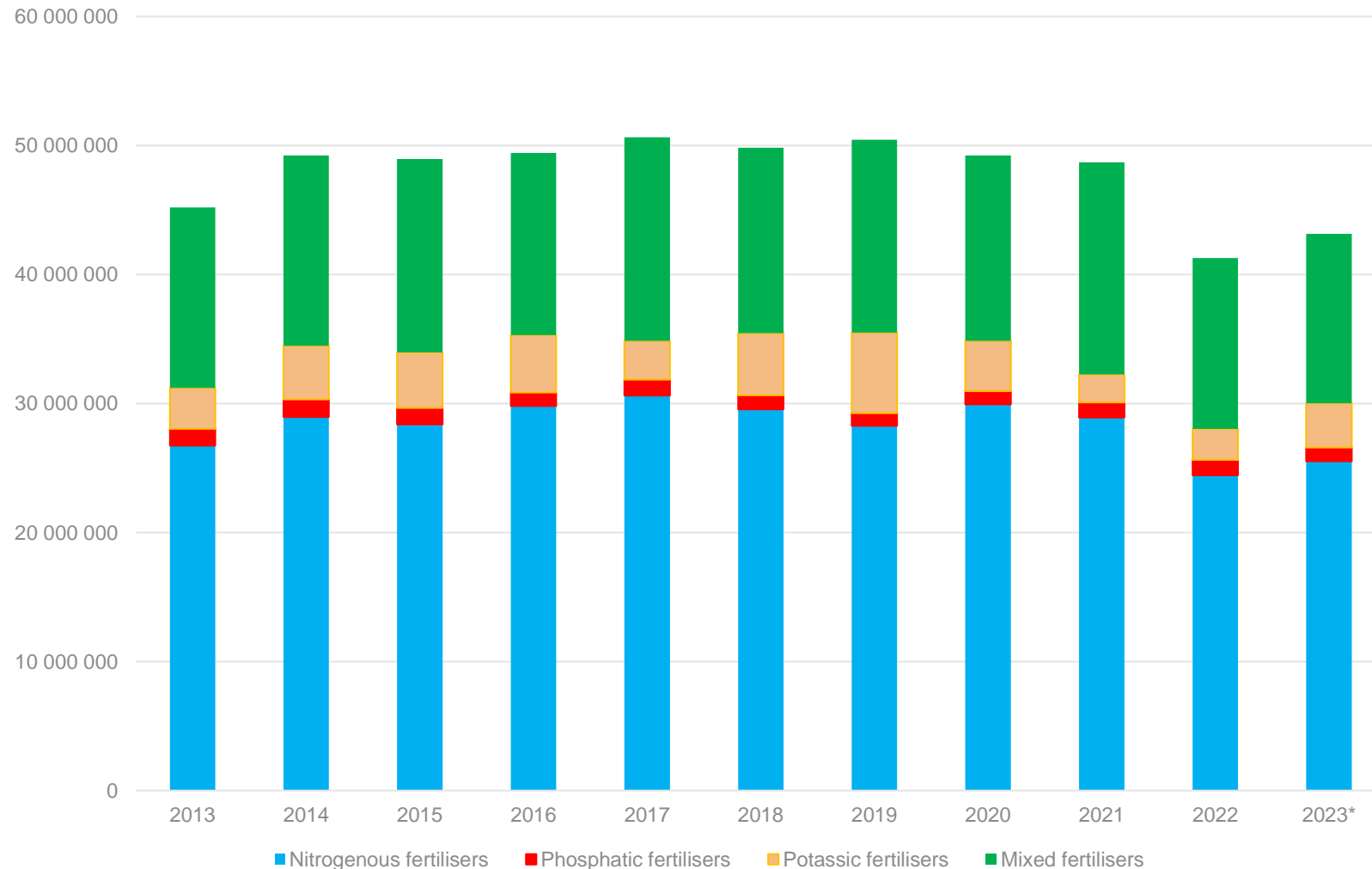
Production of fertilisers - index

Monthly index of production in volume of fertilisers and nitrogen compounds (EU-20)



Source: Eurostat, short-term business statistics

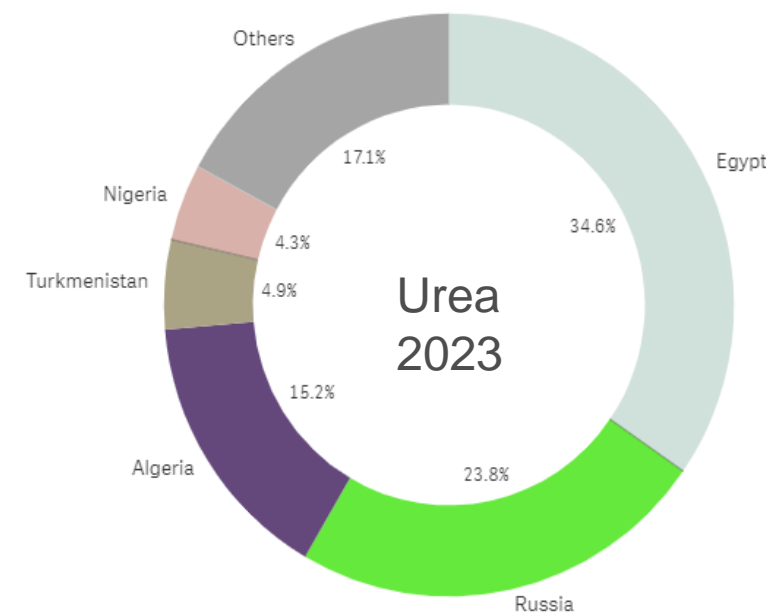
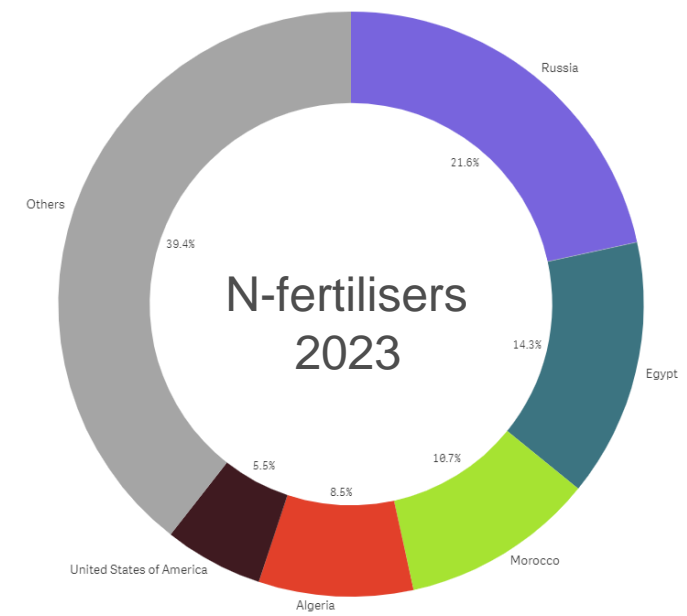
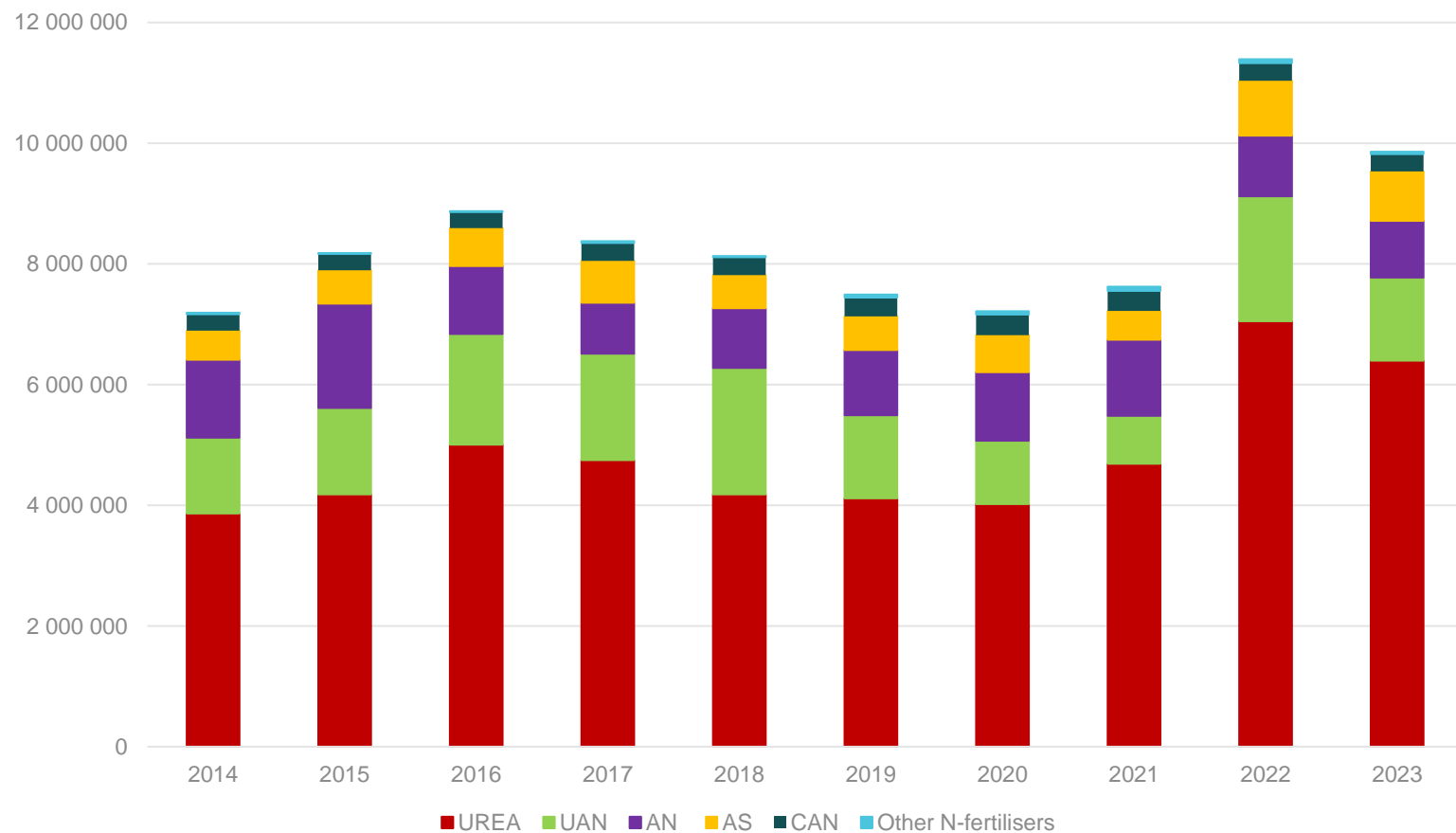
Production of fertilisers



*2023: Assumed production based on *Manufacture of fertilisers and nitrogen compounds indexes* and production data assessment

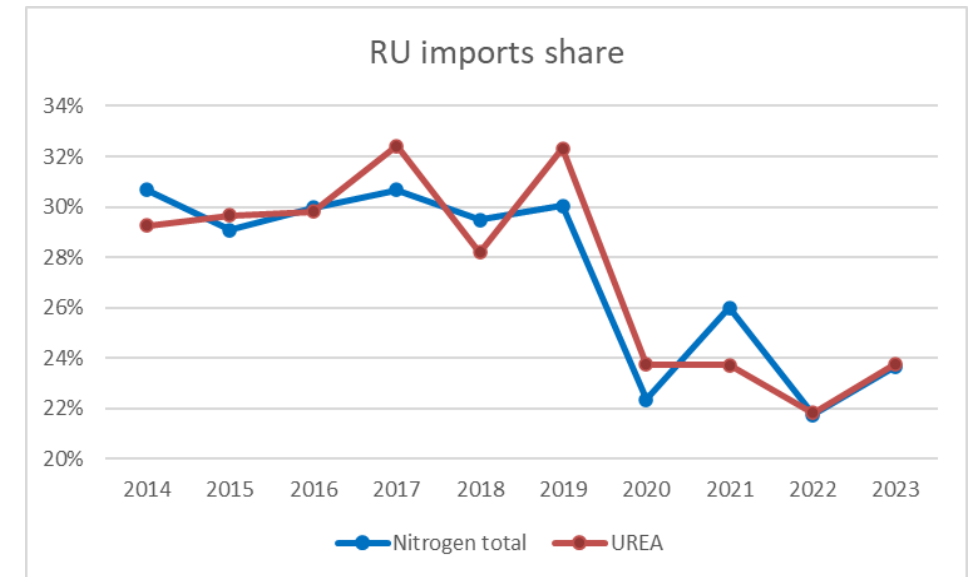
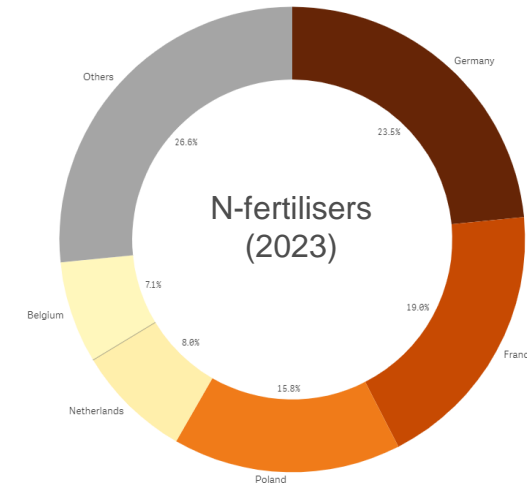
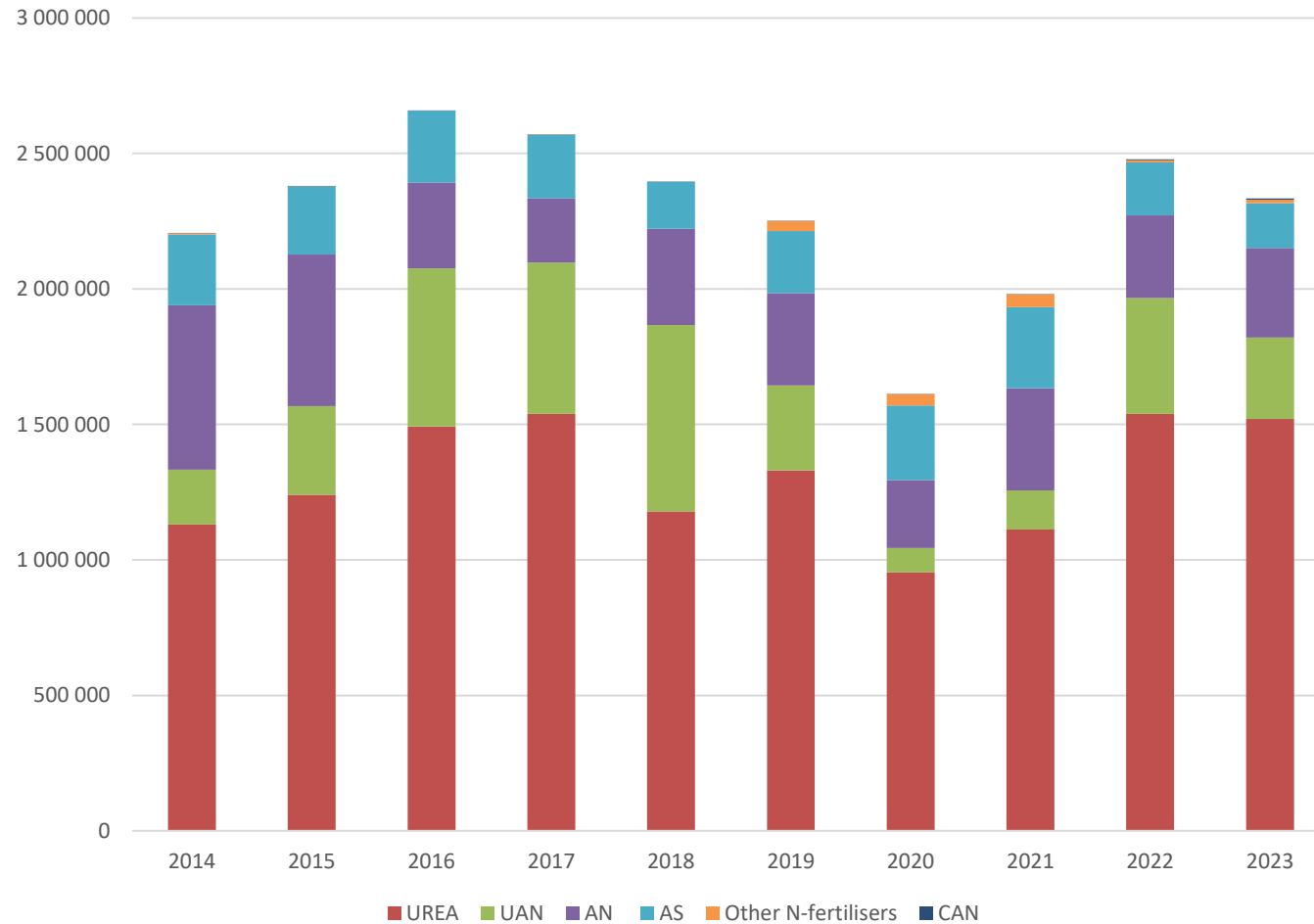
Source: Eurostat elaborated by DG AGRI

Nitrogen Fertilisers imports



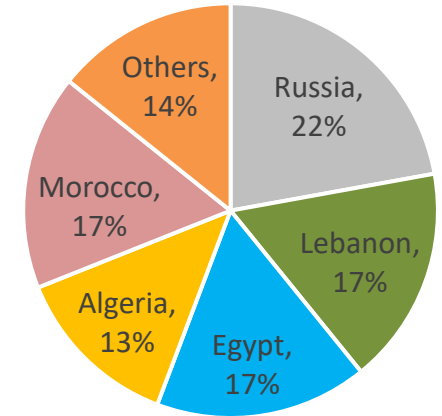
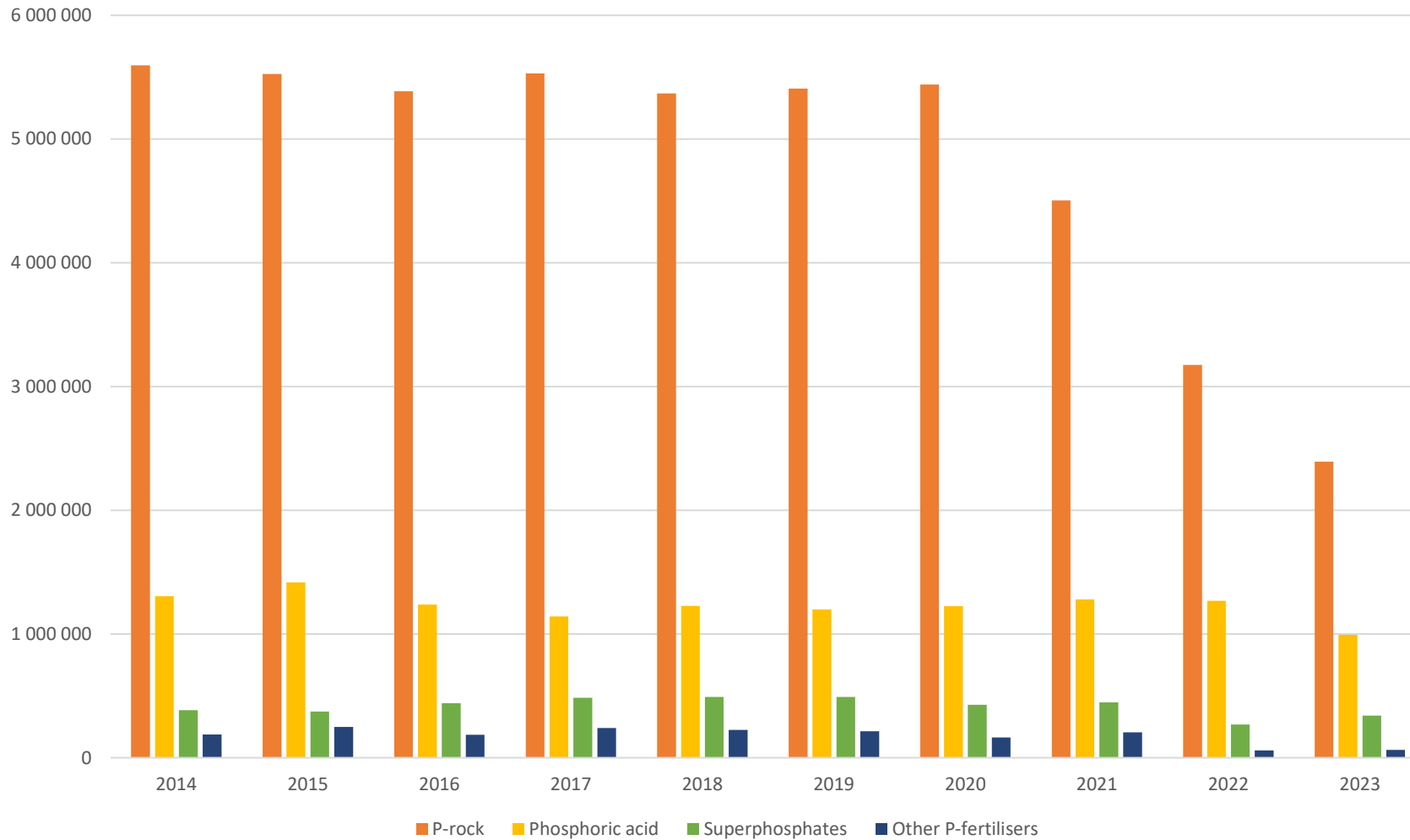
[Source : Agri-food data portal](#) [Fertiliser trade](#)

Nitrogen fertilisers imports from Russia



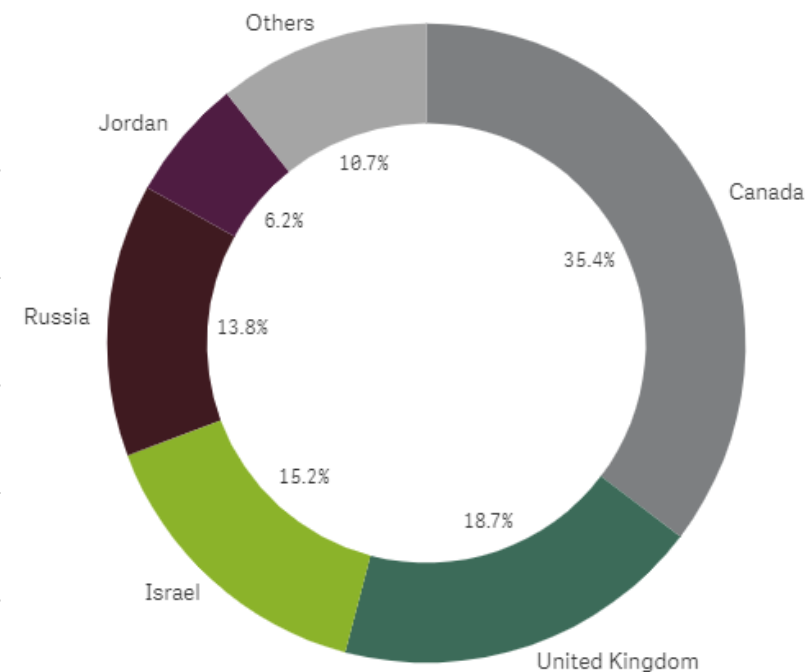
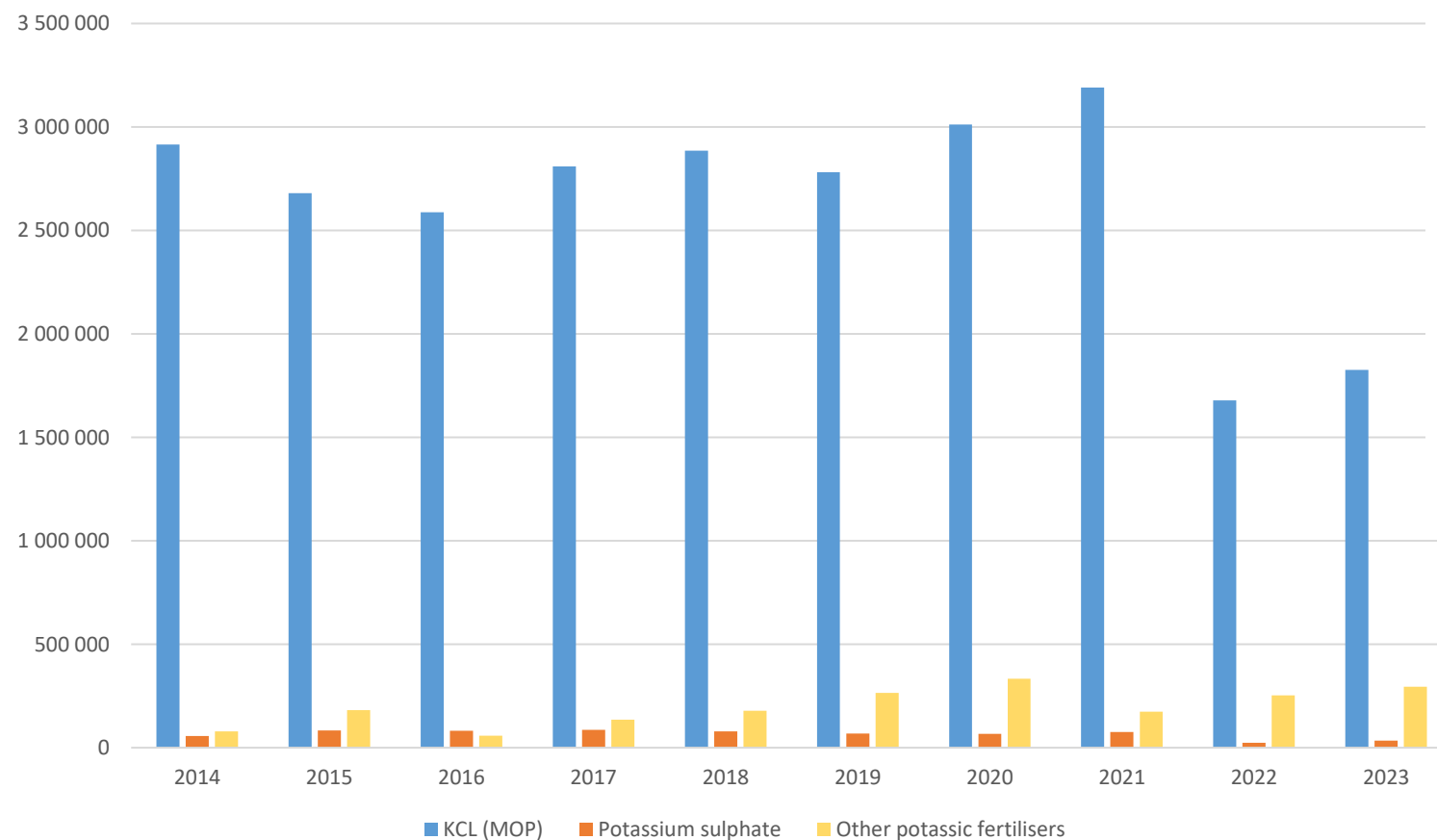
Source : Agri-food data portal Fertiliser trade

Phosphates and phosphatic fertilisers imports



P-rock
imports 2023

Potassic fertilisers imports



~85% of imports = MOP

Mid-East tensions

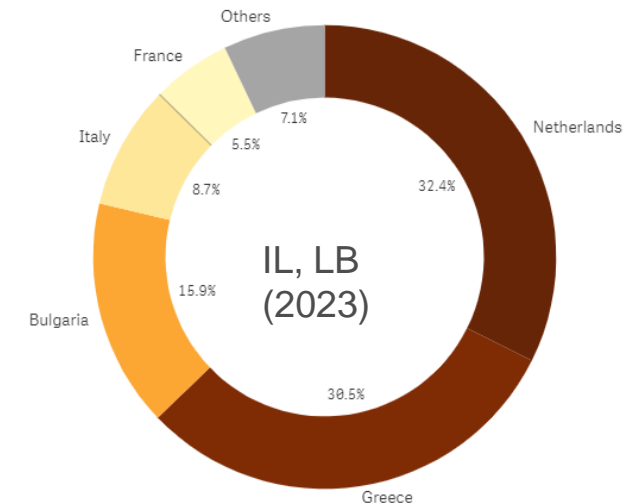
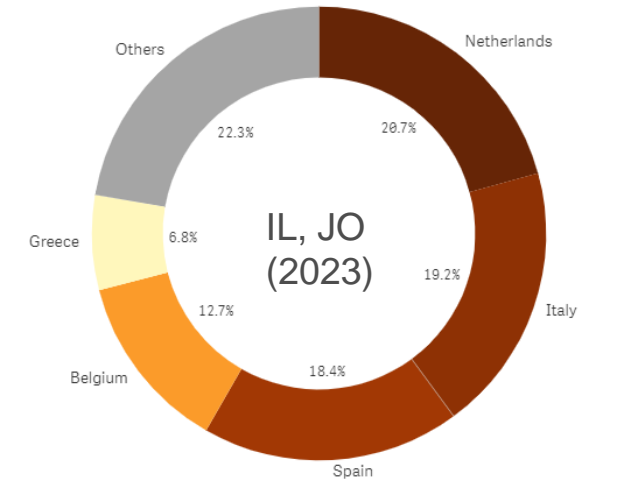
Possible implications for Phosphatic and Potassic fertilisers markets

EU Imports of **Potash and Potassic fertilisers**

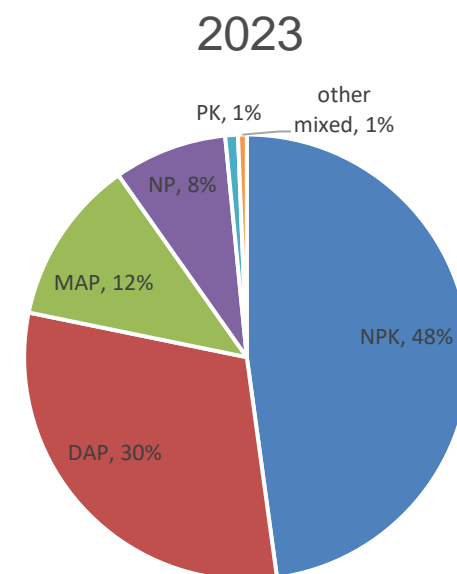
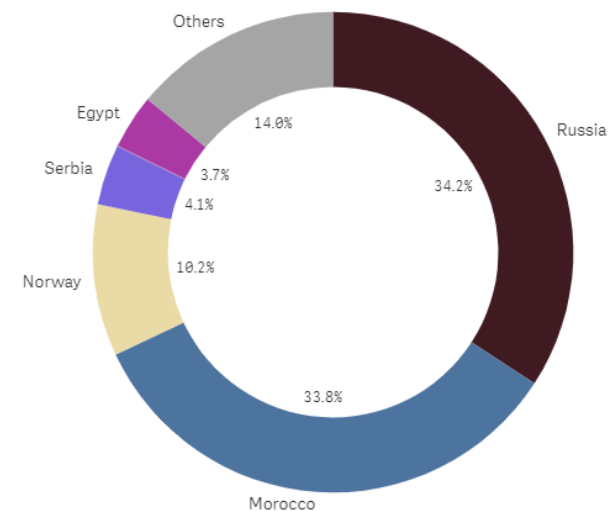
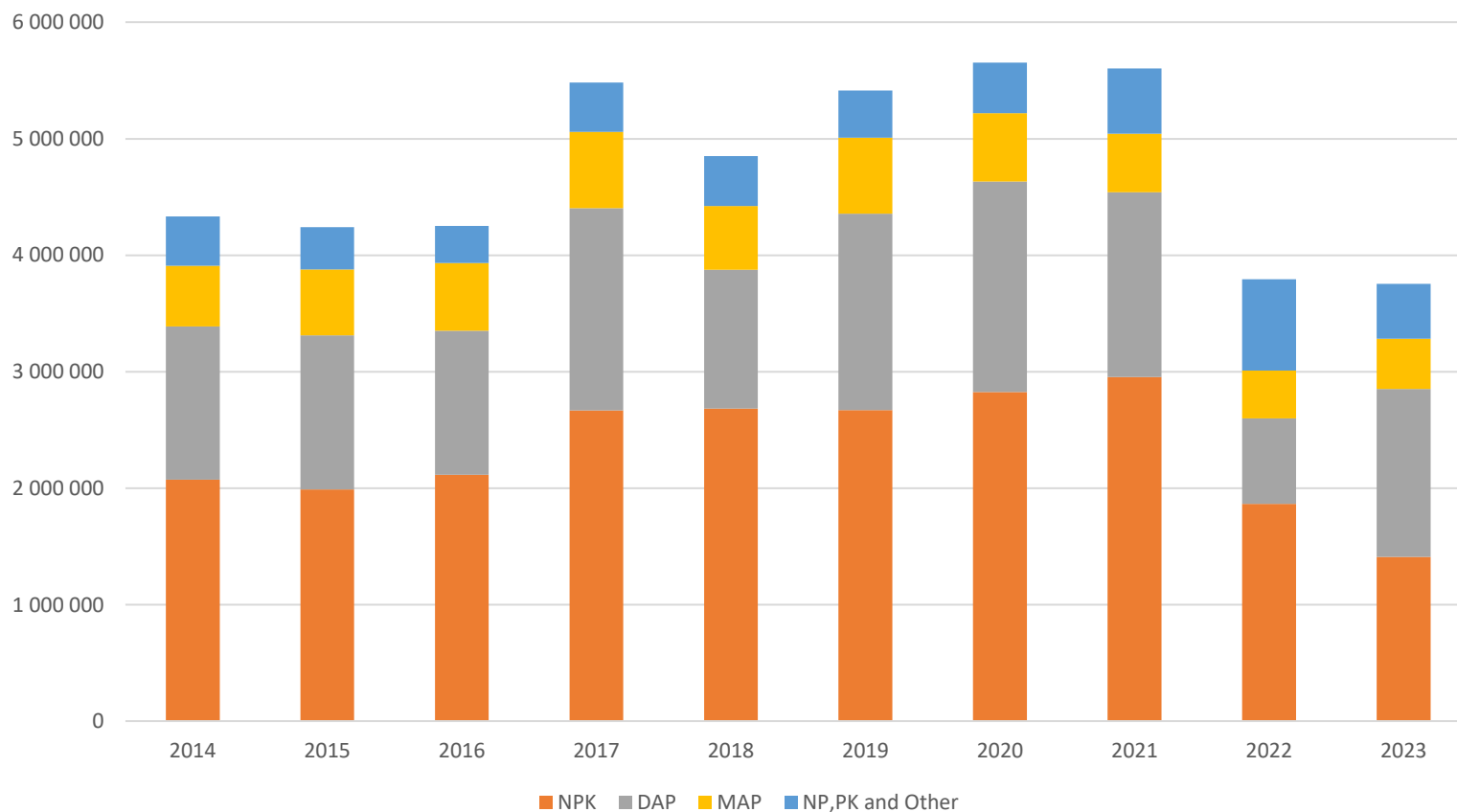
- Imports share from Israel increased in the latest years (post Belarus ban) from 6% in 2019 to 15% in 2023.
- Jordan supplies increased from 3% in 2019 to 6% in 2023.

EU Imports of **Phosphate and phosphatic fertilisers**

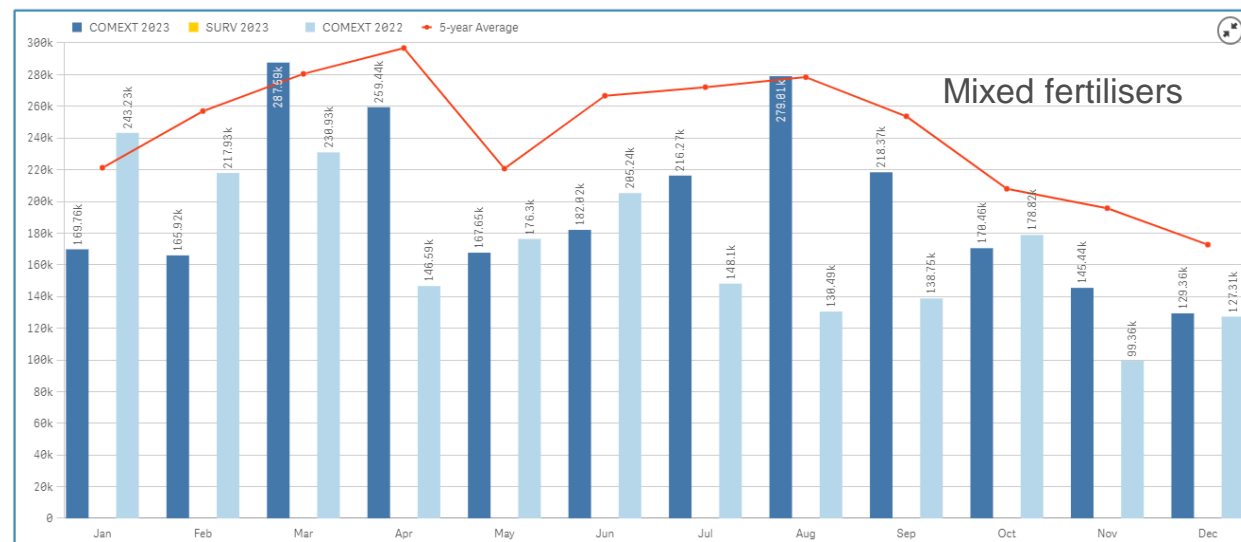
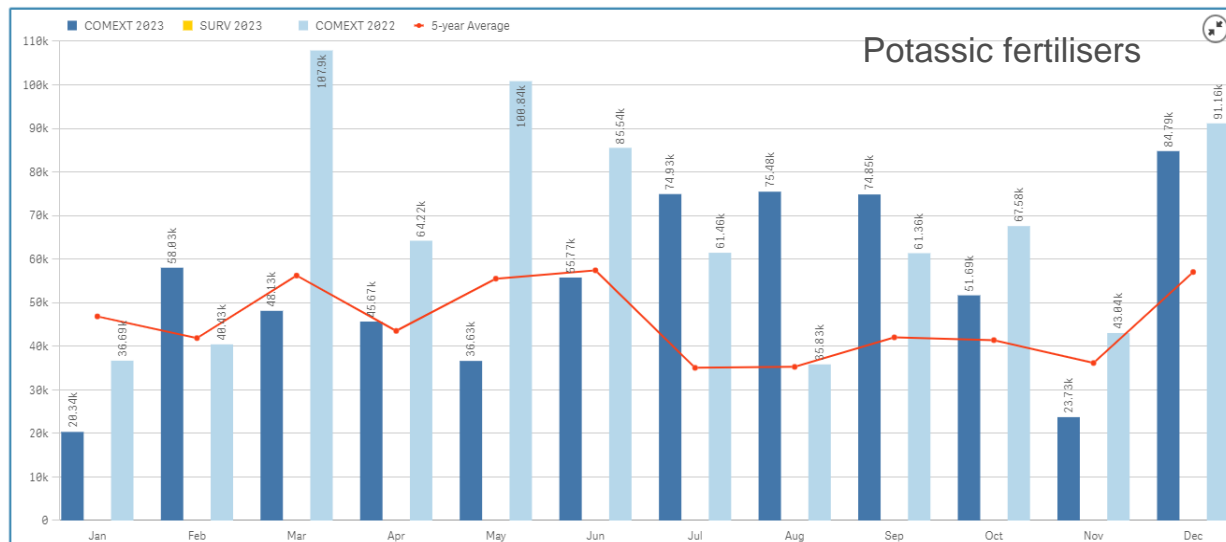
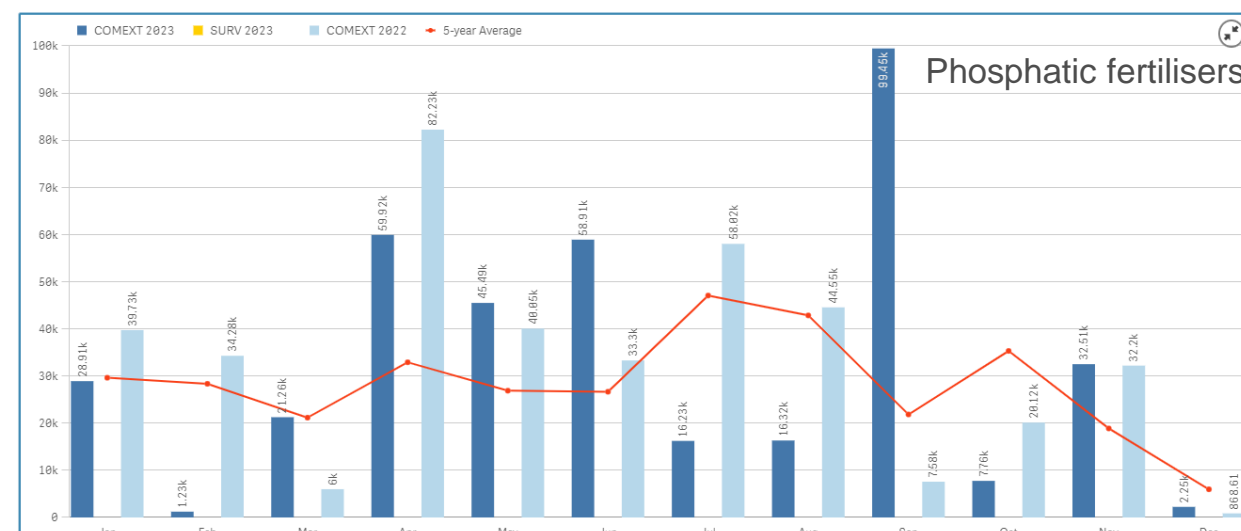
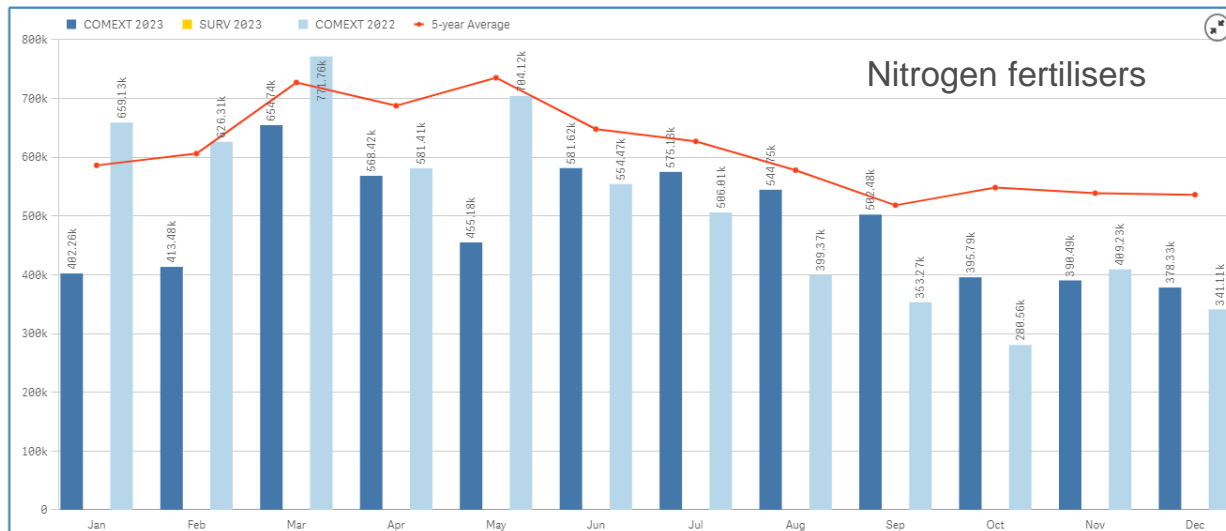
- Israel and Lebanon both represents about 12% of EU imports (2023).
- Overall imports share from Israel remain stable in 2023 compared with previous 5 years average
- Imports from Lebanon quadruplicated since 2022 compared with previous 5 years average



Mixed fertilisers imports

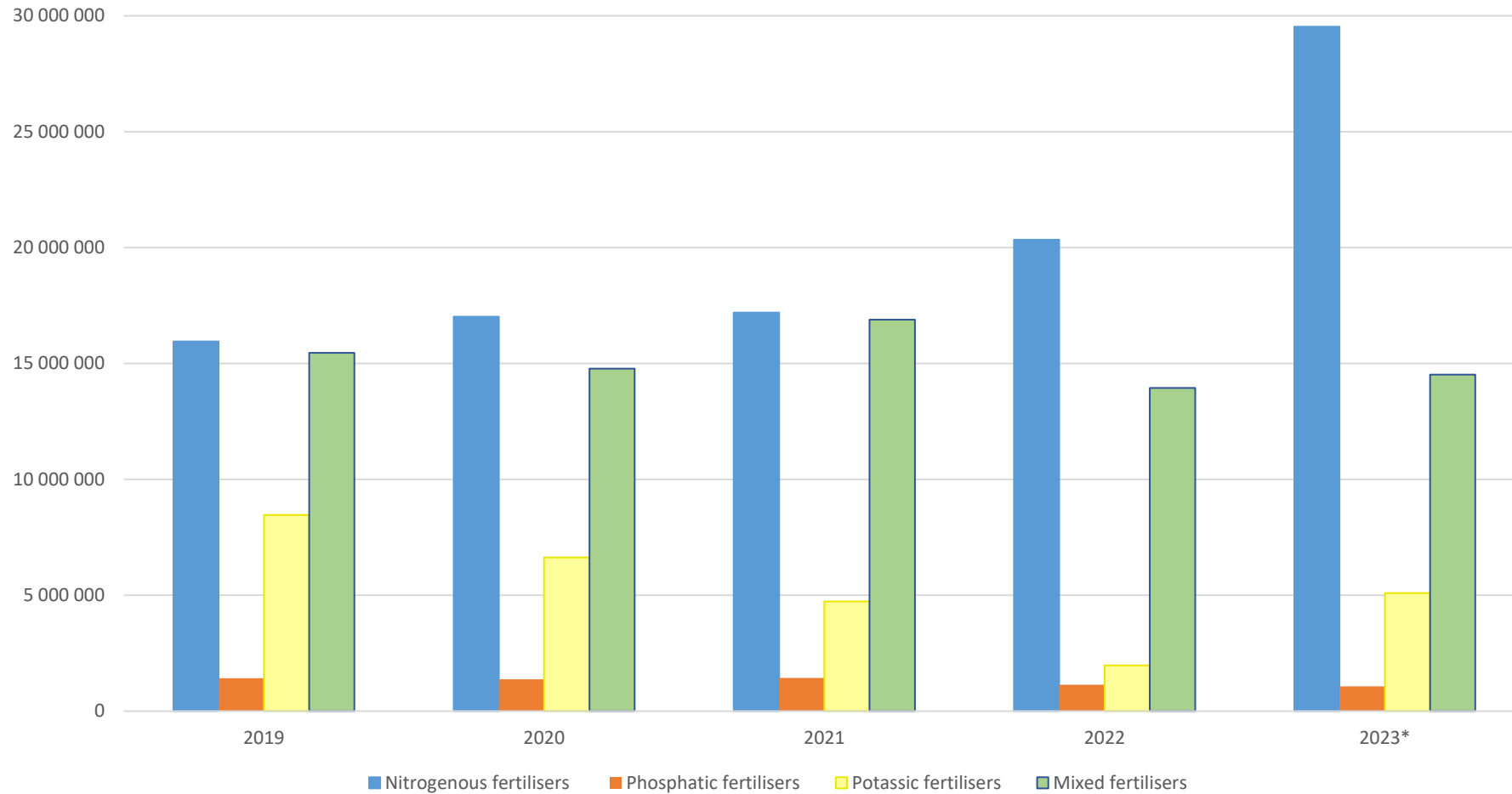


Fertilisers exports



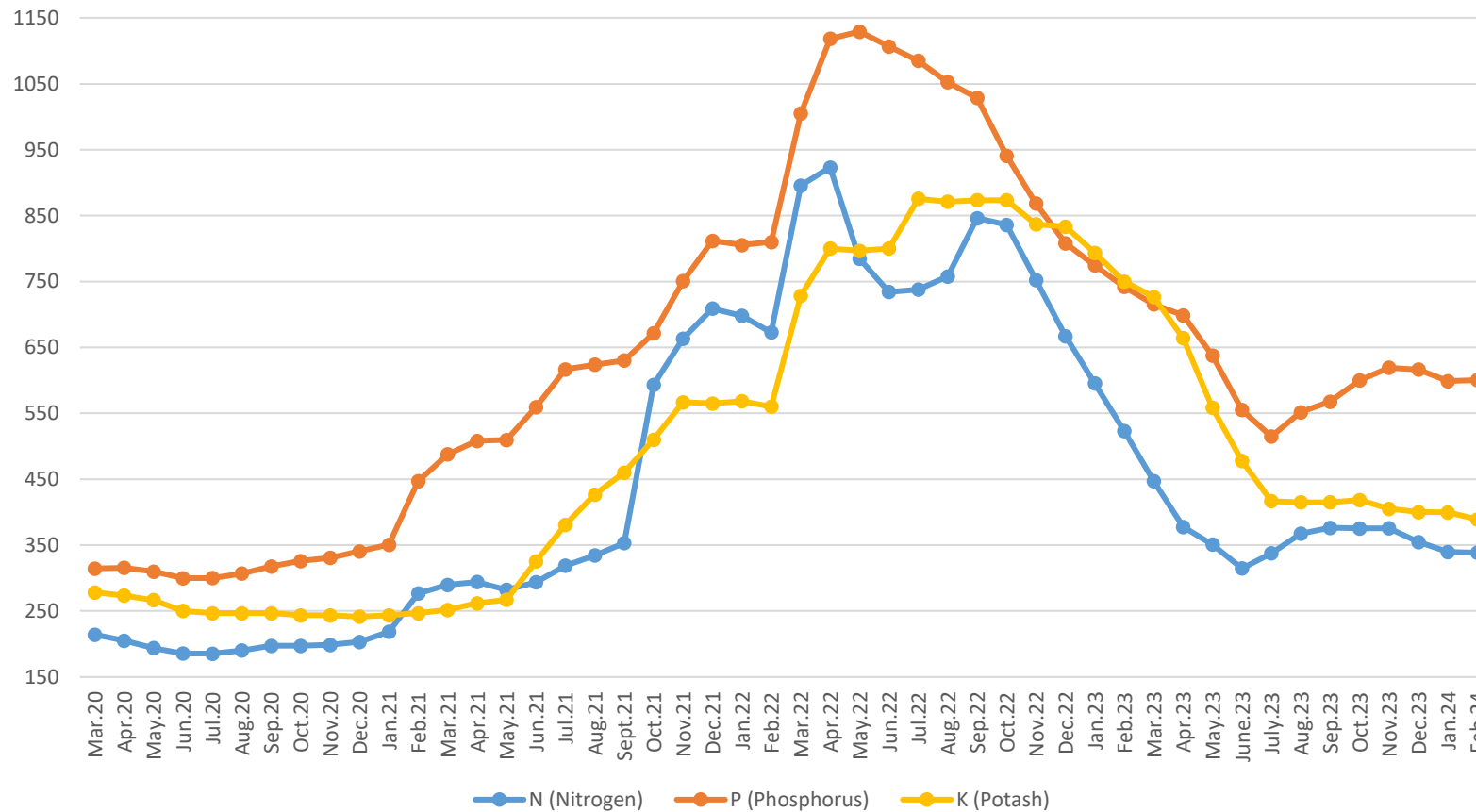
Stocks and consumption

Availability



**2023: production assumed based on DG AGRI calculations*

Average fertiliser prices by nutrient in EU



Average prices
Jan – Feb 24

Urea = 368€/t



DAP = 663€/t



TSP = 473€/t



MOP = 397€/t



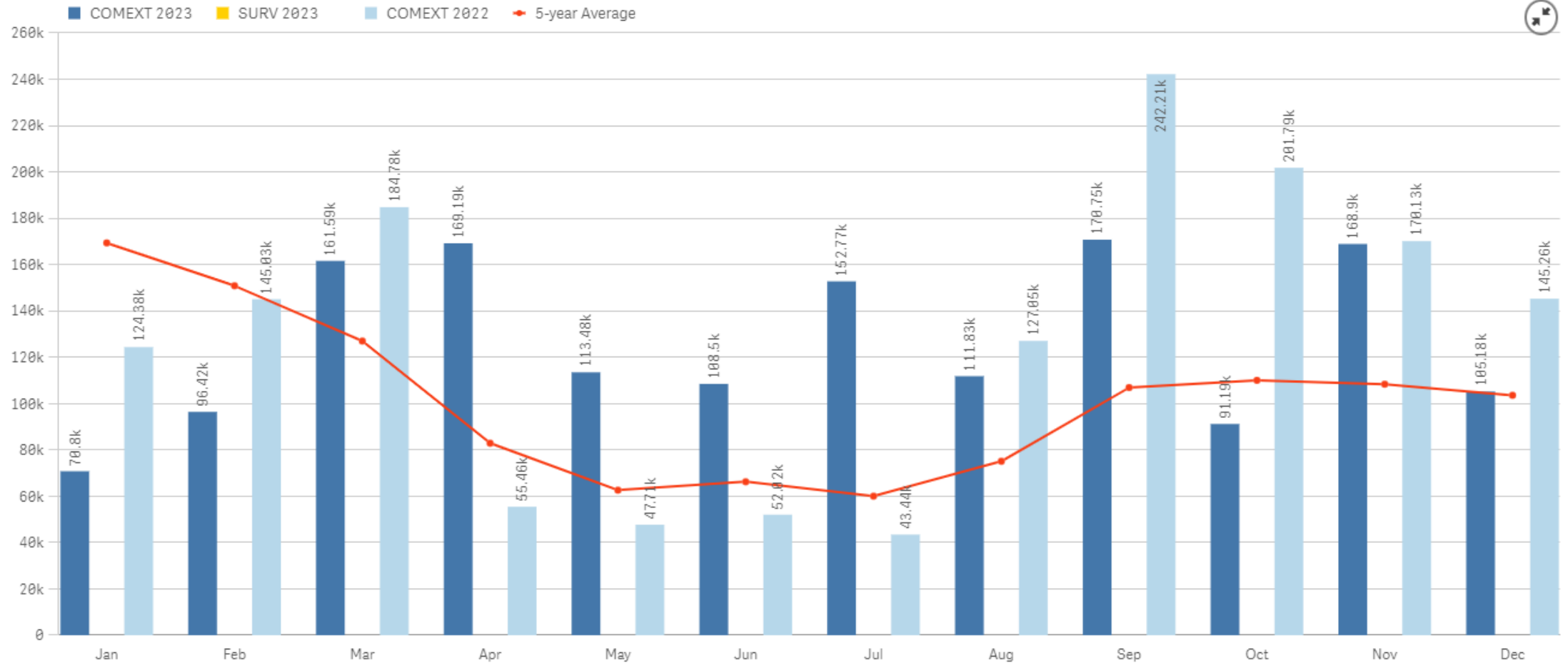
NPK = 451 €/t



[Fertiliser prices \(europa.eu\)](https://europa.eu)

Thank you

Urea imports from Russia



Source : [Agri-food data portal](#) Fertiliser trade