



EU Fertiliser Market analysis

Meeting of the Commission Expert Group on EU Fertilisers Market
Observatory

Brussels, 27 June 2023

*European Commission, DG
Agriculture, E.1*

EU Fertilisers market analysis

Market data

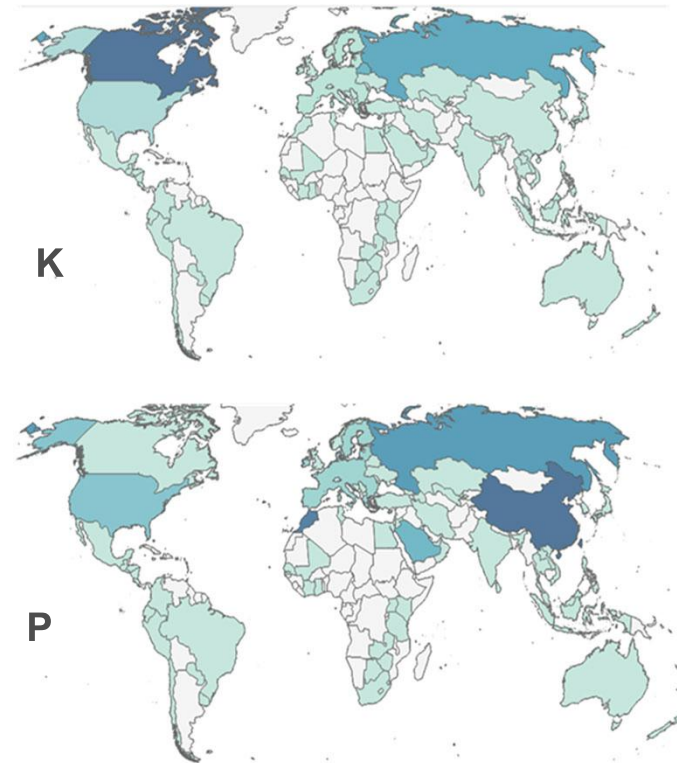
- Trade
 - ✓ Comext and Taxud data
- Production of input and fertilising products
 - ✓ Eurostat short term statistics, Prodcom
- Prices
 - ✓ Open access data and market intelligence prices in EU and globally
- Consumption
 - ✓ Estimation of nitrogen and phosphate consumption based on the gross nutrient balance



EU Fertilisers market analysis



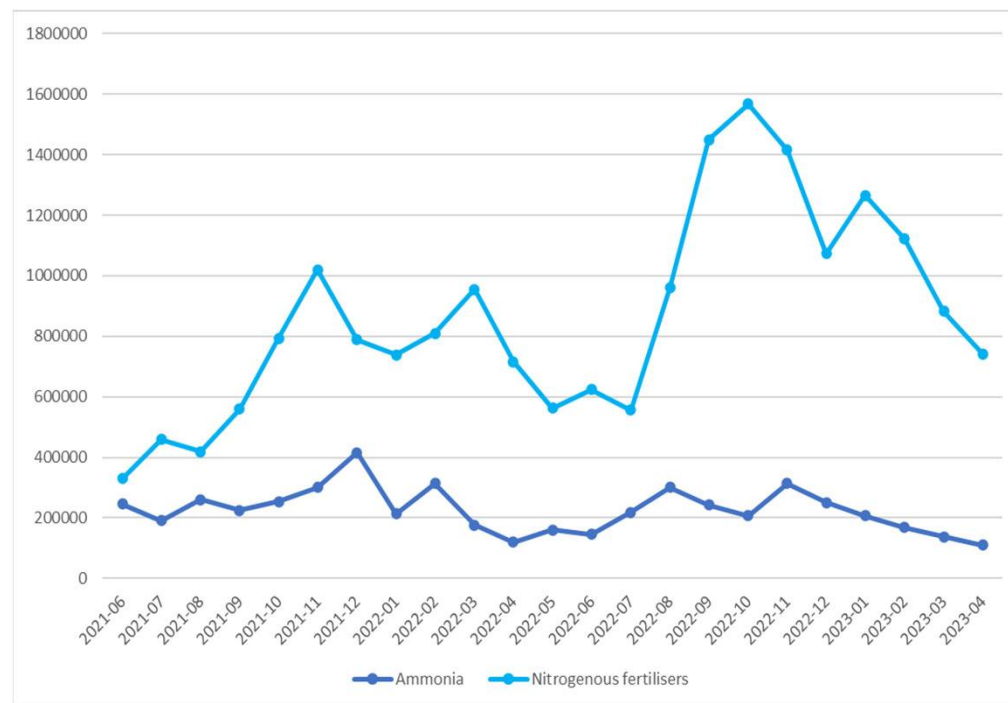
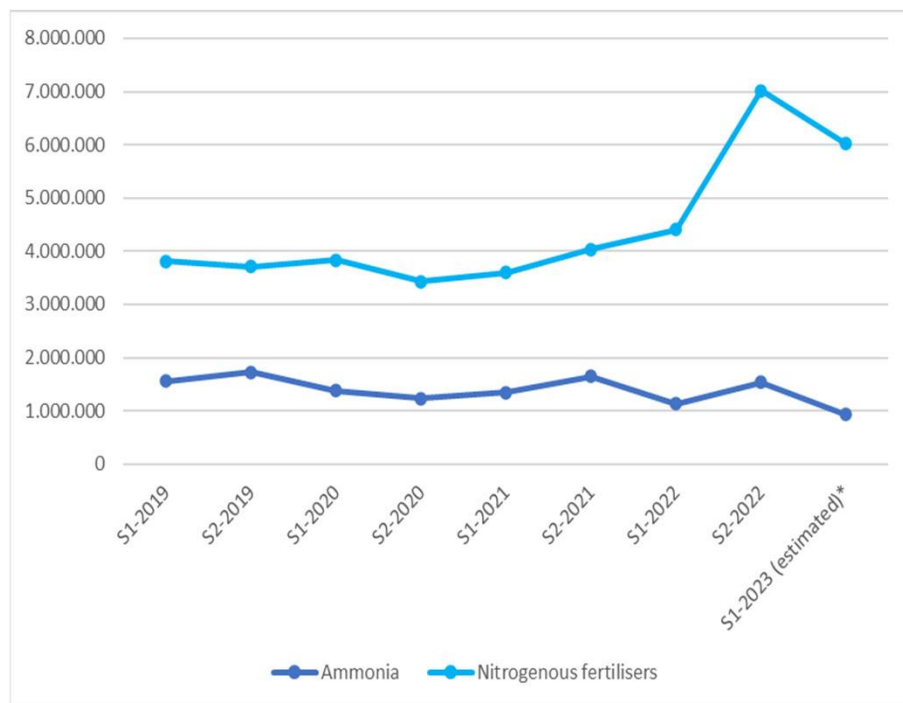
Source: TGN23/interactive-chart



Source: AMIS

Imports of N-fertilisers

EU imports of ammonia and total nitrogenous fertiliser (tonnes)

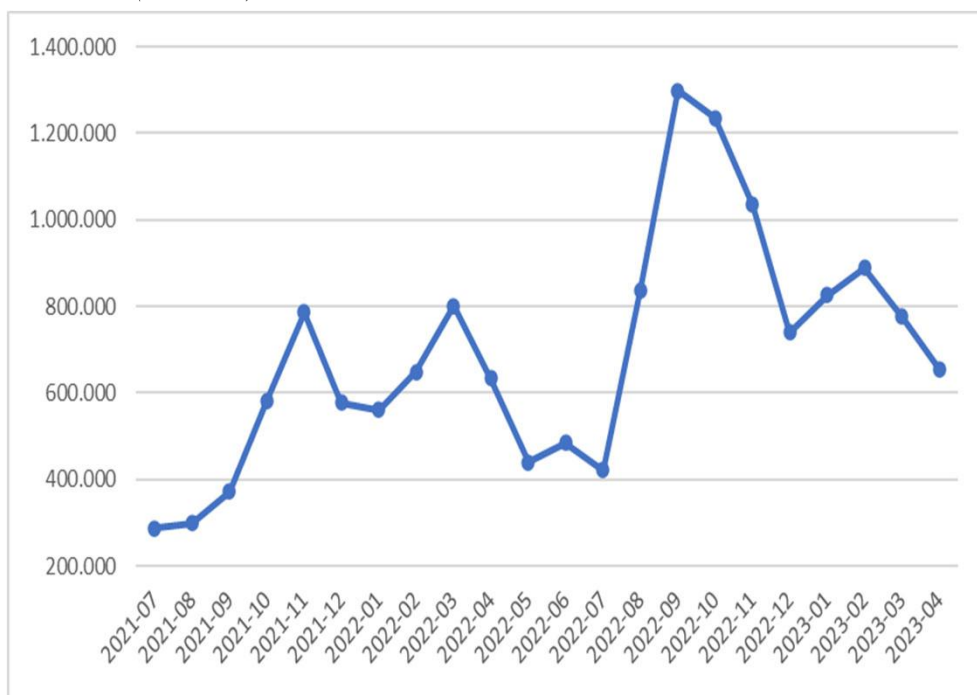


* data available until April 2023

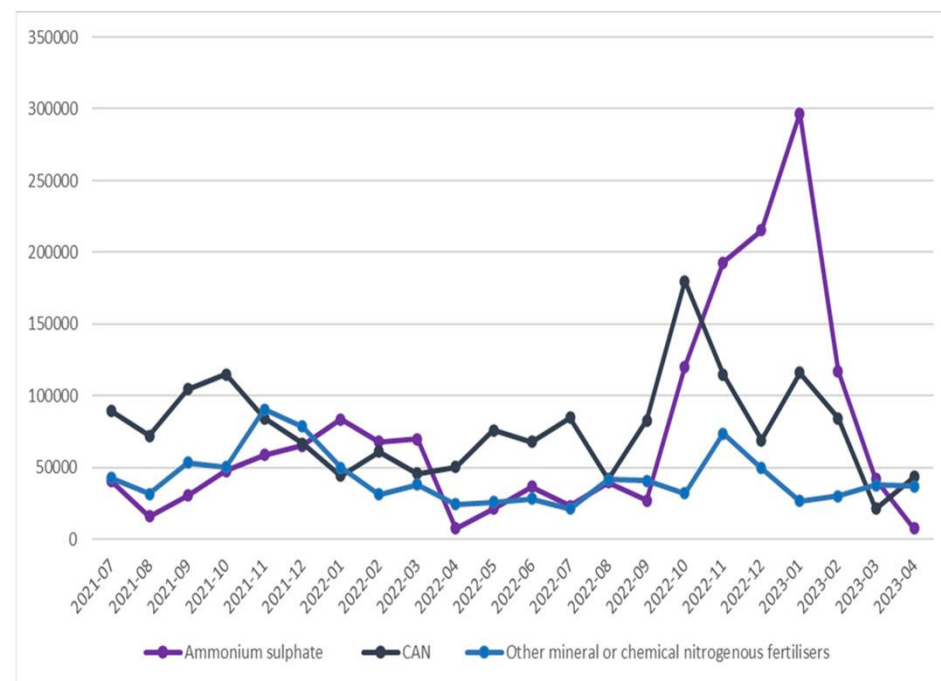
Source: Eurostat – Comext, elaborated by DG AGRI

Imports of N-fertilisers

EU imports Urea and mixture of Urea and ammonium nitrate (tonnes)



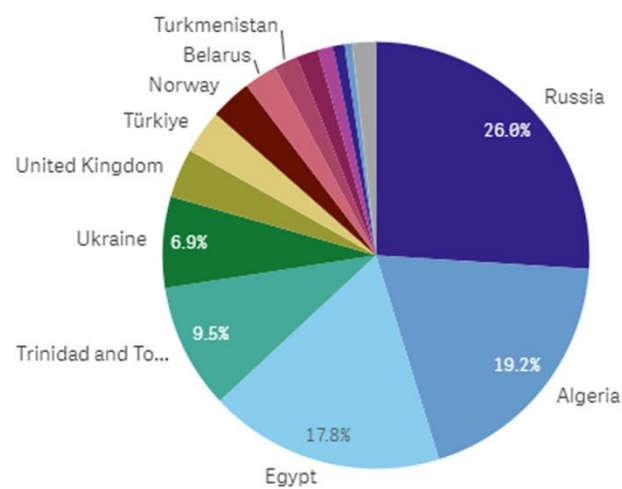
EU imports of other nitrogenous products (tonnes)



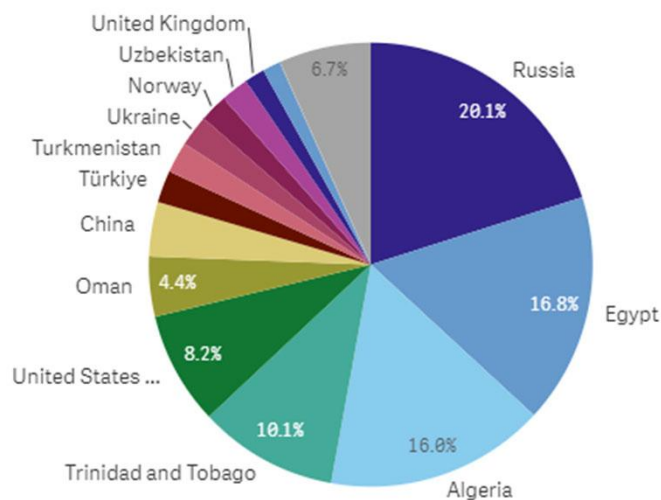
* data available until April 2023

Source: Eurostat – Comext, elaborated by DG AGRI

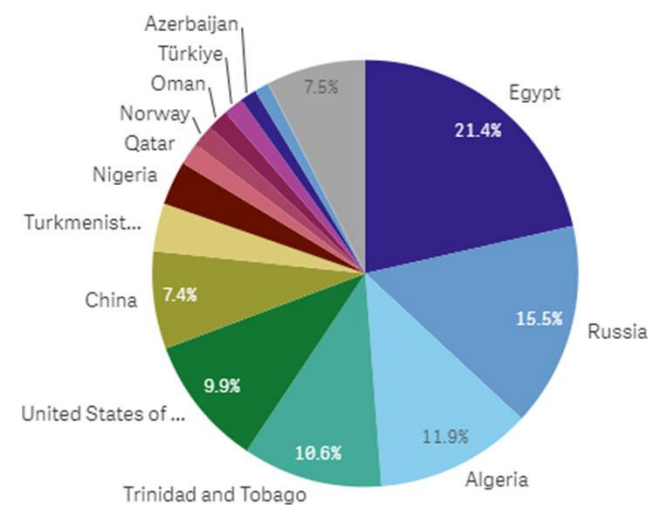
Nitrogenous fertiliser Imports top partners



2021



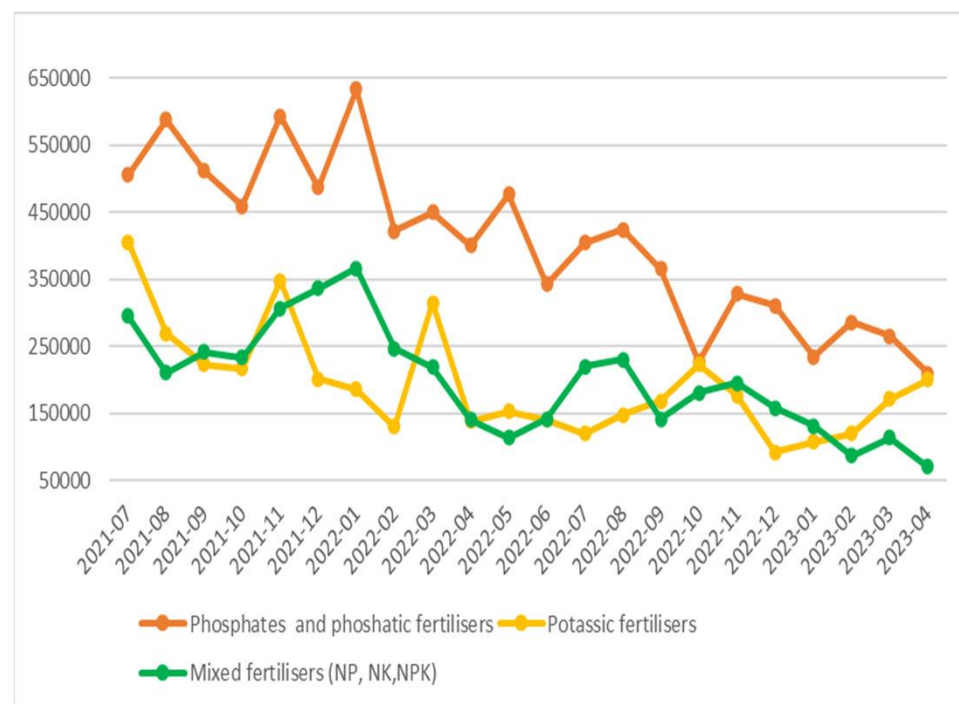
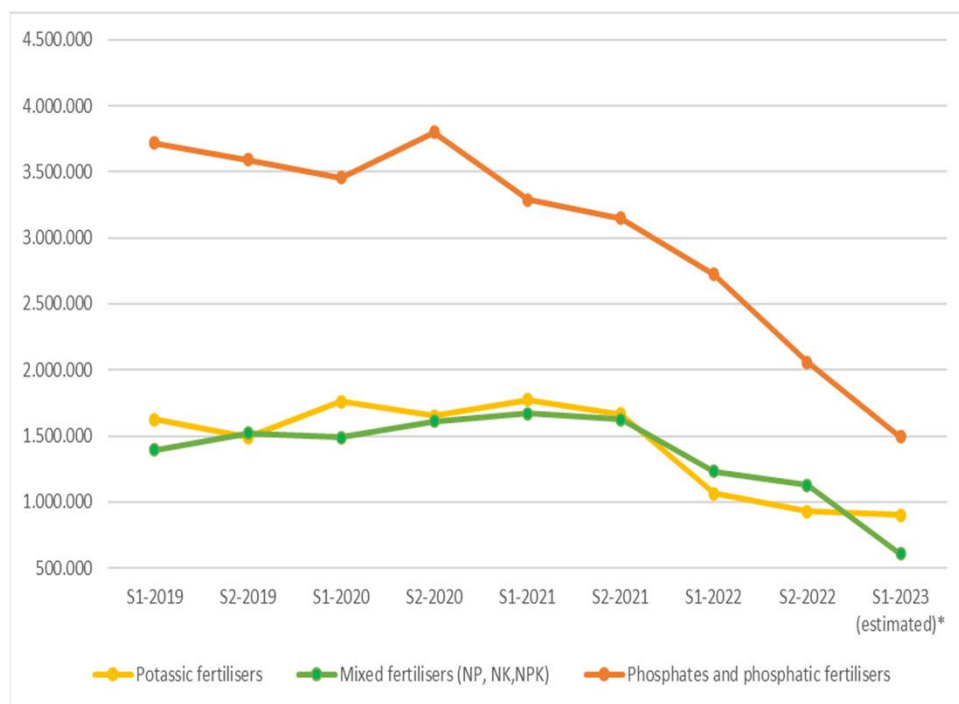
2022



2023

Imports of P,K and mixed fertilisers

EU imports (tonnes)

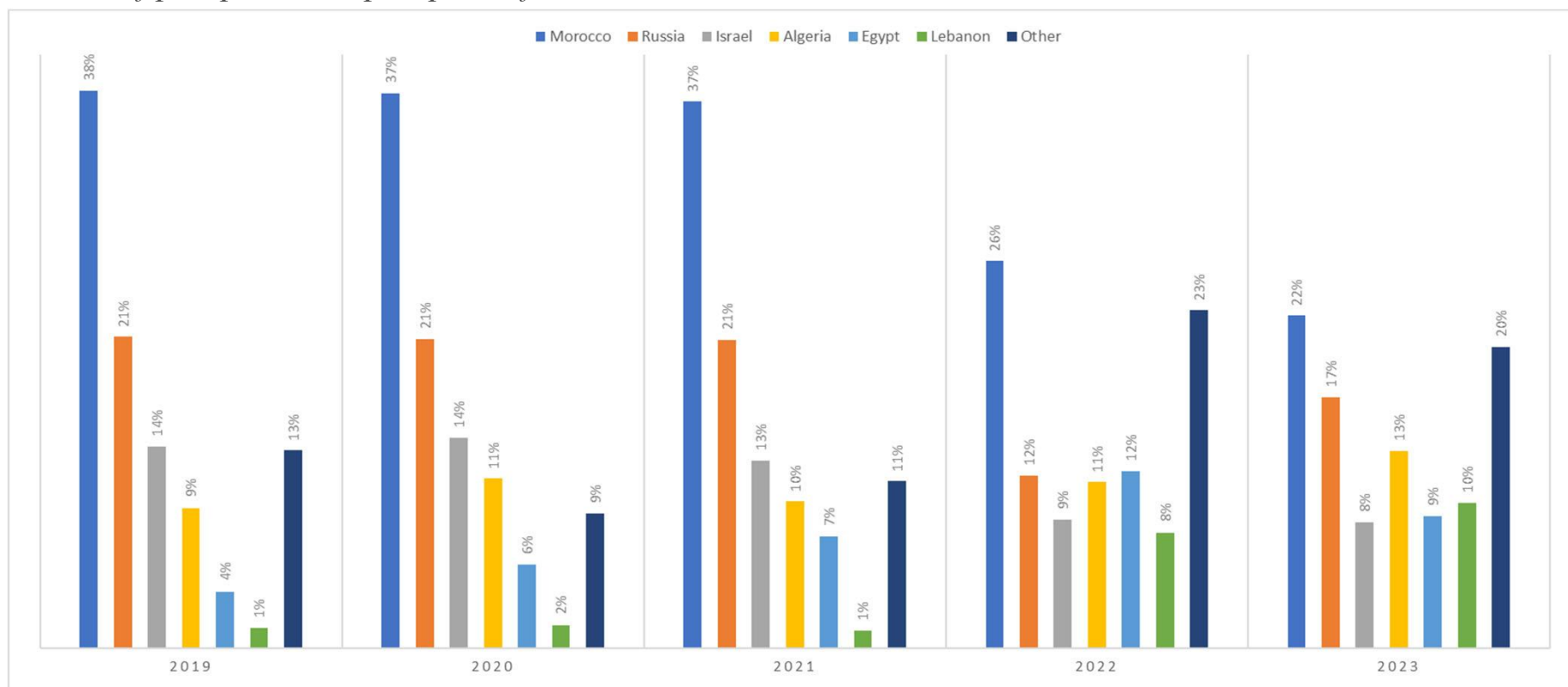


* data available until April 2023

Source: Eurostat – Comext, elaborated by DG AGRI

P,K and NPK fertiliser Imports top partners

Share of phosphate and phosphatic fertilisers

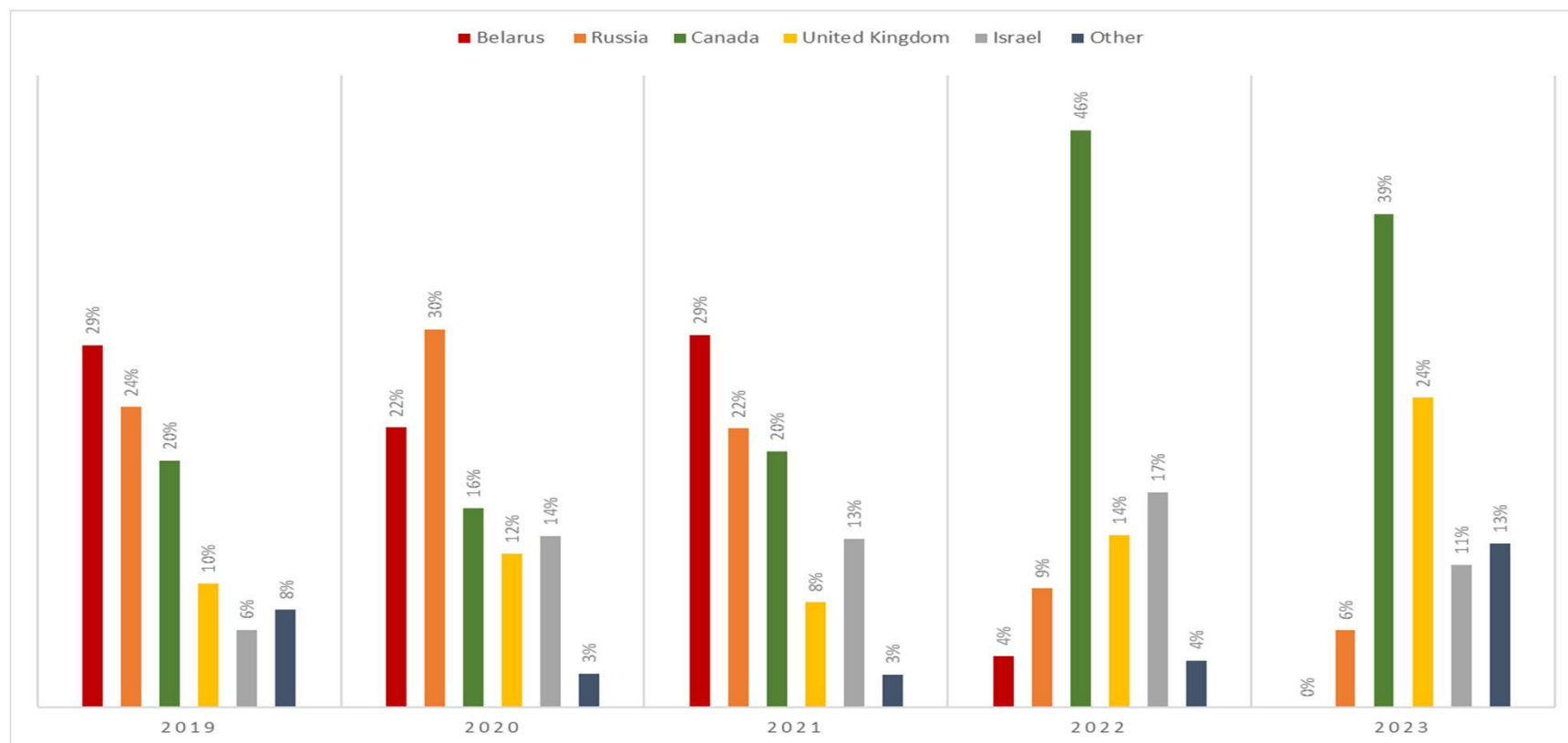


* data available until April 2023

Source: Eurostat – Comext, elaborated by DG AGRI

P,K and NPK fertiliser Imports top partners

Share of potassic fertilisers

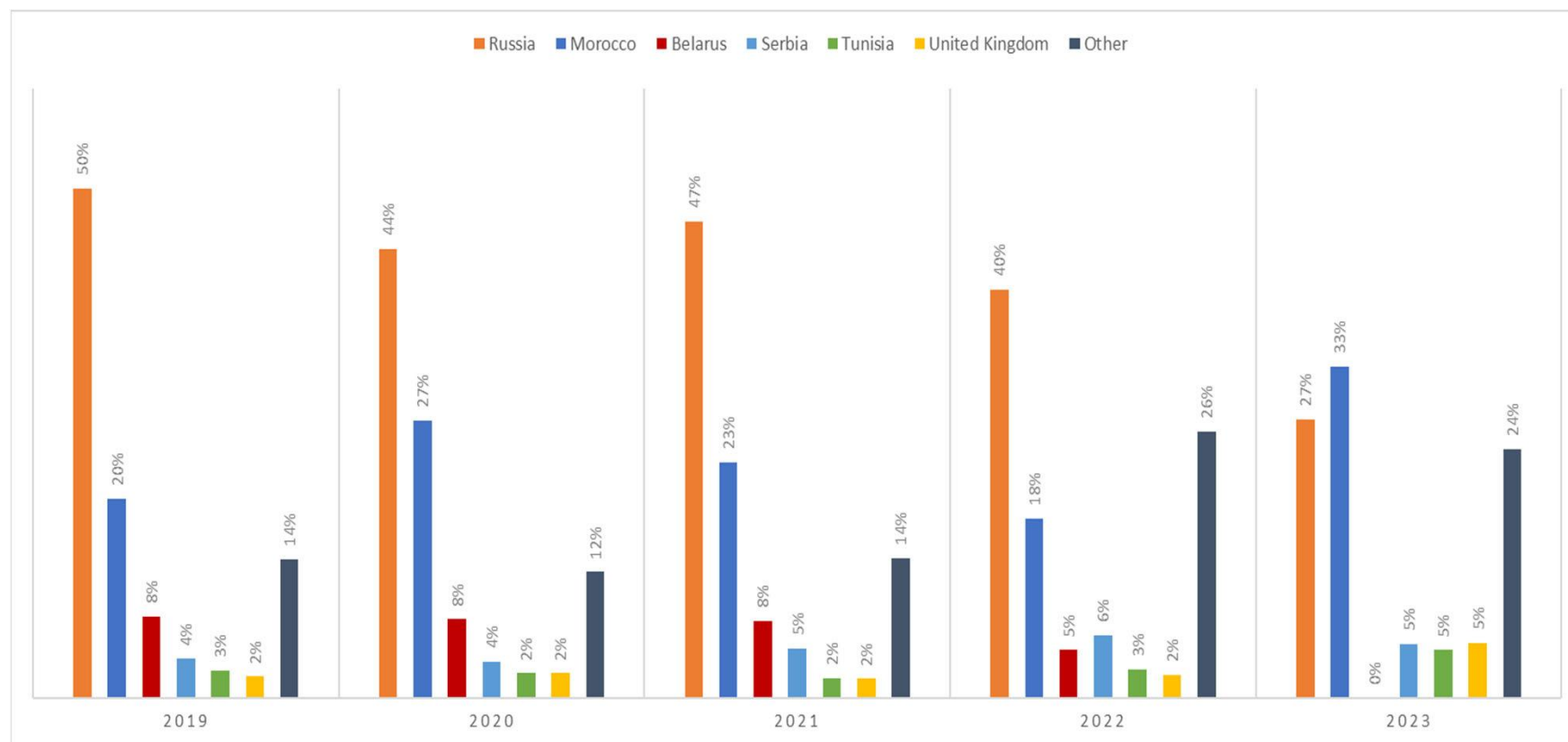


* data available until April 2023

Source: Eurostat – Comext, elaborated by DG AGRI

P,K and NPK fertiliser Imports top partners

Share of NPK fertilisers

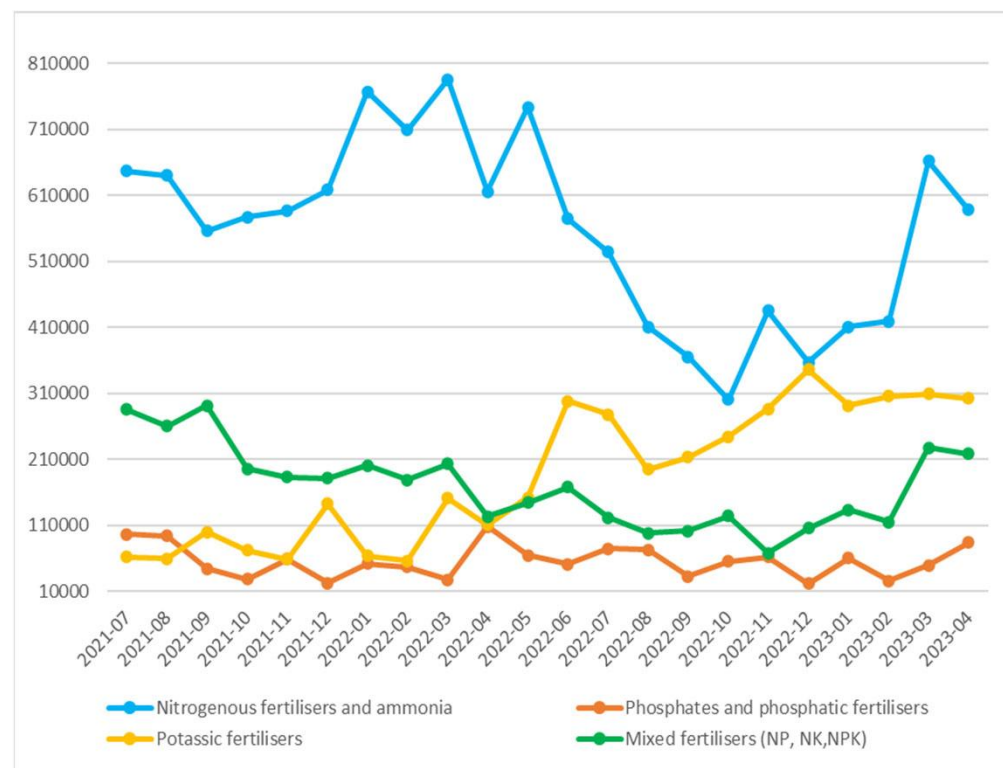
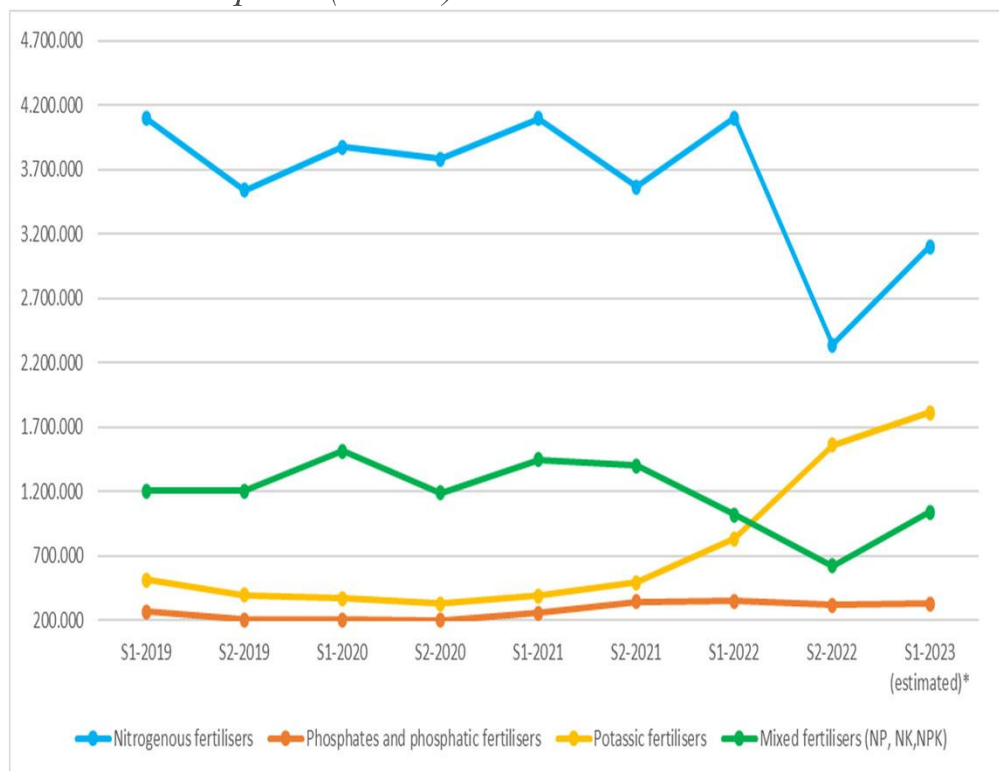


* data available until April 2023

Source: Eurostat – Comext, elaborated by DG AGRI

Exports of fertilisers

EU exports (tonnes)



* data available until April 2023

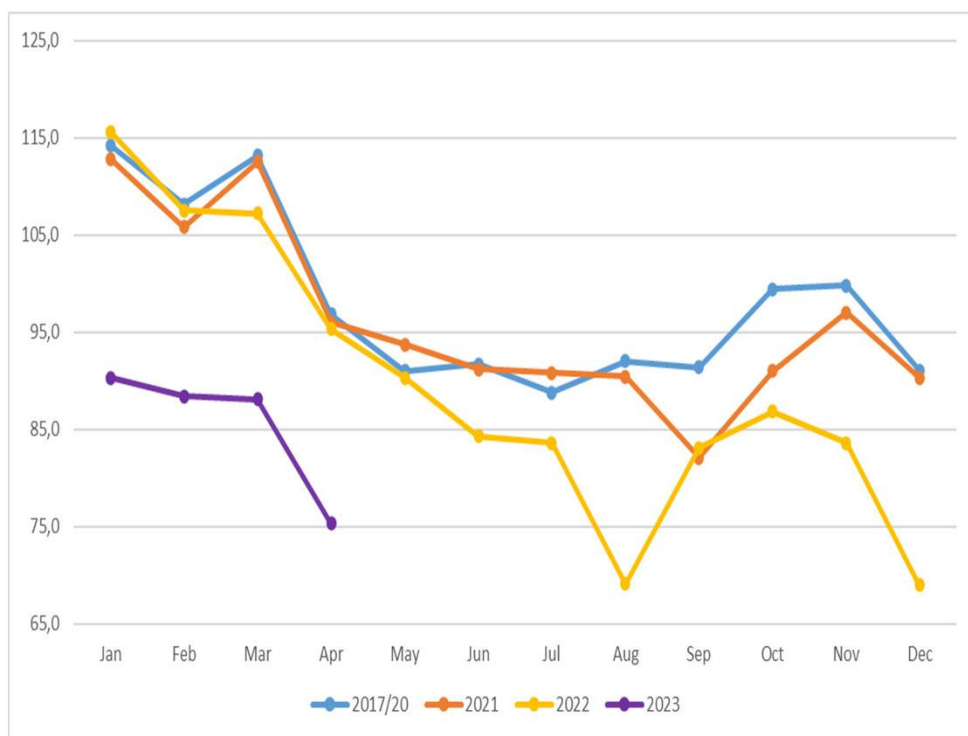
Source: Eurostat – Comext, elaborated by DG AGRI

Trade: Questions and comments

- How do you see trends in imports and exports evolves in the next months?
 - In term of quantities and balance of trade
- Which is the main factor for resuming/increasing exports of products, high stocks or reduced demand?
- Do you see any specific fertilisers products requiring a closer look?
- Any other questions?

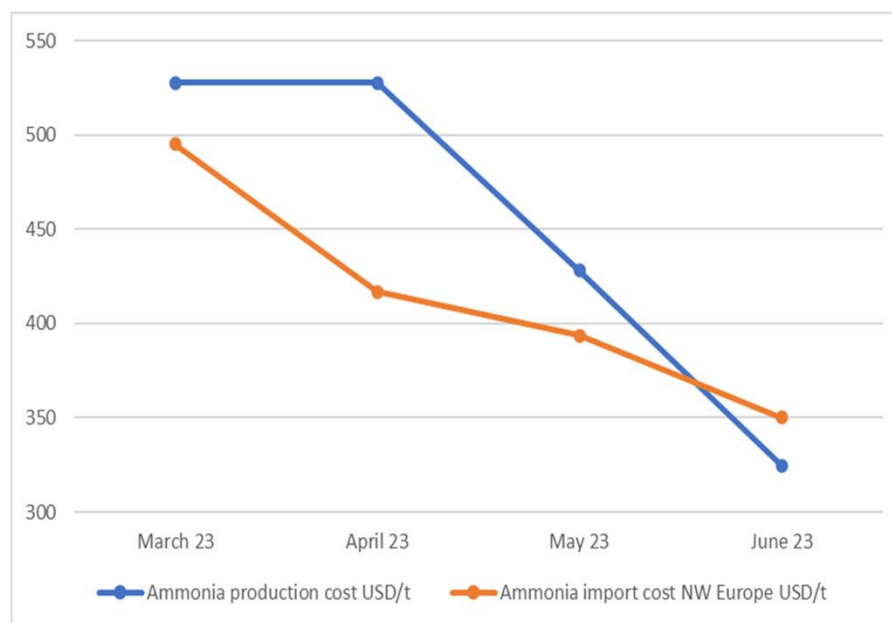
Production

Monthly index of production in volume of fertilisers and nitrogen compounds (EU-19)



Source: Eurostat, short-term business statistics

Ammonia production and import prices in EU (USD/t)

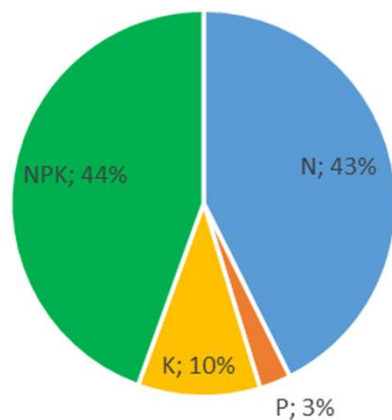


Source: Argus Media, elaborated by DG AGRI

Production

Fertiliser Production in EU	2019	2020	2021	Average 2019-2021
Nitrogenous (1000t of N)	16.079	17.417	17.974	17.157
Phosphatic (1000t of P ₂ O ₅)	982	1.015	1.182	1.060
Potassic (1000t of K ₂ O)	6.248	3.911	2.210	4.123
Mixed fertilisers (1000t of finished products)	17.033	16.231	20.430	17.898
Total Production	40.342	38.574	41.796	40.237

Share on average 2019-2021



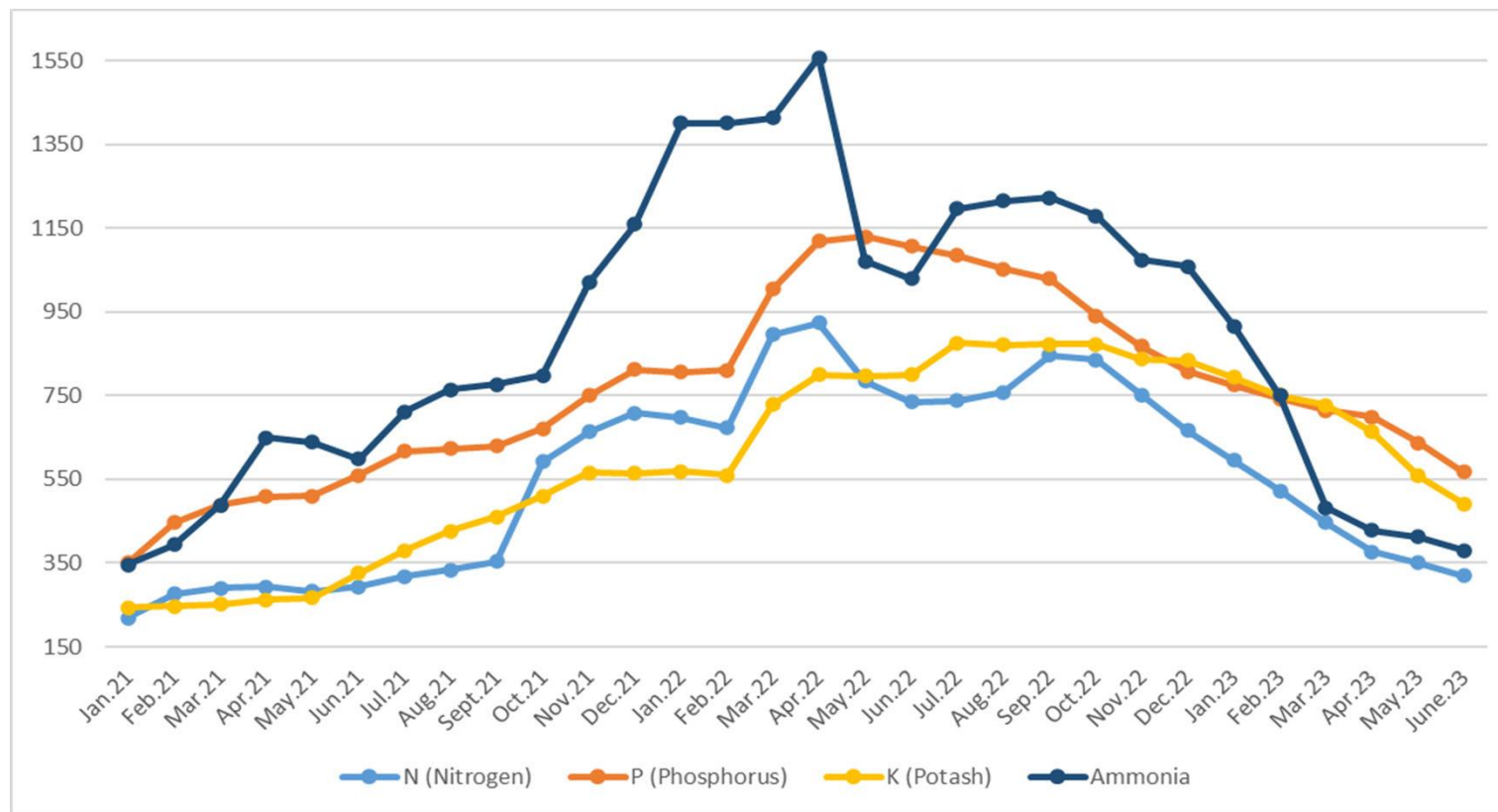
Source: Eurostat, Prodcorn

Production: Questions and comments

- Are the recent evolution of ammonia production costs expected to facilitate resuming of domestic production and reduce imports of nitrogenous fertilisers?
- We do not have yet detailed production data for 2022, do you have any comments or could you share any specific point?
- Any other questions?

Prices in EU markets

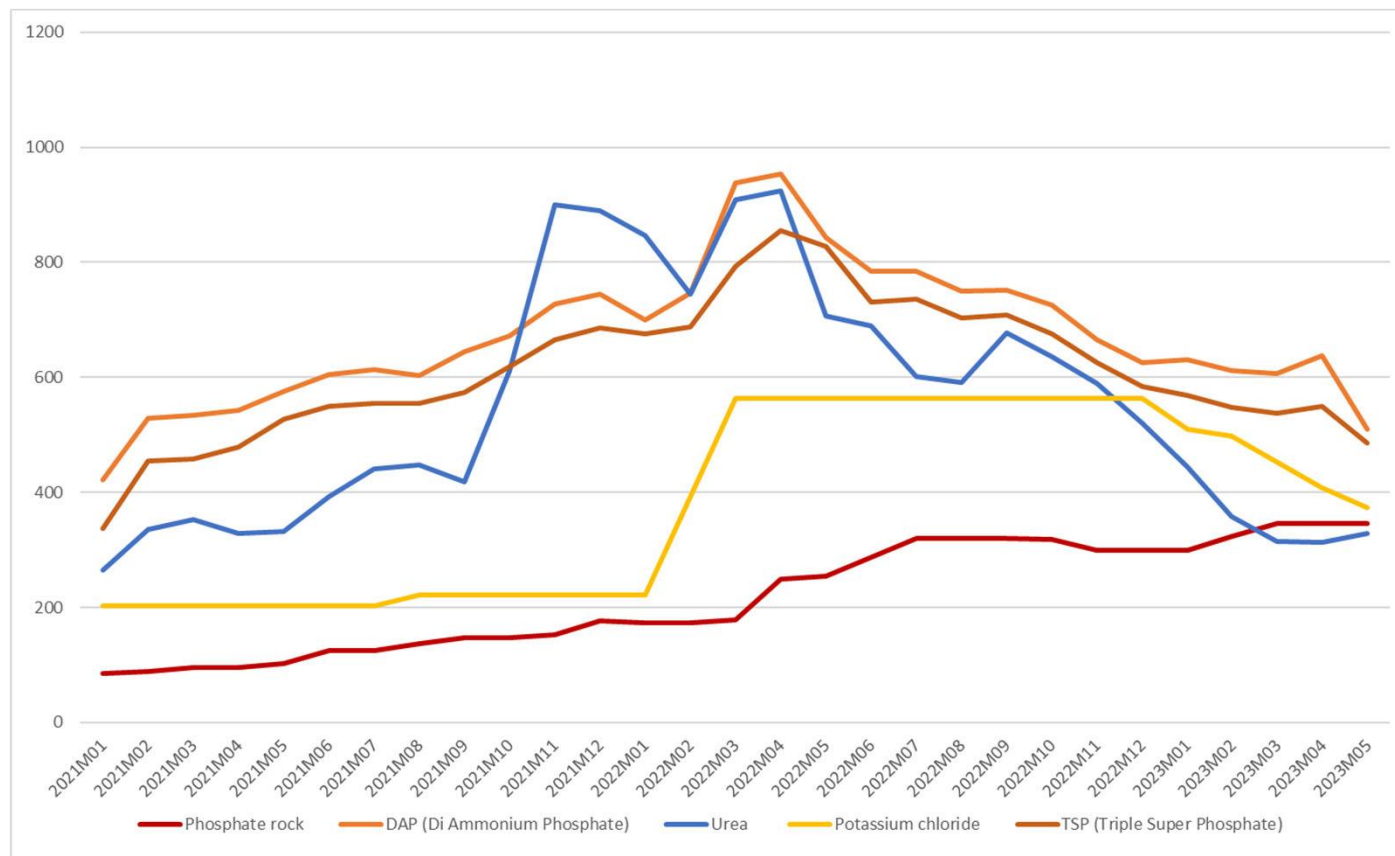
Monthly average ammonia and fertiliser prices by nutrient (€/Tonne)



Source: S&P Global elaborated by DG AGRI

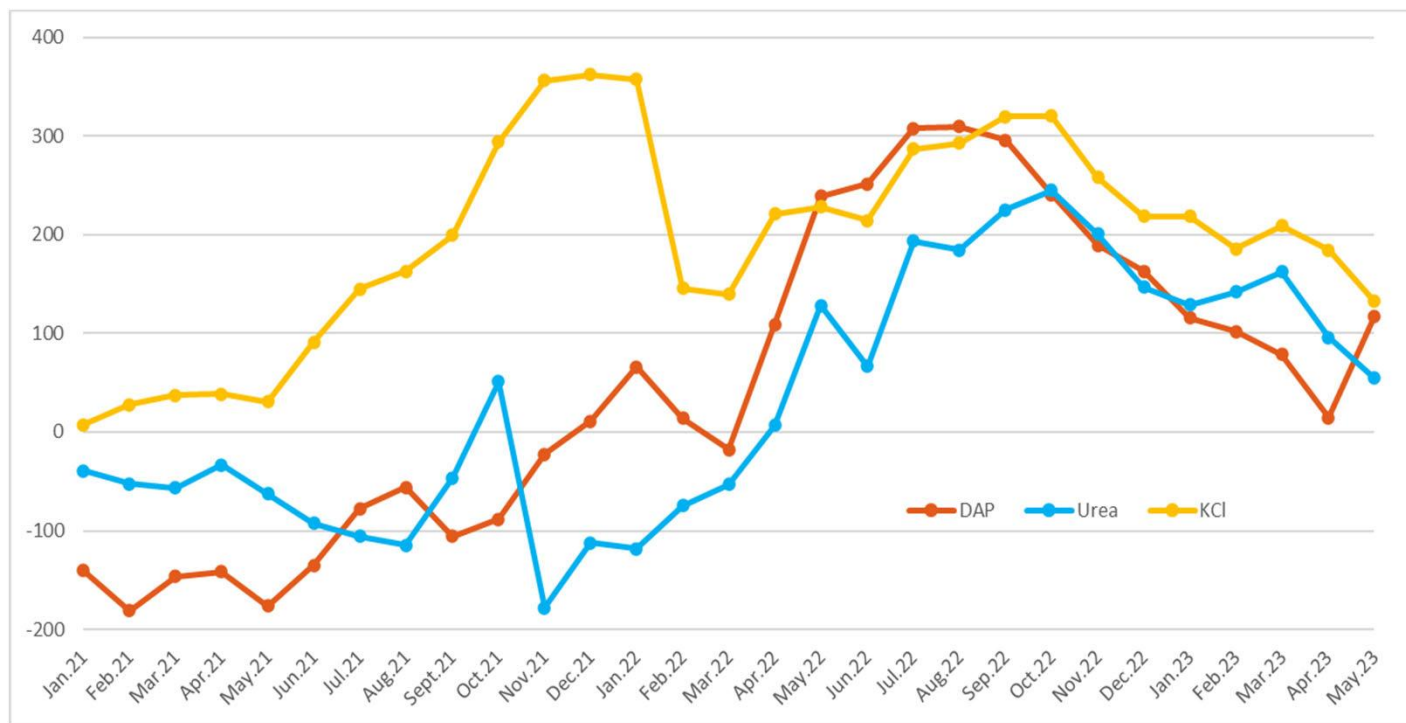
Fertiliser world prices

World Bank, USD/t



Fertiliser global prices

Indicative comparison of fertiliser prices in EU and world market – Prices difference €/t



Source: World Bank and S&P Global, elaborated by DG AGRI

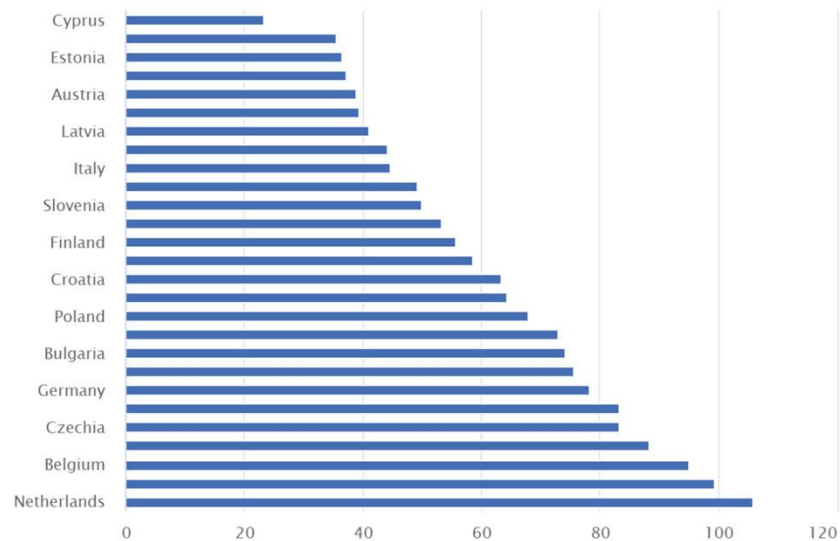
Prices: Questions and comments

- How do you see the fertiliser prices trends in the following months?
- Any other questions?

Consumption

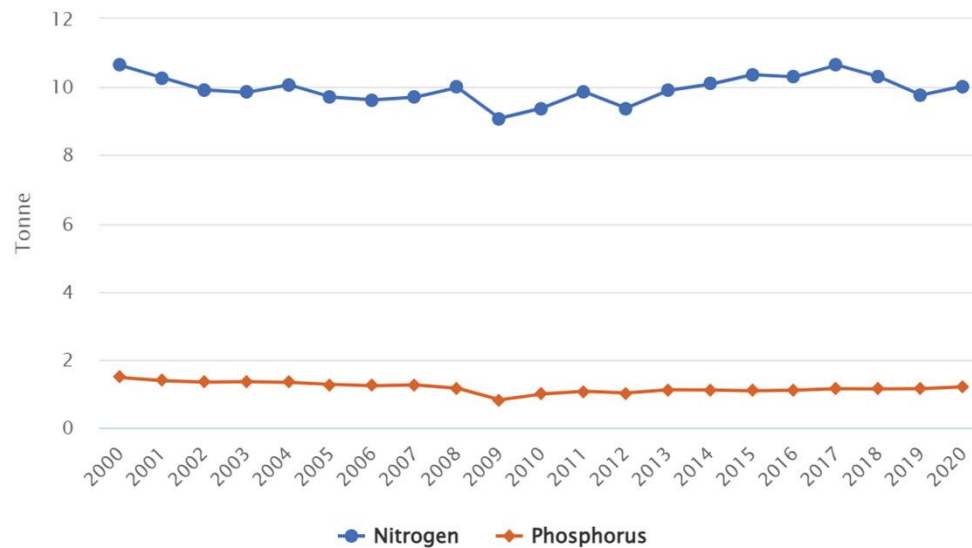
Average Nitrogen consumption (in nutrient) in the form of inorganic fertilisers in kilos per hectare of land used in agriculture (between 2018 and 2020)

Source: Eurostat, elaborated by the Directorate-General for Agriculture and Rural Development



Consumption of inorganic fertilisers in the EU

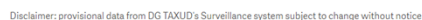
Source: Eurostat



Consumption: Questions and comments

- How do you assess more recent trend of fertilisers consumption?
 - Impact of CAP Strategic Plans
 - Green Deal (2030) target to reduce fertilisers use of 20%
 - Prices
- Any other questions?

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



European Commission Directorate-General for Agriculture and Rural Development

SELECT INDICATOR: **Shares of imports per origin**

Fertilisers Phosphorous fertilisers Member State Marking Year Month

Reset Selections Print to PDF 14/06/2023

EU import volume by Member State (quantity in tonnes)

Marking Year: 2019, 2020, 2021, 2022 | Month: all | Sector: Fertilisers | Product: Phosphorous fertiliser

Map Chart

Member State Area layer
tonnes
1.3
0

Atlantic Ocean

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1000 km

(Source: Eurostat (Comext))

EU import volume by Partner (quantity in tonnes)

Marking Year: 2019, 2020, 2021, 2022 | Month: all | Sector: Fertilisers | Product: Phosphorous fertiliser

Map Chart

Partner Area layer
tonnes
9.88
0

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1000 km

(Source: Eurostat (Comext))



Thank you