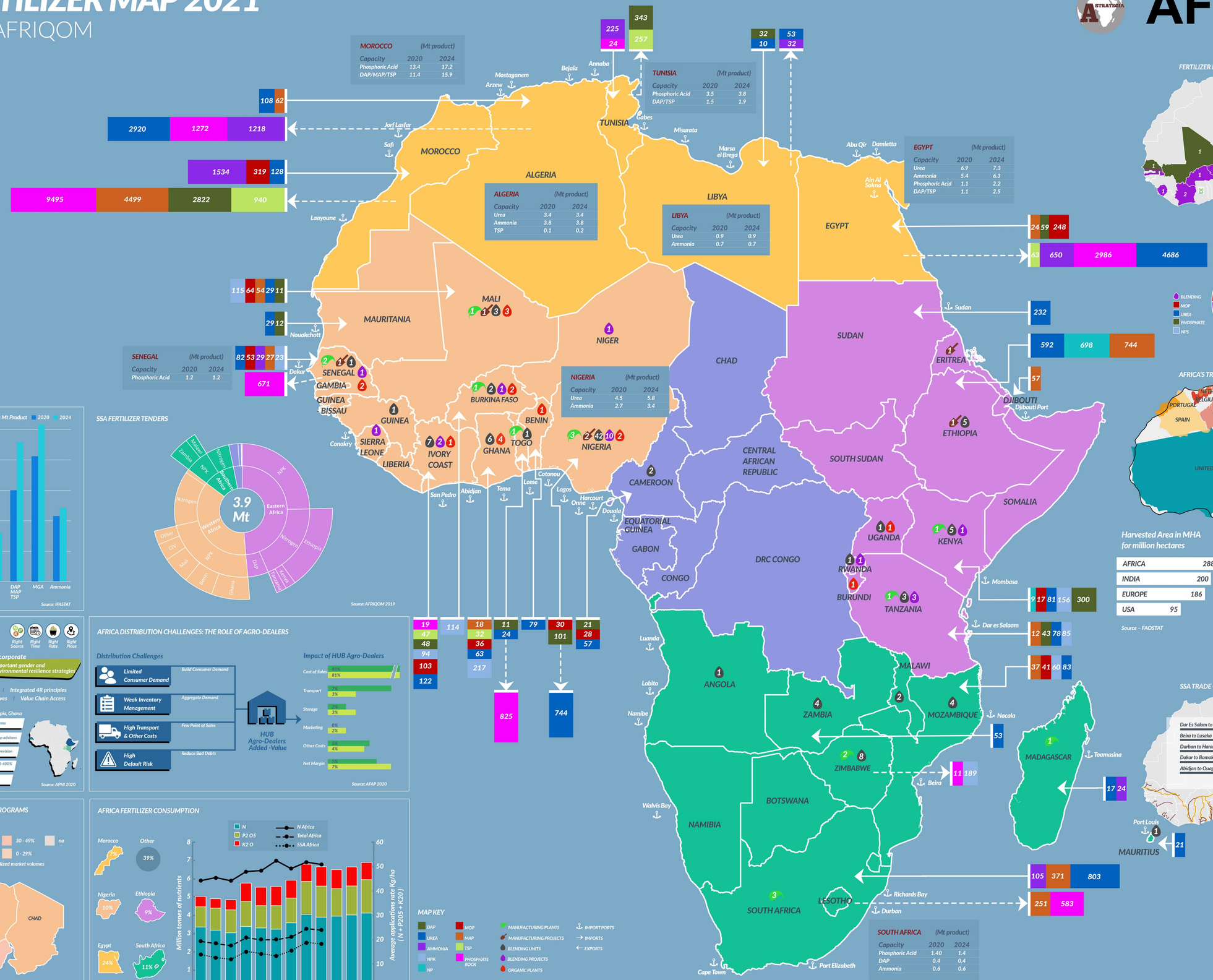
AFRICA FERTILIZER MAP 2021

by Astrategia and AFRIQOM

AFRIQOM

DIAMOND SPONSOR PLUS

OCP AFRICA



MOROCCO (Mt product)	2020	2024
Capacity		
Phosphoric Acid	13.4	17.2
DAP/MAP/TSP	11.4	15.9

TUNISIA (Mt product)	2020	2024
Capacity		
Phosphoric Acid	3.5	3.8
DAP/TSP	1.5	1.9

ALGERIA (Mt product)	2020	2024
Capacity		
Urea	3.4	3.4
Ammonia	3.8	3.8
TSP	0.1	0.2

LIBYA (Mt product)	2020	2024
Capacity		
Urea	0.9	0.9
Ammonia	0.7	0.7

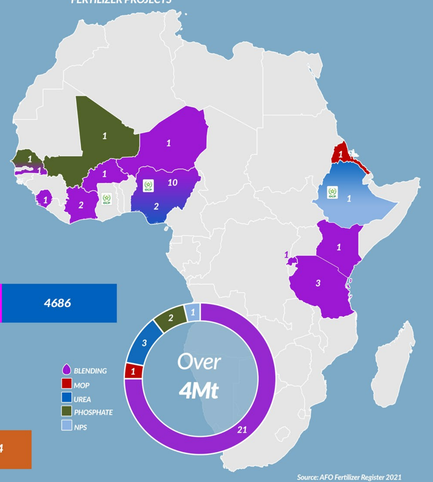
EGYPT (Mt product)	2020	2024
Capacity		
Urea	6.9	7.3
Ammonia	5.4	6.3
Phosphoric Acid	1.1	2.2
DAP/TSP	1.1	2.5

SENEGAL (Mt product)	2020	2024
Capacity		
Phosphoric Acid	1.2	1.2

NIGERIA (Mt product)	2020	2024
Capacity		
Urea	4.5	5.8
Ammonia	2.7	3.4

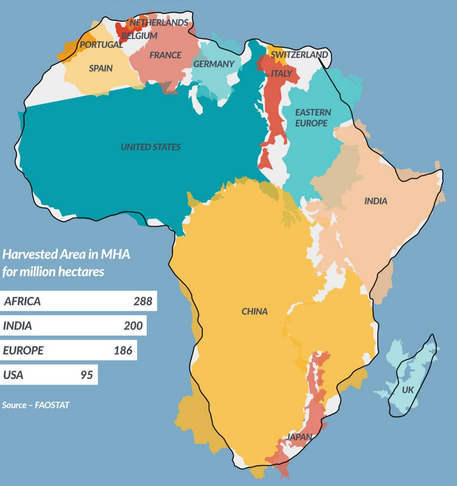
SOUTH AFRICA (Mt product)	2020	2024
Capacity		
Phosphoric Acid	1.40	1.4
DAP	0.4	0.4
Ammonia	0.6	0.6

FERTILIZER PROJECTS



Source: AFO Fertilizer Register 2021

AFRICA'S TRUE SIZE



Harvested Area in MHA for million hectares

AFRICA	288
INDIA	200
EUROPE	186
USA	95

Source – FAOSTAT

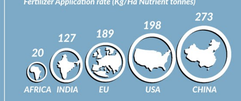
AFRICA KEY FACTS

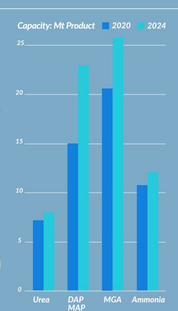
Fertile Land +50% — world unused fertile land located in Africa

Abundant Workforce +60% — Africa's population in Agri sector

Growing Population +25% — of world population will be in Africa by 2050

Fertilizer Application rate (Kg/Ha Nutrient tonnes)





Source: AFRIQOM research — Source: IFASTAT

SSA FERTILIZER TENDERS

Source: AFRIQOM 2019

108	62	225	343	32	53	24	59	248	
2920	1272	1218	24	257	10	32	63	650	2986	4686
1534	319	128							
9495	4499	2822	940						
115	64	54	29	11					
29	12								
82	53	29	27	23					
671									
232									
592	698	744							
57									
9	17	81	156	300					
12	43	78	85						
37	41	60	83						
53									
11	189								
17	24								
21									
105	371	803							
251	583								
19	47	48	94	103	122	114	18	32	36	63	217	825	11	24	79	30	101	744	21	28	57

4R SOLUTIONS PROJECT — www.4Rsolution.org

Right Source — Right Time — Right Rate — Right Place

Integrate: 4R nutrient stewardship

Improve: agricultural productivity and farm income

Incorporate: important gender and environmental resilience strategies

Enhanced Sustainable Production | Best Management Practices | Integrated 4R principles | Climate Smart | Women Empowerment | Farmers Cooperatives | Value Chain Access

4R IMPACT: Kenya, Ethiopia, Ghana

- Identification of crop production constraints
- Development of site-specific 4R-based recommendations
- Dissemination & scaling of 4R recommendations

- 250 field trials for smallholder farms
- Training of 5,000 farmers + 400 crop advisers
- National fertilizer recommendations revision
- Crop yields up 30-40% in fields and 200-400% in demonstration sites
- Senegal – Launch in 2021

Source: APNI 2020

AFRICA DISTRIBUTION CHALLENGES: THE ROLE OF AGRO-DEALERS

Distribution Challenges

- Limited Consumer Demand — Build Consumer Demand
- Weak Inventory Management — Aggregate Demand
- High Transport & Other Costs — Few Point of Sales
- High Default Risk — Reduce Bad Debts

HUB Agro-Dealers Added -Value

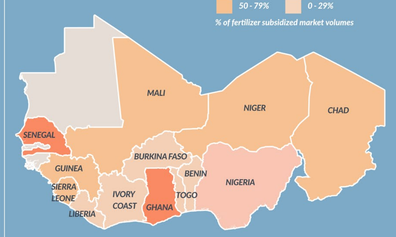
Impact of HUB Agro-Dealers

Source: AFAP 2020

WEST AFRICA SHARE OF FERTILIZER SUBSIDIES/PUBLIC PROGRAMS

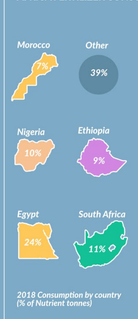
80% + | 50 - 79% | 30 - 49% | 0 - 29% | na

% of fertilizer subsidized market volumes

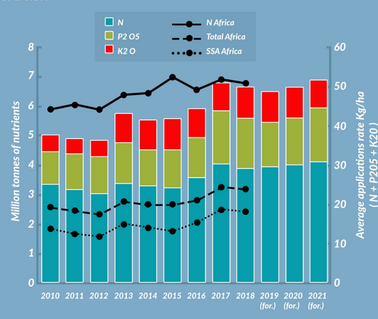


Source: IFDC 2020

AFRICA FERTILIZER CONSUMPTION



2018 Consumption by country (% of Nutrient tonnes)



Source: IFA November 2020

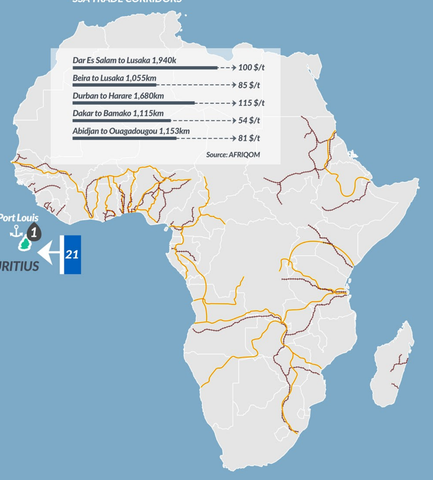
MAP KEY

DAP, UREA, AMMONIA, NPK, NP, MOP, MAP, TSP, PHOSPHATE ROCK, MANUFACTURING PLANTS, MANUFACTURING PROJECTS, BLENDING UNITS, BLENDING PROJECTS, ORGANIC PLANTS, IMPORT PORTS, IMPORTS, EXPORTS

Interactive map available at www.africafertilizermap.com

Product trade flows in '000 metric tonnes, MAP figures include NPs, cut off tonnage 10,000 tonnes, source: IFASTAT 2019
Sub-Sahara NPKs/NPs imports, cut off tonnage 10,000 tonnes, source: AFO 2019 data/AFRIQOM 2019 East Africa data
Sub-Sahara plants and projects, source: AFO/IFA 2020 data
North Africa capacities in million product tonnes, source IFASTAT: 2019

SSA TRADE CORRIDORS



SUPPORTING SPONSORS

AfricaFertilizer.org — IFASTAT