



The Mineral Fertilizer Market in MED-Amin countries

Mineral fertilizers are widely used to enhance crop growth, yield and quality, supplying key nutrients (primarily nitrogen, phosphorus and potassium) in addition to those naturally available in soils. Unlike organic fertilizers (such as compost or manure), mineral fertilizers are manufactured through chemical or industrial processes.

It is estimated that nearly half of the world's food production relies on mineral [fertilizers](#)¹. Their availability and price directly impact agricultural commodity prices and farmers' decision regarding their application quantities, in turn influencing fertilizer demand. This reliance of the global agrifood system on mineral fertilizers makes it necessary to closely monitor this highly strategic and concentrated market, which is particularly [vulnerable to supply shocks and logistical disruptions](#)². Fertilizer prices could therefore be subject to significant volatility, largely influenced by energy costs and geopolitical tensions.

Mineral fertilizers can be classified as either «*straight*» (containing a single nutrient) or «*compound*» (containing multiple nutrients).

This *Information note* focuses on primary nutrients (nitrogen - N, phosphorus - P and potassium - K) which account for the vast majority of fertilizer production, consumption, and trade volumes. For each nutrient, several fertilizer formulations exist. For the sake of synthesis, this document examines only the most widely used form that best reflects market trends (with the exception of **ammonia**):

- **Ammonia (82.2% nitrogen)** is mainly produced via the fossil fuel-intensive Haber-Bosch process. While seldom applied directly as fertilizer in the Mediterranean area, it is an essential intermediate for manu-

facturing other nitrogen-based fertilizers.

- **Urea (46% nitrogen)**, synthesized from ammonia, is the most widely used nitrogen fertilizer in agriculture. It is mainly applied as a «*straight*» fertilizer.

- **MAP/DAP (Mono and Di-ammonium Phosphate - 46-52% phosphoric acid)** are the main phosphate fertilizers. These «*compound*» fertilizers, also contain 10-18% nitrogen.

- **MOP (Muriate of Potash or Potassium Chloride - 60% Potassium Oxide)** is the primary form of potassium fertilizer.

For further details, refer to [AMIS Fertilizer series #1](#)³ (uses and composition) and [AMIS Fertilizer series #2](#)⁴ (production processes).

This document provides insights into the production, consumption, and trade of key mineral fertilizers in MED-Amin countries.

¹ Every month the [AMIS Market Monitor](#) provides an overview of global market developments.

I. Contrasted and diversified consumption patterns

Global consumption of mineral fertilizers has been increasing, both in total volume and per capita, although there are significant differences across countries. Fertilizer use varies according to the crops cultivated (maize, wheat, rice, and soybeans are associated with high fertilizer use), as well as GDP levels, the degree of agricultural intensification, and, to a lesser extent, fertilizer use efficiency and soil quality. Consequently, the world's leading agricultural producers (China, India, United States and Brazil) are also among the largest consumers of mineral fertilizers. However, due to environmental concerns and the introduction of integrated soil fertility management, since the late 1990s, overall consumption has declined in high-income countries.

Concentration of fertilizer consumption among leading agricultural producers

The same pattern can be observed for MED-Amin countries. The top agricultural producers are also the largest users of mineral fertilizers (Figure 1), with France and Türkiye leading the group, followed by Spain, Egypt, and, to a lesser extent, Italy. Together, these five countries account for 89% of total mineral fertilizer consumption in the MED-Amin area. Conversely, Albania, Lebanon and Malta are among the smaller users, partly due to more limited agricultural production, or other economic and financial constraints.

A limited share of global fertilizer consumption

MED-Amin countries account for a relatively small share of global mineral fertilizer consumption, consistent with their agricultural area and production: 6.3% for nitrogen, 4.8% for phosphorus and 3.4% for potassium (IFASTAT, 2019-2023 average). Average fertilizer agricultural use per area of cropland in MED-Amin countries

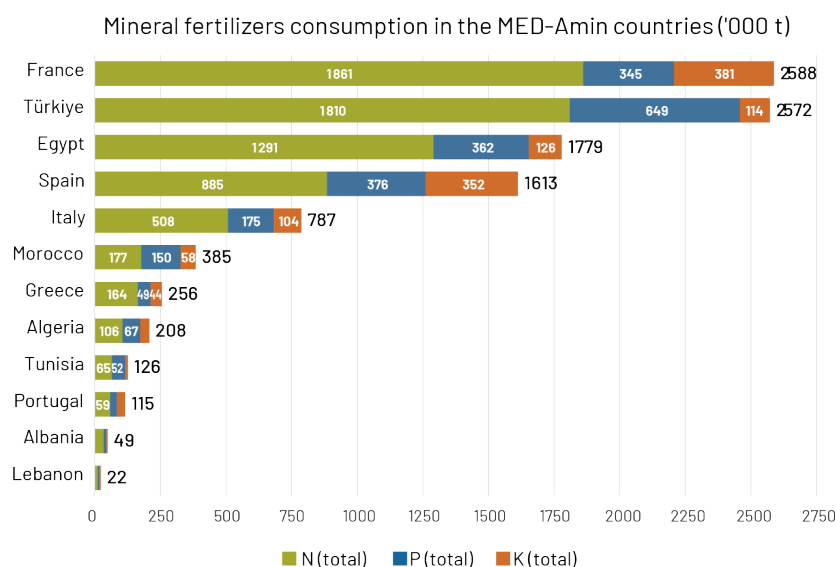


Figure 1: Mineral fertilizers consumption in MED-Amin countries (IFASTAT, 2019-2023 average).
*Algeria consumption is probably underestimated, some figures indicating for example an annual urea consumption of 150-200 000 tons.

amount to 107 kg/ha, slightly below the global average of 118 kg/ha (FAOSTAT, 2019-2023 average), although disparities among countries are significant.

Contrasting consumption dynamics by country

Three distinct groups of countries stand out in terms of consumption trends:

- Egypt shows markedly high consumption levels, especially for nitrogen fertilizers (ranked first worldwide in use per area of cropland). This is underpinned by broad domestic availability linked to the country's natural gas availabilities, as well as by government policies supporting fertilizer use to maintain or increase productivity.
- Most MED-Amin countries have fertilizer consumption levels close to, and often below, the global average. In the EU, following a peak in the late 1980s and early 1990s, fertilizer use tends to decline and stabilize, partly thanks to improved soil fertility management. In Türkiye, fertilizer consumption is slightly increasing, driven by

improved accessibility and the expansion of cash crops (e.g. tea). In Lebanon, fertilizer consumption has been falling for several years, constrained by successive economic crises and the destruction of the port of Beirut in 2020.

- Morocco and Tunisia show relatively low fertilizer consumption levels.

- Albania is experiencing an increase since the 2000s, after a sharp fall in the 90s, especially for compound fertilizers. It should also be noted that fertilizer use is subject to significant annual fluctuations.

Greater diversity in fertilizer forms used

MED-Amin countries apply a more diverse range of fertilizer types than the global average. Urea accounts for 35% of total nitrogen consumption (50% globally), **MAP/DAP** for 30% of phosphorus (50% globally) and **MOP** for 35% of potassium (57% globally). The types of fertilizers applied can vary significantly year to year, mainly depending on market prices: for instance, **urea**

may replace nitrates when the latter become too expensive.

Nitrogen is mainly used in «straight» form, phosphorus in «compound» form, and potassium in both «straight» and «compound» forms, particularly in NPK blends. NPK is widely used in Greece, Portugal, Albania, Lebanon and Türkiye, especially for cash crops (tobacco, tea, flowers) and for fruit and vegetable production, as its customizable blends better meet crop requirements. Conversely, and precisely because other forms are preferred, **urea** is scarcely or not at all applied in Tunisia and Portugal; **MAP/DAP** is less used in Greece, Egypt and Portugal; and **MOP** is limited in Türkiye, Egypt, Lebanon and Albania.

Other fertilizer types are also used in significant proportions:

- **Nitrogen:** ammonium nitrate (Morocco, Tunisia, France), calcium ammonium nitrate (Portugal, Spain), ammonium nitrate solution (France) and ammonium sulphate (Lebanon). Nitrates, which are more stable than **urea** (less prone to volatilization³ and leaching⁴), are generally preferred within the EU. Ammonium sulphate, on the other

Mineral fertilizers consumption per area of cropland in MED-Amin countries

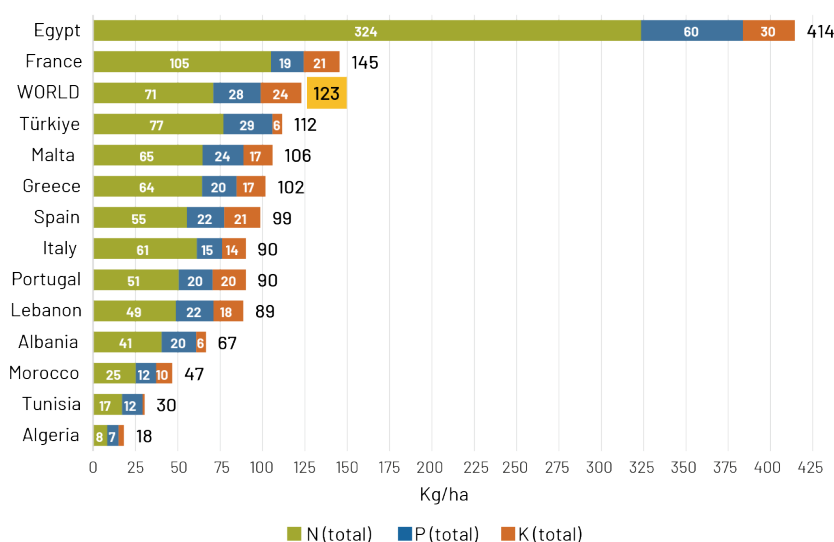


Figure 2: Mineral fertilizer consumption per hectare of cropland in MED-Amin countries and comparison to the global average (FAOSTAT, 2019–2023 average). Figures in black represent the total of the three elements. *Algeria consumption is probably underestimated. Other source indicates a [37 kg/ha](#) consumption⁵.

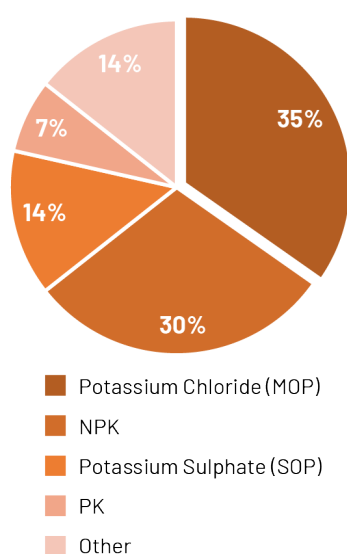
hand, is relatively cheap and often an industrial by-product.

- **Phosphorus:** Triple Superphosphate (Morocco, France) and Simple Superphosphate (Egypt). These straight forms, which do not contain **ammonia**, are less expensive.

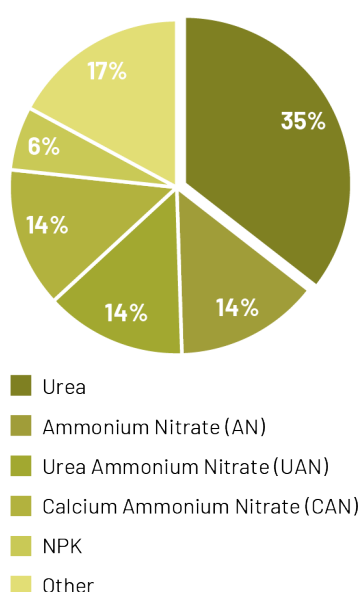
- **Potassium:** Potassium Sulphate (Egypt, Algeria).

In addition, controlled-release and low-carbon fertilizers (such as calcium ammonium nitrate manufactured with green ammonia) are gaining market share in the EU, [attracting increasing investment in production from private companies](#)⁶.

Share of different fertilizers in total K consumption



Share of different fertilizers in total N consumption



Share of different fertilizers in total phosphorus consumption

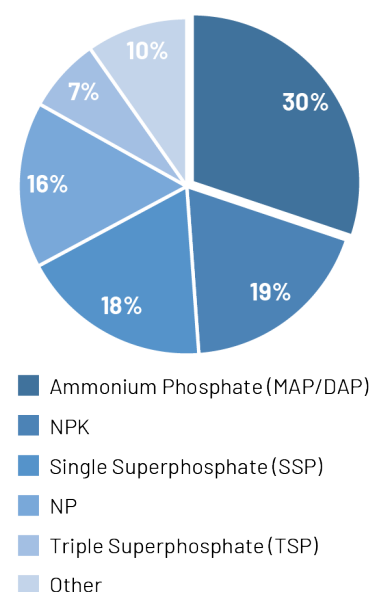


Figure 3: Share of each fertilizer type in total nitrogen, phosphorus and potassium consumption (IFA, 2019–2023 average).

² Limited reliable information is available about Algeria.

II. Significant nitrogen and phosphorus production

Global mineral fertilizer production is highly concentrated. Average global annual output over the 2020-2024 period stands at 188.0 Mt for **urea**, 63.0 Mt for **MAP/DAP** and 69.2 Mt for **MOP**. The production of nitrogen fertilizers, which is highly energy-intensive, is concentrated in countries with abundant natural gas or coal resources: China, India, Russia, and the United States together account for more than half of global output. Phosphate and potassium production is even more concentrated, as it relies on mineral deposits found in a limited number of countries. Production is dominated by a few major players: around $\frac{3}{4}$ of the **MAP/DAP** originates from China, Morocco, United States and Russia, while almost 80% of the **MOP** comes from Canada, Russia, Belarus and China.

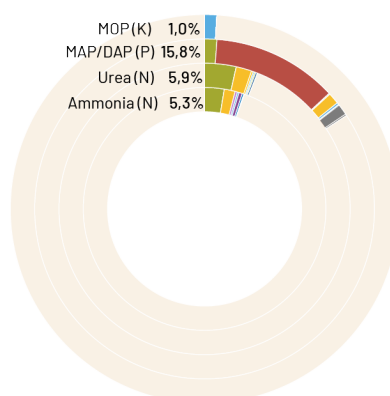
Production concentrated in Egypt, Morocco and Algeria

At regional level, MED-Amin countries produce more mineral fertilizers than they consume, except for the **MOP** due to the absence of significant potash deposits. Nitrogen fertilizer production, while significant, represents a small share of global output (Figure 4).

Three main producing countries stand out:

- Egypt and Algeria are by far the two largest nitrogen fertilizer

Share of MED-Amin countries in global fertilizers production



Med-Amin average yearly fertilizer production (2020-2024)

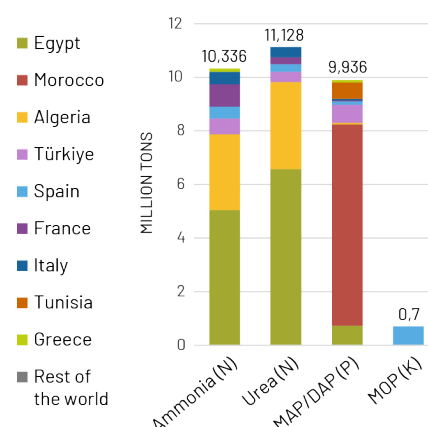


Figure 4: Mineral fertilizer production in MED-Amin countries (FAOSTAT, IFA and S&P Platts; 2020-2024 average). ROW stands for «Rest of the World».

producers in the region, thanks to their domestic gas supply. Several other countries also produce significant quantities.

- Morocco is the world's second-largest producer of **MAP/DAP** (12% of global output, behind China with almost 50%), leveraging its substantial phosphate reserves. The production is primarily intended for export. Tunisia, Türkiye and Egypt are also minor producers.

Governments and public sector are strongly involved in fertilizers production in these countries (for further details, please refer to [Focus on domestic market & policies](#)). Spain is the only signifi-

cant producer of **MOP** in the region, and only in small quantities (the country primarily produces SOP - Sulphate of Potash).

Continued dependence on intra- and extra-MED-Amin imports

With few exceptions for some nutrients, MED-Amin countries remain highly dependent on imports to meet their mineral fertilizer needs. While the region as a whole is a net exporter of nitrogen and phosphorus, it remains heavily reliant on external imports for potassium.



³ Volatilization is the loss of applied nitrogen to the atmosphere as ammonia gas.

⁴ Leaching is the loss of water-soluble plant nutrients from the soil, due to rain and irrigation.

North Africa's phosphate reserves and expanding production capacity

North African countries hold considerable phosphate reserves, the largest in the world⁷, and are among the largest producers.

Country	Production (Mt)	Reserves (estimated)	
		Resources (Mt)	Rank (World)
Morocco	35.5	50 000	1
Algeria	1.6	2 200	5
Tunisia	3.4	2 500	4
Egypt	5.0	2 800	3

Table 1: Estimated phosphate rock production (2020-2024 average) and reserves of north African MED-Amin countries according to USGS (U.S. Geological Survey)^{8,9,10}.

Morocco's estimated reserves account for approximately 70% of global reserves, and the country produces 30-40 Mt of phosphate rock annually (up to 47.5 Mt). In Algeria, production has been increasing in recent years, reaching 2 Mt in 2024¹¹, mostly for export, with limited phosphate fertilizers production (mainly Single Superphosphate and TSP - Triple Superphosphate). However, numerous projects and investments are currently underway in North African countries (including Tunisia and Egypt) in mining and processing to expand phosphate rock and phosphate fertilizer production capacity. For further details, please refer to [Focus on domestic market & policies](#).



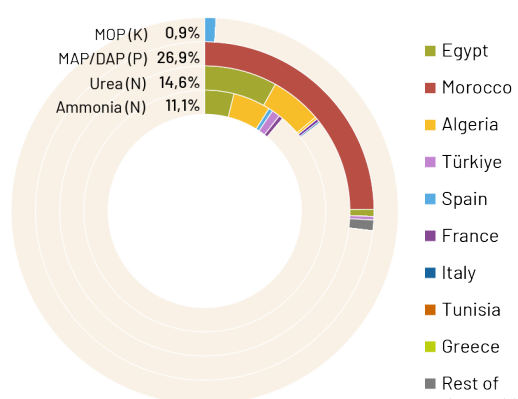
III. Significant participation to global trade

North African countries are major suppliers of nitrogen and phosphate fertilizers

MED-Amin countries export an average of 18.5 Mt of mineral fertilizers, primarily phosphorus and nitrogen (*Global Trade Tracker, 2020-2024 average*), in line with production (*Figure 5*).

Egypt and Algeria account for 80% of ammonia exports and 95% of urea exports within the MED-Amin area. Morocco alone accounts for 92% of **DAP/MAP** exports. Tunisia is also a small exporter. These countries account for a significant share of global exports, notably 27% of worldwide **MAP/DAP** exports, well above their weight in global **MAP/DAP** production. This is due to relatively low domestic consumption compared with production volumes, unlike other

Share of MED-Amin countries in global fertilizers exports



Med-Amin average yearly fertilizer exports (2020-2024)

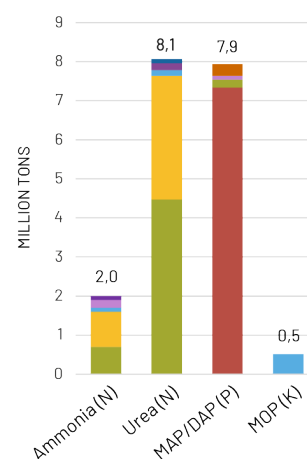


Figure 5: Mineral fertilizer exports from MED-Amin countries (*Global Trade Tracker; 2020-2024 average*). ROW stands for «Rest of the World»

major producers that are also large consumers (China, US, Russia), and because «premium» production is sometimes reserved for export.

Spain is the only regional exporter of **MOP**, but at a very low level compared to globally traded volumes.

Largely globalised flows and a segmented market

Egypt predominantly exports its **urea** to Europe, with half of its exports destined for other MED-Amin countries (notably Western Europe and Türkiye). Meanwhile, Algeria mainly exports to South and North America and Europe, with only 21% of its **urea** exports directed to the MED-Amin region. These differences are explained by preferential customs tariffs, but also logistical capacities: Egypt charts smaller vessels adapted to European demand, while Algeria opts for larger shipments (30 000 to 45 000 t) suited to transatlantic trade.

For **ammonia**, exports predominantly go to MED-Amin countries (51% for Egypt, 40% for Algeria), notably to countries with a fertilizer industry.

Regarding Moroccan phosphates, two markets stand out according to importer preferences:

- **MAP** is primarily destined to South and North America (Brazil, Argentina, United-States, Canada), as well as to Australia.
 - **DAP** destinations are more diversified with key importers including south Asian (India, Pakistan, Bangladesh) and European countries, as well as Türkiye, Mexico and Nigeria, among others. Approximately 18% of Moroccan **DAP** exports are destined for MED-Amin countries.
- Finally, 21% of Spanish **MOP** exports are directed to neighbouring countries: Morocco, France and Portugal.

A strong dependence on imports among the main consuming countries

MED-Amin countries import a total of 14.3 Mt of mineral fertilizers (*Global Trade Tracker*, 2020-2024 average), which is 4.2 Mt below total exports at regional level. However, imports from outside the MED-Amin region are essential.

Except for producing countries like Egypt, which largely cover their domestic needs, the main consumers are also the main importers. Türkiye, France, Italy and Spain account for 95% of the MED-Amin's **urea** imports (over the 2022-2025 period). This concen-

tration is even more pronounced for **DAP**, with these four countries accounting for 98% of imported volumes while **MAP** imports are more evenly distributed among countries. **MOP** imports are also more distributed, with Egypt and Morocco among the main importers.

Regarding **Ammonia**, Morocco is by far the largest importer (1.8 Mt), ahead of Türkiye, as it is mainly locally reprocessed, notably for the downstream production of **MAP/DAP**.

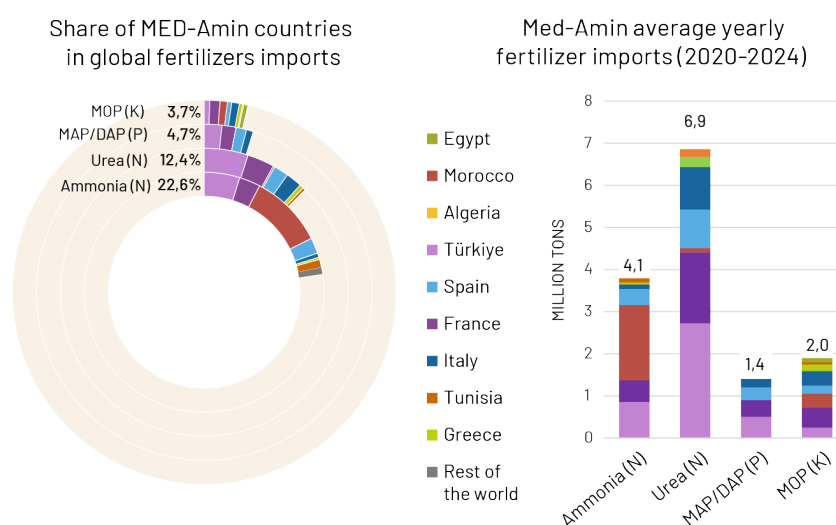


Figure 6: Mineral fertilizers imports from MED-Amin countries (*Global Trade Tracker*; 2020-2024 average). ROW stands for «Rest of the World».

While trade among MED-Amin countries is significant, dependence on external sources remains high

The following charts (*Figure 7*) show the main origins of imports to the MED-Amin countries, distinguishing between intra-MED-Amin flows and those coming from the rest of the world (ROW). Figures correspond to the volumes imported in thousands of tons.

Regarding nitrogen fertilizers, MENA⁵ (Middle East and North Africa) countries (including Saudi Arabia, Algeria, Egypt, Iran, Libya, Qatar, Oman), which are among the world's leading exporters owing to their significant fossil energy resources, are key suppliers to MED-Amin countries, with approxi-

mately 0.7 Mt annually over the 2022-2024 period, half of total ammonia imports. Trinidad and Tobago, United States and Russia are other major suppliers for MED-Amin countries. Morocco, which holds long-term contracts with some of these countries, concentrates more than 45% of **ammonia** imports of MED-Amin area. However, Morocco does not import significant **ammonia** from Egypt or Algeria. Supplier choice is mainly driven by **ammonia prices**, which are closely linked to natural gas costs.

⁵Or WANA (West Asia and North Africa)

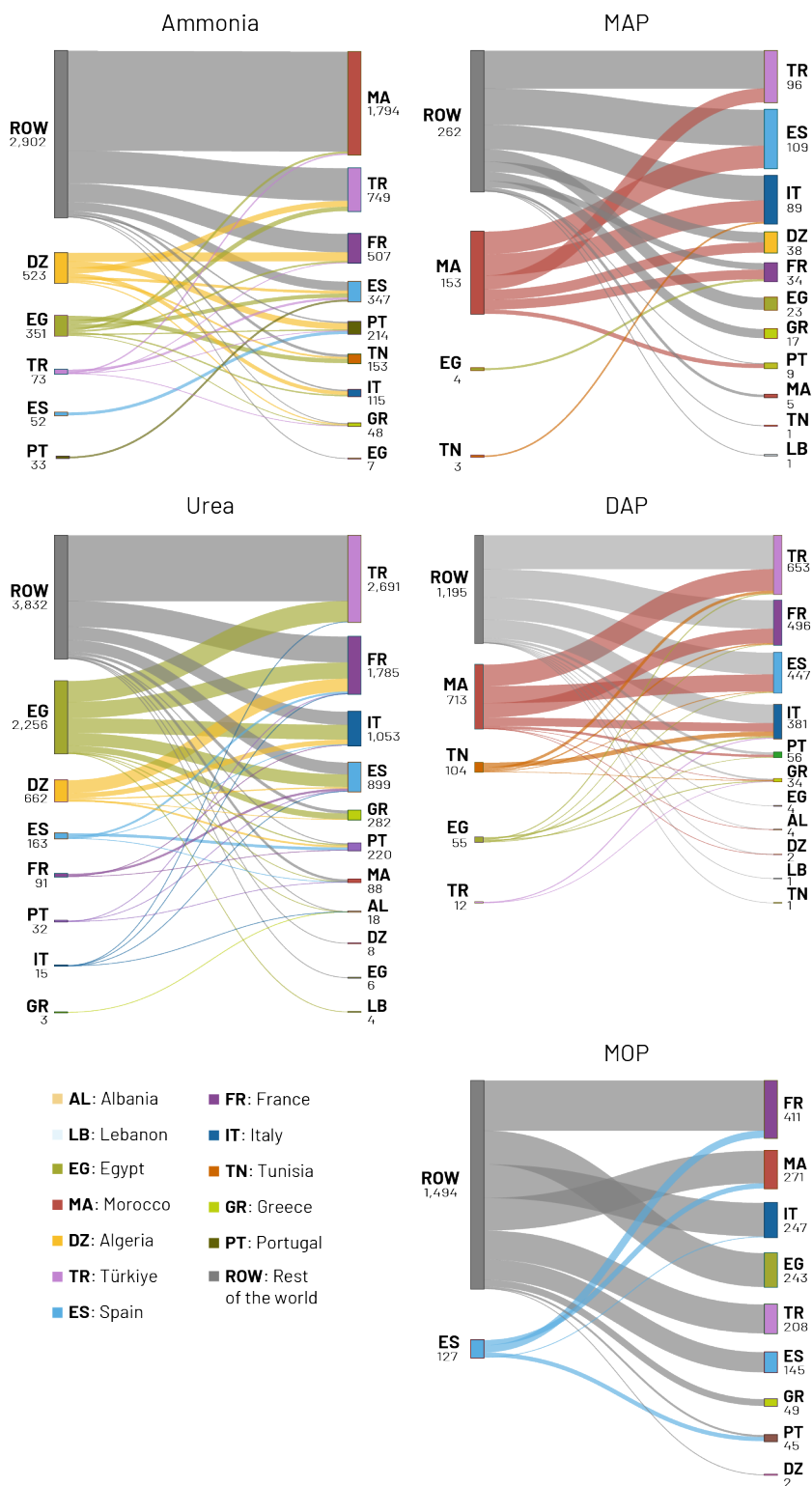


Figure 7: Origins of mineral fertilizer imports by MED-Amin countries (S&P Global, Global Trade Tracker, 2022-2024 average, 2022-2025 average for MAP and DAP).

For **urea**, supply sources are more diversified and more based on geographical proximity. Egypt remains the leading supplier for MED-Amin countries, followed by Iran (approximately 1.5 Mt), which exports almost exclusively to Türkiye. Algeria and Russia are also significant suppliers for most MED-Amin countries. To a lesser extent, France imports **urea** from other western Europe countries (Germany, Belgium, Netherland) and Türkiye from Turkmenistan.

MAP mainly originates from Morocco, Russia, and China, while **DAP** is mostly imported from Morocco (60%), followed at a much lower level by Russia, Tunisia, and Lithuania (mainly to France).

MOP imports mainly come from countries outside MED-Amin (92%). Origins are limited to major global producers: Jordan (mainly to Egypt), Germany (to European countries and Morocco), Canada (Morocco and Italy), Israel (to European countries and Türkiye), Russia and Belarus (Türkiye) and more marginally, Belgium (France). The choice of origins is primarily determined by prices and logistical costs.

Thus, intra-MED-Amin trade is significant but mostly flows from North African countries to Europe and Türkiye. Despite a regional surplus of nitrogen and phosphorus, a substantial share of imports still comes from outside the region due to availability, prices, geographic proximity, but also, to a lesser extent, the quality and product specifications needs, tariff or non-tariff barriers, and established commercial relationships.

IV. Volatile markets exposed to multiple risks

The mineral fertilizer market has experienced strong fluctuations in recent years. After a period of steady growth, global traded volumes declined in 2022 following the outbreak of the war in Ukraine. Since then, trade has been on the rise again: nitrogen, phosphorus, and especially potash volumes increased, driven by a renewed demand from major importers. In the coming years, overall demand is expected to remain stable or grow slightly, [with different prospects depending on the region](#)¹².

However, these forecasts should be taken with caution as highlighted by recent developments in early 2026 with the closure of the Strait of Hormuz.

Market concentration increases vulnerability to disruptions

The MED-Amin area remains highly dependent on international trade in mineral fertilizers, which is subject to significant price volatility and various risks. Production is concentrated, [both in a few countries but also among a small number of companies](#)², making the market more vulnerable to shocks

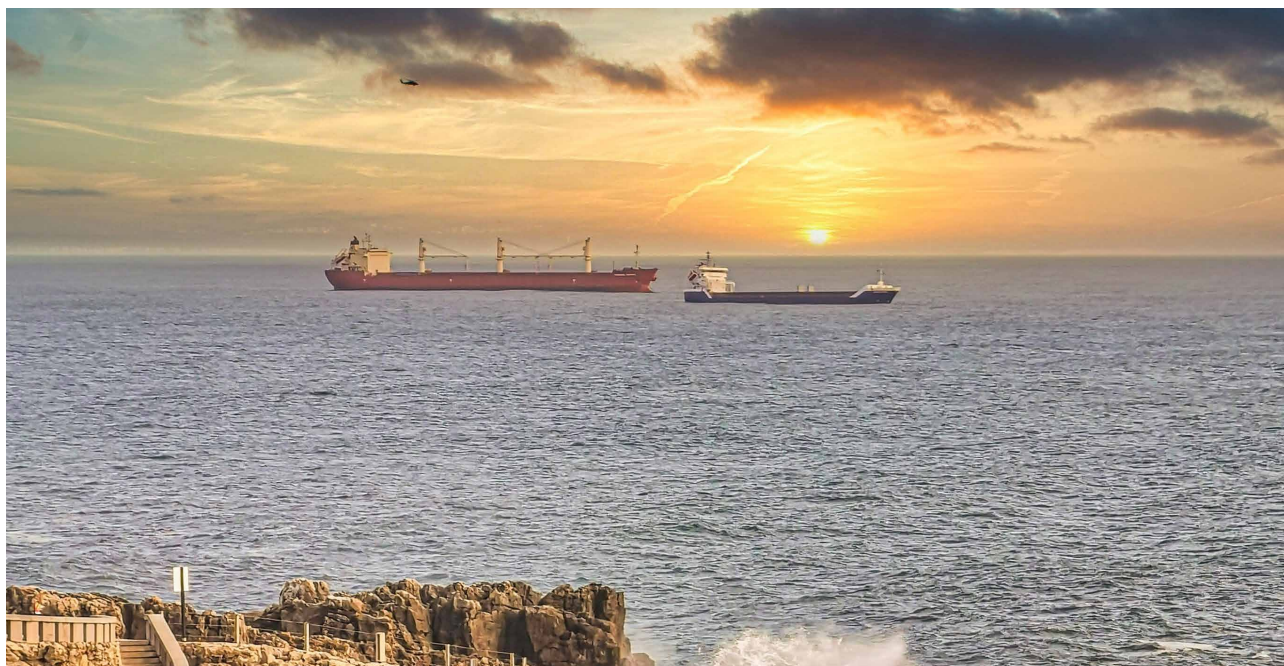
and logistical disruptions. Thus, many buyers prefer origin flexibility and diversify their sourcing. On the other hand, investment and the development of new production capacity can increase supply, especially in countries where raw materials are cheap.

Risks mainly driven by political and geopolitical developments

The war in Ukraine led to a surge in energy prices, sharply raising fertilizer production costs and contracting trade flows. Nitrogen fertilizers were the most affected, as their production is heavily dependent on gas and coal, and their use is harder to postpone than phosphorus or potassium. EU and US sanctions against Russia and Belarus, have also reshaped trade flows (with Belarusian potash exports, for example, being redirected to Asia). [EU tariffs](#) adjustment in 2025 and 2026 should further lead to shifts in trade routes, with growing dependence on Algeria and Egypt, while prompting Russia to seek new markets. This is also expected to affect market prices, challenge EU agricultural sector and increase FOB (*Free On Board*) prices from North Africa.

Geopolitical tensions in the Middle East, remain a major source of instability for the fertilizer market. The region plays a key role in the global energy and fertilizer production (notably nitrogen), with major exporters such as Qatar, Saudi Arabia, Iran, Egypt, Jordan and Israel. About 35% of the global urea exports transit through strategic maritime chokepoints, such as the Strait of Hormuz and the Suez Canal. The conflict in Iran from March 2026 and the resulting disruption to transit through the Strait of Hormuz (accounting for roughly [one-third of global seaborne fertilizer trade](#)¹³ as well as critical inputs such as natural gas, sulphur, and ammonia) highlight this vulnerability, with significant repercussions on fertilizer prices and likely medium to long-term consequences for agricultural production.

Given high import dependence of most countries, fertilizers are generally subject to low tariffs. However, export restrictions by major producer such as Russia or China (which are also major consumers) can push prices upward. Trade policy adjustments, such as US customs duties introduced in early 2025, results in





added market uncertainty, with potential impacts on prices.

National policy developments also influence fertilizer markets (please refer to [Focus on domestic market & policies](#) for further details). In several countries, domestic fertilizer prices are subsidized or controlled by governments, sometimes through public companies, keeping them below global market prices. Governments may also organize imports, distribution, and strategic stockpiling, as in Tunisia, to ensure affordability and secure supply for farmers. In Egypt, urea producers must sell 30-45% of their output domestically at preferential prices. Energy resources can also be reallocated to other sectors, limiting fertilizer exports

Energy and agricultural commodity prices play a major role

Energy prices, especially gas and coal, and related trade restrictions, have a significant impact on fertilizer costs and prices ([gas accounts for 60-80% of nitrogen fertilizer production costs](#)²), especially in regions lacking major domestic energy resources. Other raw material, such as sulfuric acid, and by-product market trends, are also

important to monitor.

Agricultural commodity prices are also key drivers: when crop prices rise, farmers seek to maximize yields and increase fertilizer use, stimulating demand. Fertilizer «affordability» is measured by the [ratio of fertilizer costs to crop prices](#)¹⁴. By definition, [international references prices do not match the prices paid by farmers](#)¹². Crop choices, depending on their nutrient requirements, also influence global demand. For example, potassium demand rises with the expansion of highly potash-consuming crops such as soybeans and oil palm. Conversely, factors like climate, which affect agricultural production prospects, can reduce demand.

Health and environmental considerations can lead to regulatory pressure

Mineral fertilizer production is greenhouse gas-intensive, accounting for up to 3% of global emissions, and contributes to soil and water pollution, affecting both the environment and human health. Some fertilizers also contain hazardous contaminants such as Cadmium. These challenges, in addition to the vulnerabilities and dependencies described above, may push

countries to [reduce](#)² or [optimize fertilizer use](#)¹⁵, shift suppliers, adopt cleaner but costlier production technologies, and promote [organic fertilizers](#)². Organic fertilizer use remains significant in many countries, though reliable data are scarce.

For example, the EU has started to implement in 2026 the Carbon Border Adjustment Mechanism (CBAM), a carbon tariff on carbon intensive products, including fertilizers. The measure should affect producers through higher costs; buyers, some of whom are seeking alternative sources of supply; and exporters, who are investing in carbon auditing systems and low-carbon fertilizers.

Other factors affecting demand and prices

Seasonal demand

Mineral fertilizer demand fluctuates seasonally in line with cropping cycles. For example, demand is lower in the third quarter, especially in the Northern Hemisphere, as imports mainly occur during winter for spring application. In addition, nitrogen must be applied more regularly, whereas phosphorus and potassium are better retained in soils, allowing purchases to be postponed until more favourable

times. Conversely, anticipatory buying may occur when market conditions are favourable.

Currency fluctuations

Exchange rates fluctuation, particularly US dollar volatility, also affects trade and can reduce buyers' purchasing power. For example, a high rate can make direct purchases of agricultural products more attractive for importers than buying fertilizers for future production.

Freight market volatility and supply chain constraints

Many fertilizer trades take place over long distances, making the market sensitive to freight costs, port delays or congestion (e.g., Red Sea shipping bottlenecks resulting from attacks on commercial shipping), and logistical disruptions (e.g., the Black Sea, Strait of Hormuz). Buyers located far from main shipping routes or lacking infrastructure face elevated CIF (Cost, Insurance and Freight) prices.

V. Tools for monitoring the mineral fertilizer market

All of these factors must be taken into account when monitoring the mineral fertilizer market. Several public tools already exist:

- **AMIS** publishes a monthly analysis of recent developments in the mineral fertilizer market in its [AMIS Market Monitor](#), along with updates of several indicators: input prices, fertilizer and nutrient prices, fertilizer cost index, fertilizer/crop price ratio. These are also available in the form of a dashboard on AMIS website. Several dedicated technical notes (AMIS Fertilizer Series, AMIS Market Monitor Background Note) have also been published, while additional ones are under preparation.

- **FAO** has included a dedicated section on the mineral fertilizer market in every edition of the [Food Outlook](#)¹⁶ since June 2024.

- **The European Commission** publishes aggregated data at the EU level via its [agri-food data portal](#) (production, trade, prices by nutrient, use). A [Fertiliser Market](#)

[Observatory](#), established in 2023, regularly discusses market developments with industry stakeholders and farmers. It published monitoring reports, even though member states are not required to report national prices (data are derived from custom declarations and may be subject to late corrections).

- **The IFA** offers a wide range of data on its [website](#).

- Although most data sources are private, the **World Bank** updates monthly mineral fertilizer prices in its [Pink Sheet](#).

For MED-Amin, the main challenge is to centralize relevant information for the Mediterranean context and, ideally, to develop specific indicators such as regional prices and affordability ratio, application rates, or preferential purchasing periods.

Production, imports and distribution: public sector dominance among north African countries

ALGERIA

Algeria maintains a predominantly state-driven system for fertilizer production and distribution, mostly carried out by public entities or companies under state control. The production of nitrogen-based and phosphate fertilizers is overseen by the ASMIDAL Group (a subsidiary of Sonatrach, which falls under the Ministry of Energy), through its subsidiary Fertil¹⁷. A second major nitrogen producer, Sorfert is a joint venture between OCI and Sonatrach. The main production sites are located in Annaba and Arzew, with the majority of output destined for export.

The *Société des Mines de Phosphates* (SOMIPHOS) is the [state's sole phosphates rock producer](#)¹⁸. It is a subsidiary of MANAL (Manadjim El Djazair) group, which represents the government's interests in the mining sector. According to authorities, domestic production cover 100% of national needs of nitrogen fertilizer and [70% of phosphates fertilizers](#)¹⁹.

Imports and domestic distribution are handled by public entities (ASMIDAL and CCLS – *Coopératives de Céréales et de Légumes Secs*), as well as by licensed private companies holding authorizations issued by the government for specialty fertilizers. The domestic market remains dominated by public-sector supply, and private imports have historically been restricted through bans or quotas to protect national production. The government sets a reference price table for subsidized fertilizers and covers a portion of the cost ([up to 50% of the reference price in 2022](#)²⁰). Fertilizer quotas are allocated locally, according to crop and acreage.

EGYPT

Semi-public companies such as Abu Qir Fertilizers and Ferti-globe accounted for a large part of Egypt's nitrogen fertilizer production in 2022²¹. The state also holds

indirect stakes in several fertilizer producers through public holding companies, including El-Nasr for fertilizers & chemical industries, KIMA (Egyptian Chemical Industries) and MOPCO (Misr Fertilizers Production Company).

In the phosphate sector, the NSPO (National Service Projects Organization) participated in the establishment of EMPHCO (Egyptian Marketing Company for Phosphate and Fertilizers) in 2018, in partnership with three other state-owned entities. EMPHCO serves as the exclusive marketing agent for all national phosphate producers. Private companies are also active in the sector.

The majority of domestic demand is met through local production. To safeguard domestic availability, the government requires producers to allocate a significant share of their output to the local market under a quota system, while the remaining volumes may be exported. Fertilizers supplied under this scheme are sold at subsidized prices, and fertilizer producers operate within a state-regulated energy pricing framework.

Fertilizer distribution is primarily carried out through a nationwide network of agricultural cooperatives. The system is managed through the *Farmer Card*, which is used to allocate subsidized fertilizers to eligible farmers and improve traceability. Only fertilizers distributed through the cooperative system are eligible for subsidized prices and quota allocations. Private operators also operate alongside the cooperative network, with prices determined by market conditions.

EU

In the EU, fertilizer production, imports, and distribution are handled by the private sector. EU production is highly sensitive to energy and other inputs prices due to the lack of major domestic energy resources. This makes plants vulnerable to temporary or permanent closure when competitiveness declines, and enhances regional reliance on imports.

The public sector plays a regula-

tory role, under a harmonized EU framework. Public support focuses on reducing import dependency on mineral fertilizers, improving fertilizer use efficiency, and promoting sustainable practices aligned with climate goals and environmental issues. Key instruments include:

- **CAP** (Common Agricultural Policy) Strategic Plans for 2023-2027, including measures to reduce dependence on mineral fertilizers and promote sustainable production (including reduction of fertilizer use, transition to sustainable practices, use of organic fertilizers, etc.).

- **The Nitrates Directive**, which was under evaluation in 2025. New rules on RENURE (Recovered Nitrogen from Manures) have been adopted in 2026, including a modified nitrogen application limit.

- **The Fertilising Products Regulation**, which harmonizes rules for the production of organic and organo-mineral fertilisers. It was also under evaluation, including a review of market effectiveness and contaminant restrictions (e.g. cadmium limits).

- **The CBAM**, which entered into force on 1 January 2026, [raising uncertainties regarding its implementation](#)²².

Regarding imports, EU Member States agreed in 2025 on common **tariff** policies on fertilizers from Russia and Belarus, gradually increasing between July 2025 and July 2028, up to [430€/t](#)²³. Besides, the EU approved in May 2026 a temporary suspension of the 5.5% - 6.5% import duty on fertilizers from non-preferential countries.

LEBANON

Fertilizer production, imports and distribution are regulated by the Ministry of Agriculture (licensing, quality control) but managed mainly by the private sector, with companies such as [Al Zoghbi General Trading Company](#)²⁴, and blending companies, which mainly produce compound and organo-mineral fertilizers.

Lebanon remains highly dependent

on fertilizer imports. Syria was historically a major supplier, but the Syrian Civil War has contributed to disrupting [availability](#)²⁵. The sharp devaluation of the Lebanese pound since 2019 has further driven up prices, with upfront cash payments now required, thereby limiting farmers' access to fertilizers. Since the economic collapse in 2019, public support mechanisms have been nearly nonexistent, severely affecting farmers' access to inputs, including fertilizers.

MOROCCO

The public sector ensures regulatory oversight (licensing and sanitary controls) and market supervision, while the private sector is mainly involved in the import of nitrogen and potash fertilizers and distribution, as well as in blended fertilizers production.

The phosphate sector is almost exclusively publicly owned and vertically integrated, from production to distribution, through OCP (*Office Chérifien des Phosphates*), the world's leading producer of raw phosphates, phosphoric acid, and phosphate fertilizers (controlling 30% of the global phosphate market segment). In 2024, the phosphate sector represented approximately 20% of national exports and around 5-10% of GDP. Operating under a

private-style governance model, OCP holds a monopoly on phosphate extraction and manages [several major mines](#), including Khouribga (accounting for 70% of production with 28 Mt/year, and estimated reserves of 35 billion tons) and Benguerir/Youssoufia (around 5 Mt/year, and large estimated reserves too)²⁵. OCP partners with private firms in phosphate fertilizer production. To produce MAP and DAP fertilizers, OCP imports between 1.5 and 2.0 Mt of ammonia annually. OCP distributes phosphate fertilizers through licensed distributors and local cooperatives. OCP also collaborates with manufacturers and distributors of blended fertilizers tailored to specific needs.

The domestic market is regulated through subsidized reference prices, determined by fertilizer type and crop, to ensure affordable national supply for strategic fertilizers (for instance, at [50% of market prices](#)²⁶ for nitrogen fertilizers for the 2023/24 season).

Regarding exports, since January 1, 2025, Morocco has lowered the cadmium content limit to 20 mg/kg P2O5 to align with European market demand. EU regulation set the threshold at 60 mg/kg P2O5.

TUNISIA

Tunisian fertilizer production is

largely managed by state-owned enterprises. The *Compagnie des Phosphates de Gafsa* is the main industrial player in phosphate rock extraction while the *Groupe Chimique Tunisien* (GCT) ensure the phosphate fertilizer production, through a unified direction. The GCT operates several production sites (e.g., Gabès, El Mdhilla, Skhira) for the manufacturing of phosphoric acid (including through TIFERT, Tunisian Indian Fertilizers, a joint venture with Indian companies), phosphate-based, and nitrogen-based fertilizers. Fertilizer production is intended for both domestic consumption (a part of phosphates is finely ground and use directly on acid soils) and export.

The government play also a central role in defining import regulations, licensing requirements, and market oversight. To address local production deficits, strategic imports of fertilizers and raw materials (such as sulfur and ammonia) are managed directly by the GCT, leveraging public procurement to achieve economies of scale. Meanwhile, specialty fertilizers may be imported by authorized private companies operating under strict state supervision. The government may also adjust import duties or export quotas to secure national supply. The distribution system is organized through a regulated



network of approved actors, including licensed distributors, cooperatives, and officially designated commercial channels. Retail prices for several fertilizers are set to ensure affordability for farmers, supported by public compensation mechanisms.

TÜRKIYE

The vast majority of fertilizer production and imports in Türkiye is handled by private companies (such as Toros Tarım or Gübretaş). Thanks to its strategic geographic location, Türkiye serves as a regional hub for fertilizer trade, sourcing products from the MENA region, Central Asia, and Russia, and re-exporting to Africa and Southeastern Europe.

The government plays primarily a regulatory role, including import and sales authorizations, quality control, and sector oversight. It may adjust import duties and impose export restrictions to ensure domestic supply. Distribution is handled by agricultural cooperatives (e.g. *Tarım Kredi Kooperatifleri*) and licensed private dealers. A Fertilizer Tracking System (GTS) has been implemented in 2018 to improve transparency. Farmers receive subsidies for fertilizer-related costs, which vary by crop and are integrated into a general area-based agricultural support schemes. Since 2019, organic and organomineral fertilizers have received additional support to improve fertilizer use efficiency, reduce environmental pollution, and promote sustainable agriculture.

Ongoing and future projects: leveraging phosphate reserves & developing national capacities

ALGERIA

While Algeria holds significant phosphate reserves, domestic phosphate fertilizer production remains limited. Several major projects involving foreign investors are underway with the objective to produce [5.4 Mt of phosphate fertilizers](#) per year in the future^{27,28}. These include the [integrated phosphate project in Tébessa](#)^{29,30}, which aims to exploit the *Bled El Hadba* deposit

(one of the world's largest reserves, estimated around [2.2-2.8](#)^{10,27} billion tons). Additional initiatives are also targeting the development of potash fertilizers production and the expansion of nitrogen fertilizer production capacities.

EGYPT

Several projects are underway to expand national production capacity, including the expansion of phosphate and nitrogen fertilizer plants. Egypt is also investing in low-carbon ammonia and green hydrogen, partly in response to evolving European import standards³¹.

EU

Several major EU-based fertilizer producers are investing in reducing greenhouse gas emissions by transitioning from fossil-based hydrogen to low-carbon hydrogen, to produce blue and green ammonia. These investments depend on EU policy (e.g., CBAM, funding, permitting) as well as on energy, input and fertilizer prices, affecting profitability and competitiveness.

MOROCCO

The country strategy increasingly emphasizes local value addition, converting raw phosphate into phosphoric acid and finished fertilizers. Numerous investment projects are underway, particularly under the OCP [Green Investment Plan 2023-2027](#)³², a \$13 billion initiative aimed at increasing and decarbonizing production through:

- Production capacity expansion and modernization (e.g. construction of mining and industrial hubs in Mzinda and Meskala, expansion of the Jorf Lasfar platform) to increase fertilizer production capacity to 20 Mt per year by 2027.
- Development of low-carbon ammonia to produce 1 Mt/year of "green" ammonia by 2027, increasing to 3 Mt/year by 2032, through deployment of renewable energy sources. This will reduce import dependency and support low-carbon MAP/DAP production, with the program targeting carbon neutrality by 2040.

- Development of water desalination infrastructure to secure water supply for facilities.

Other initiatives include the development of the *Khemisset* potash deposit in partnership with the *Office National des Hydrocarbures et des Mines*, with reserves estimated at 350 Mt³³.

TUNISIA

Tunisia possesses vast phosphate reserves (notably in the *Gafsa* mining area) and the government aims to increase annual production capacity [to 14 Mt by 2030](#)³⁴ (from approximately 3 Mt currently, after a sharp decrease in 2011). Several projects are underway, including the expansion of existing units (such as the "*Mdhilla 2*" project) and the construction of new plants in *Skhira*, to boost output of phosphoric acid, TSP, and monocalcium phosphate. The country is also investing in green ammonia as part of its national hydrogen strategy. Furthermore, in June 2025, the Ministerial Council approved the creation of public fertilizer stockpiles to secure supply and maintain price accessibility.

TÜRKIYE

Investments are being made in the fertilizer blending industry to produce custom mixes tailored to national and regional demand, including new production facilities.

Acronyms

AMIS: Agricultural Market Information System	GDP: Gross Domestic Product
CAP: Common Agricultural Policy	GTS: <i>Ekolojik Gübre Takip Sistemi</i>
CBAM: Carbon Border Adjustment Mechanism	IFA: International Fertilizer Association
CCLS : <i>Coopératives de Céréales et de Légumes Secs</i>	MAP: Mono-ammonium Phosphate
CIF: Cost, Insurance and Freight	MENA: Middle East and North Africa
CIHEAM: International Centre for Advanced Mediterranean Agronomic Studies	MOP: Muriate of Potash (or Potassium Chloride)
DAP: Di-ammonium Phosphate	NCIC: Nasr Company for Intermediate Chemical
EMPHCO: Egyptian Marketing Company for Phosphate and Fertilizers	NSPO: National Service Projects Organization
EU: European Union	OCP: <i>Office Chérifien des Phosphates</i>
FAO: Food and Agriculture Organization of the United Nations	ROW: Rest of the World
FOB: Free On Board	SOP: Sulphate of Potash
GCT: <i>Groupe Chimique Tunisien</i>	TSP: Triple Superphosphate
	USGS: U.S. Geological Survey

References

1. *Fertilizer markets amid shifts in global trade*. (2025, May 14). AMIS Agricultural Market Information System. <https://www.amis-outlook.org/list-details/news/b62wzybfscjux3v1hwj9tuho>
2. Jones, D., & Deuss, A. (2024). *Understanding the resilience of fertiliser markets to shocks: An overview of fertiliser policies* (OECD Food, Agriculture and Fisheries Papers, No. 208). OECD Publishing. <https://doi.org/10.1787/43664170-en>
3. AMIS Agricultural Market Information System. (2024). *Introduction to fertilizers* (AMIS Fertilizer Series, No. 1). https://storage.googleapis.com/amis-9189b-strapi/Fertilizer_series_Intro_to_fertilizers_4875356e31/Fertilizer_series_Intro_to_fertilizers_4875356e31.pdf
4. AMIS Agricultural Market Information System. (2025). *Production of mineral fertilizers* (AMIS Fertilizer Series, No. 2). https://storage.googleapis.com/amis-9189b-strapi/1_AMIS_Fertilizer_series_Fertilizer_production_073a82c786/1_AMIS_Fertilizer_series_Fertilizer_production_073a82c786.pdf
5. Benalia, S. (2022, October 6). *L'Algérie, un géant du marché mondial des engrais*. L'Expression. <https://www.lexpressiondz.com/economie/les-investisseurs-etrangeurs-tres-interesses-361506>
6. Rédaction AE. (2022, October 2). *L'Algérie exporte environ 7 millions de tonnes d'engrais*. Algerie Eco. <https://algerie-eco.com/2022/10/02/lalgerie-exporte-environ-7-millions-de-tonnes-dengrais/>
7. *Petrochemical Market Review March 2025*. (2025, March). Green Gubre Group. <https://www.greengubregroup.com/Market-Reports/2025-March>
8. *Phosphate Rock Resources & Reserves*. (2023). Argus / IFA. https://www.fertilizer.org/wp-content/uploads/2023/04/2023_Argus_IFA_Phosphate_Rock_Resources_and_Reserves_Final.pdf
9. *Mineral commodity summaries 2022* (Mineral Commodity Summaries). (2022). U.S. Geological Survey. <https://doi.org/10.3133/mcs2022>
10. *Mineral commodity summaries 2024* (Mineral Commodity Summaries). (2024). U.S. Geological Survey. <https://doi.org/10.3133/mcs2024>
11. *Mineral commodity summaries 2025* (Mineral Commodity Summaries). (2025). U.S. Geological Survey. <https://doi.org/10.3133/mcs2025>
12. Cross, L., Gruère, A., De Sousa, J., & Chtioui, H. (2024). *Public Summary – Medium-Term Fertilizer Outlook 2024–2028*. IFA. https://www.fertilizer.org/wp-content/uploads/2024/08/2024_ifa_medium_term_outlook_report.pdf
13. *Strait of Hormuz disruptions: Implications for global trade and development* (2026, March 10). UN Trade And Development (UNCTAD). UNCTAD/OSG/TT/INF/2026/1. <https://unctad.org/system/files/official-document/osgt-tinf2026d1-en.pdf>
14. AMIS Agricultural Market Information System. (2024). *AMIS fertilizer/crop price ratio* (AMIS Market Monitor Background Note, No. 2). https://storage.googleapis.com/amis-9189b-strapi/Fertilizer_Background_Note_2_AMIS_fertilizercrop_price_ratio_77ad6745c7/Fertilizer_Background_Note_2_AMIS_fertilizercrop_price_ratio_77ad6745c7.pdf

15. FAO. (2025). Sustainable nitrogen management in agrifood systems. <https://doi.org/10.4060/cd3388en>
16. FAO. (2025). Food Outlook – Biannual report on global food markets. Food Outlook, June 2025. <https://doi.org/10.4060/cd5655en>
17. A.B. (2024, June 15). Asmidal prend le contrôle à 100 % de Fertial. L'Algérie Aujourd'hui. <https://lalgerieaujourd'hui.dz/asmidal-prend-le-contrôle-a-100-de-fertial/>
18. Minerals Yearbook, volume III, Area Reports—International—Africa and the Middle East. (2024). U.S. Geological Survey. <https://pubs.usgs.gov/myb/vol3/2019/myb3-2019-africa-middle-east.pdf>
19. Aziouez, S. (2023, September 16). Production d'engrais : Asmidal fixe ses objectifs. La Sentinelle. <https://lasentinelles.dz/index.php/2023/09/16/production-dengrais-asmidal-fixe-ses-objectifs/>
20. Rédaction AE. (2022, octobre 5). Engrais : l'Etat soutient les prix à 50 %. Algerie Eco. <https://algerie-eco.com/2022/10/05/engrais-letat-soutient-les-prix-a-50/>
21. Oldenburg, M., Boitiere, A., Malinbaum, S., Boumahdi, M. A., & Cosson, A. (2022). La lettre économique d'Égypte–Avril 2022 (No. 127). Direction générale du Trésor, Ministère de l'Economie, des Finances et de la Relance. <https://www.tresor.economie.gouv.fr/Articles/44f7c8ce-654f-45a5-a2a8-3eba59c1e181/files/d7213269-cd8d-4aa7-9f14-05fa9b9b4908>
22. McDonald, J. (2026, February 5). CBAM uncertainty stalls EU fertilizer trade ahead of spring demand. S&P Global. <https://www.spglobal.com/energy/en/news-research/latest-news/fertilizers/020526-cbam-uncertainty-stalls-eu-fertilizer-trade-ahead-of-spring-demand>
23. Kushwaha, S. (2025, June 6). EU's staged fertiliser tariffs to increase costs for farmers through 2028. Kpler. <https://www.kpler.com/blog/eus-staged-fertiliser-tariffs-to-increase-costs-for-farmers-through-2028>
24. Dal, E., Díaz-González, A. M., Morales-Opazo, C., & Vigani, M. (2021). Agricultural sector review in Lebanon. FAO Agricultural Development Economics Technical Study (No. 12). Rome, FAO. <https://doi.org/10.4060/cb5157en>
25. Engrais phosphatés. (2025, May 9). L'Élémentarium. <https://lelementarium.fr/product/engrais-phosphates/>
26. Sylla, A. (2023, December 5). Mohamed Sadiki : « Les subventions aux agriculteurs sont censées garantir l'approvisionnement du marché national ». Challenge.ma. <https://www.challenge.ma/mohamed-sadiki-les-subventions-aux-agriculteurs-sont-censees-garantir-lapprovisionnement-du-marche-national-272904/>
27. Bendhaou, F. (2022, March 23). Algérie-Chine : Un investissement de 7 milliards de dollars pour la production de Phosphate. Anadolu Ajansi. <https://www.aa.com.tr/fr/afrique/alg%C3%A9rie-chine-un-investissement-de-7-milliards-de-dollars-pour-la-production-de-phosphate-/2543833>
28. Signature d'un Protocole d'Accord entre les Groupes ASMIDAL et MANAL en vue de la création d'une société pour la transformation chimique des phosphates. (2021, August 9). Ministère de l'énergie. <https://www.oilmines.gov.dz/?article=signature-d-un-protocole-d-accord-entre-les-groupes-asmidal-et-manal-en-vue-de-la-cr%C3%A9ation-d-une-soci%C3%A9t%C3%A9-pour-la-transformation-chimique-des-phosphates>
29. Boukhari, R. (2024, November 16). Lancement du projet de phosphate intégré : Une nouvelle ère pour l'industrie minière algérienne. Le Jeune Indépendant. <https://www.jeune-independant.net/lancement-du-projet-de-phosphate-integre-une-nouvelle-ere-pour-lindustrie-mini%C3%A8re-alg%C3%A9rienne>
30. SOFRECO désigné pour les études du projet de transformation des phosphates de Tebessa (2023, April 6). Team France Export. <https://www.teamfrance-export.fr/infos-sectorielles/23986/23986-sofreco-designe-pour-les-etudes-du-projet-de-transformation-des-phosphates-de-tebessa>
31. Directorate-General for the Middle East, North Africa and The Gulf. (2026, 10 février). EU and Egypt launch initiatives for sustainable energy cooperation. https://north-africa-middle-east-gulf.ec.europa.eu/news/eu-and-egypt-launch-initiatives-sustainable-energy-cooperation-2026-02-10_en
32. Investment Plan. OCP. <https://www.ocpgroup.ma/en/our-sustainability-commitments/investment-plan>
33. Oudoud, L. (2024, January 22). OCP : lancement d'un projet d'exploitation de la potasse dans la région de Khémisset. Le 360. https://fr.le360.ma/economie/ocp-lancement-dun-projet-dexploitation-de-la-potasse-dans-la-region-de-khemisset_LCQWDBPK3NE6VEYCYWJRYQC7AU/
34. Sèdjro Houenou, A., Bewa, F. (2025, March 7). La Tunisie veut redevenir un des principaux producteurs mondiaux de phosphate. Agence Ecofin. <https://www.agenceecofin.com/actualites-industries/0703-126452-la-tunisie-veut-redevenir-un-des-principaux-producteurs-mondiaux-de-phosphate>

The MED-Amin network

The MED-Amin multilateral network was established in 2014 at the request of the Ministers of Agriculture of the 13 member countries of the CIHEAM – the International Centre for Advanced Mediterranean Agronomic Studies – (Albania, Algeria, Egypt, France, Greece, Italy, Lebanon, Malta, Morocco, Portugal, Spain, Tunisia, Türkiye). It aims to foster cooperation and the sharing of experiences among national cereal market information systems across the Mediterranean, with the aim of improving transparency and providing higher quality information, similar to the G20+7 Agricultural Market Information System (AMIS) initiative.

MED-Amin in figures

Over the period 2021–2024, the member countries of the network accounted for:

- 6%** of the world's population (505 million inhabitants in 2024, according to the World Bank)
- 45%** of global durum wheat production (15 Mt), **80%** of global durum wheat imports (6.7 Mt)
- 10%** of global soft wheat production (77 Mt), **25%** of global soft wheat imports (49 Mt)
- 21%** of global barley production (30 Mt), **22%** of global barley imports (7 Mt)
- 3%** of global maize production (40 Mt), **21%** of global maize imports (40 Mt)

Disclaimer

While MED-Amin endeavours to ensure the accuracy of the information contained in its reports, data are obtained from a range of external sources. Accordingly, neither MED-Amin nor its members warrant or guarantee any information published, and they disclaim any liability for any direct or indirect consequences arising from the use of, or reliance upon, this report.

The mention of specific companies does not imply that these have been endorsed or recommended by MED-Amin in preference to others of a similar nature that are not mentioned.

Acknowledgements

The author thanks MED-Amin Focal Points and other national contacts for their contributions to this document as well as AMIS and FAO for their crucial inputs, research assistance, review and suggestions. An additional thanks goes to European Commission DG AGRI for their inputs regarding EU policy.

We would also like to express our sincere thanks to Maria Antip and Monika Tothova of FAO's Markets and Trade Division for their valuable comments and guidance during the preparation of this document

Copyright

The reuse of this document is authorised under the Creative Commons Attribution 4.0 International (CC BY 4.0) licence.

Information note N°1 – September 2026



Website: www.med-amin.org



Email: contact@med-amin.fr



LinkedIn: linkedin.com/in/med-amin-network



X: x.com/MEDAmin_network



Bluesky: bsky.app/profile/med-amin.bsky.social

MED-Amin Coordination:
CIHEAM Montpellier