2020 Fertilizer Consumption in Sub-Saharan Africa

August 2022

IFA Survey on SSA Fertilizer Use

Methodology:

The Sub-Saharan Africa (SSA) fertilizer consumption database is updated once a year (year N) for 41 countries with data for year N-2 for countries with statistics in calendar years and for N-2/N-1 for countries with statistics in fertilizer years

Fertilizer use estimates are collected by way of questionnaires (SSA consumption survey) sent to IFA members and non-members with activities and/or insights on fertilizer use in the SSA region

The estimates collected are fertilizer nutrient aggregates (total N, P_2O_5 and K_2O) of consumption at the national level. These are from a combination of public statistics and expert estimates

Estimates received are processed and aggregated at a sub-regional level – western, central, eastern and southern Africa sub-regions. In addition, while preserving the confidentiality of the national consumption estimates, disaggregated nutrient use estimates for countries with an annual fertilizer use rate exceeding 200kt nutrients (for three consecutive years) are made available

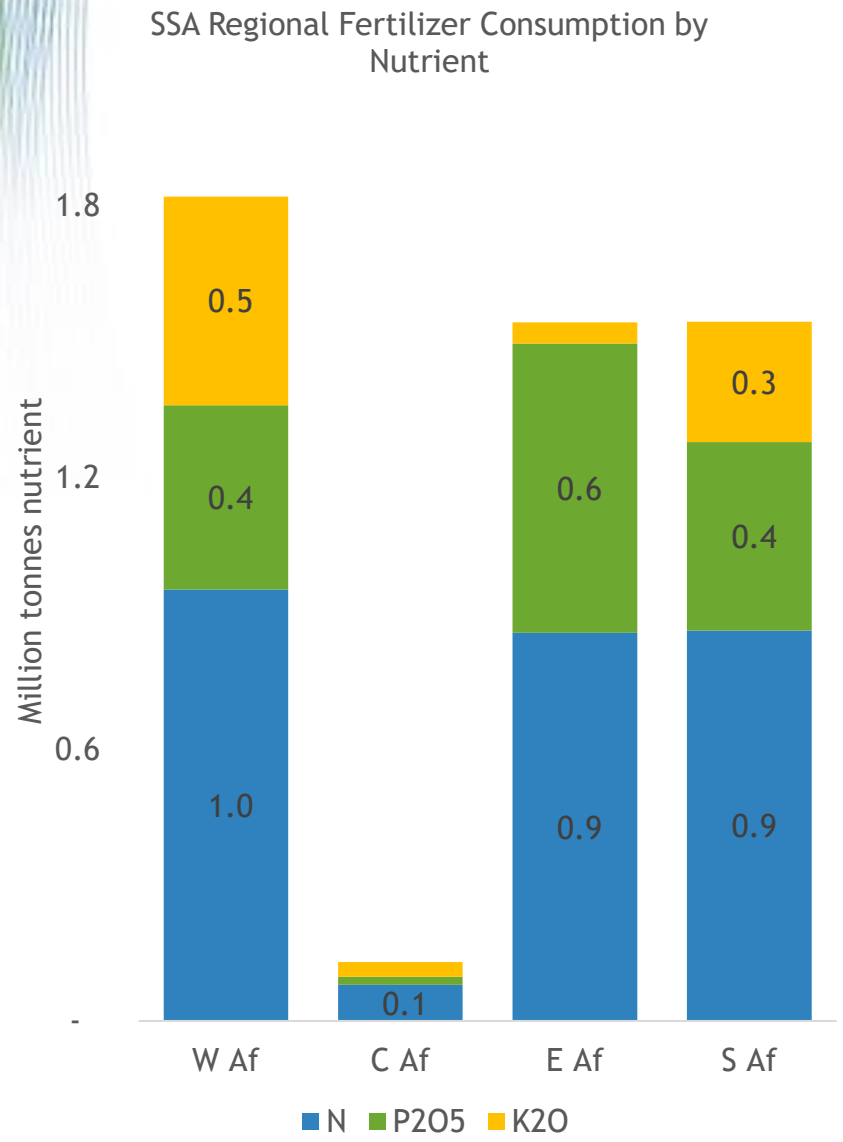
Notes:

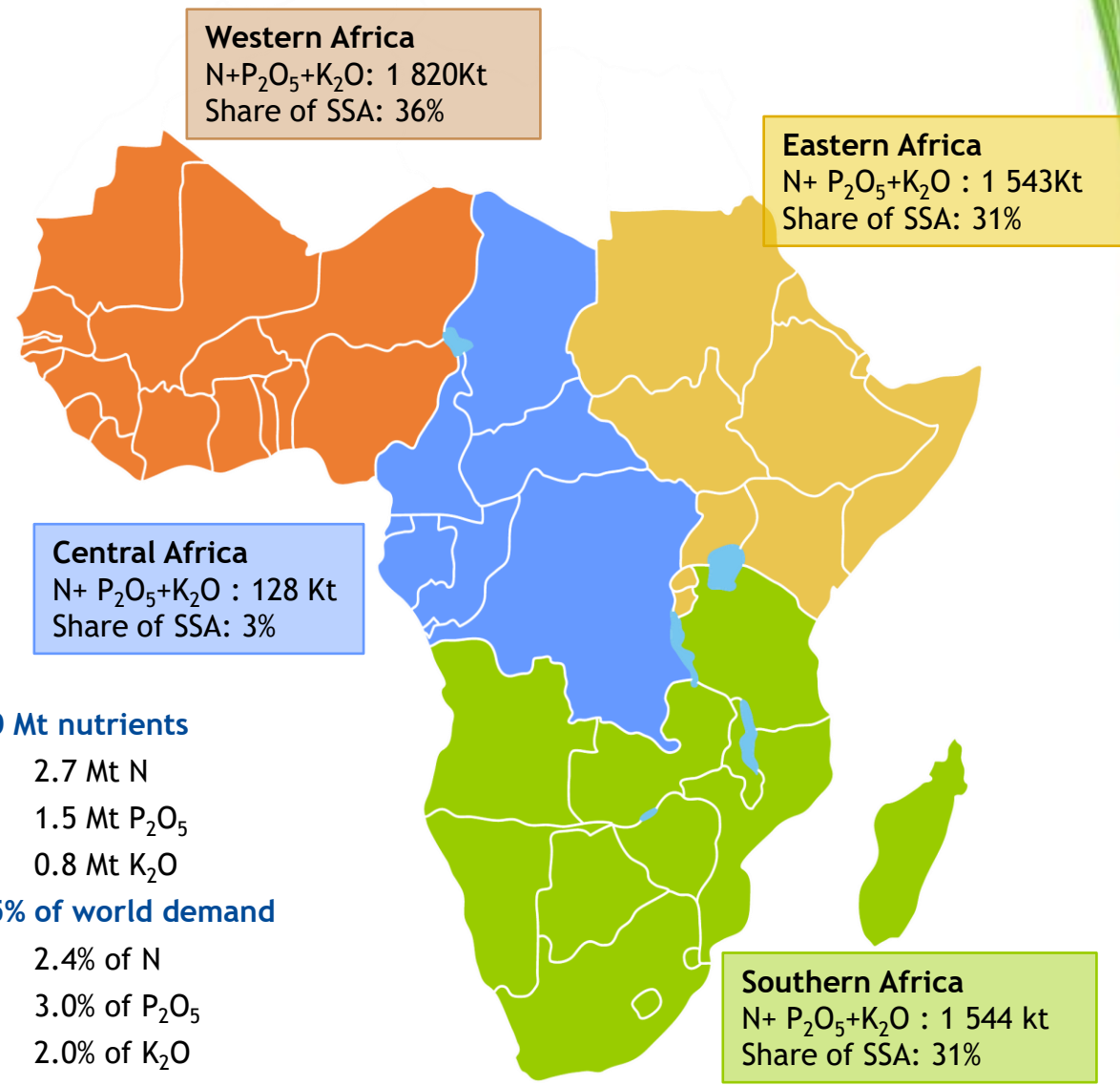
The SSA consumption survey collates data for 41 SSA countries while IFA's historical consumption survey primarily collates data for 13 SSA countries and the remaining countries are grouped and reported under 'others Africa'

The SSA consumption survey collates aggregated nutrient tonnes (total N, P_2O_5 and K_2O) by country while the historical consumption survey collates disaggregated nutrient and/or product tonnes by fertilizer product

For some countries, the fertilizer use estimates resulting from the SSA consumption survey differ from those published in the historical consumption database due to a variation in the data collection methodology

SSA consumed 5.0 Mt nutrients in 2020, ~19% increase vs 2019





5.0 Mt nutrients

- 2.7 Mt N
- 1.5 Mt P_2O_5
- 0.8 Mt K_2O

2.5% of world demand

- 2.4% of N
- 3.0% of P_2O_5
- 2.0% of K_2O

IFA SSA consumption survey, July 2022

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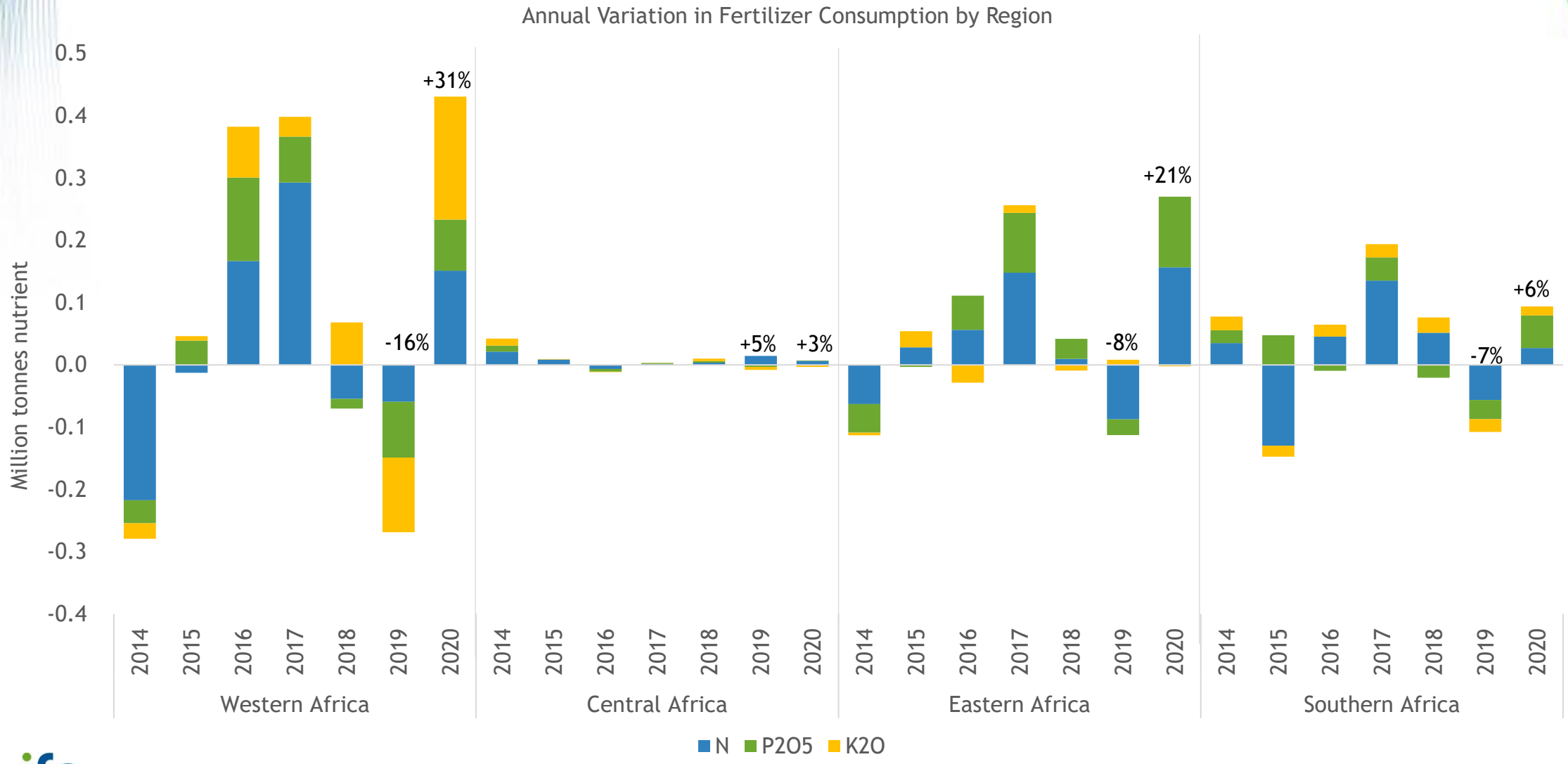
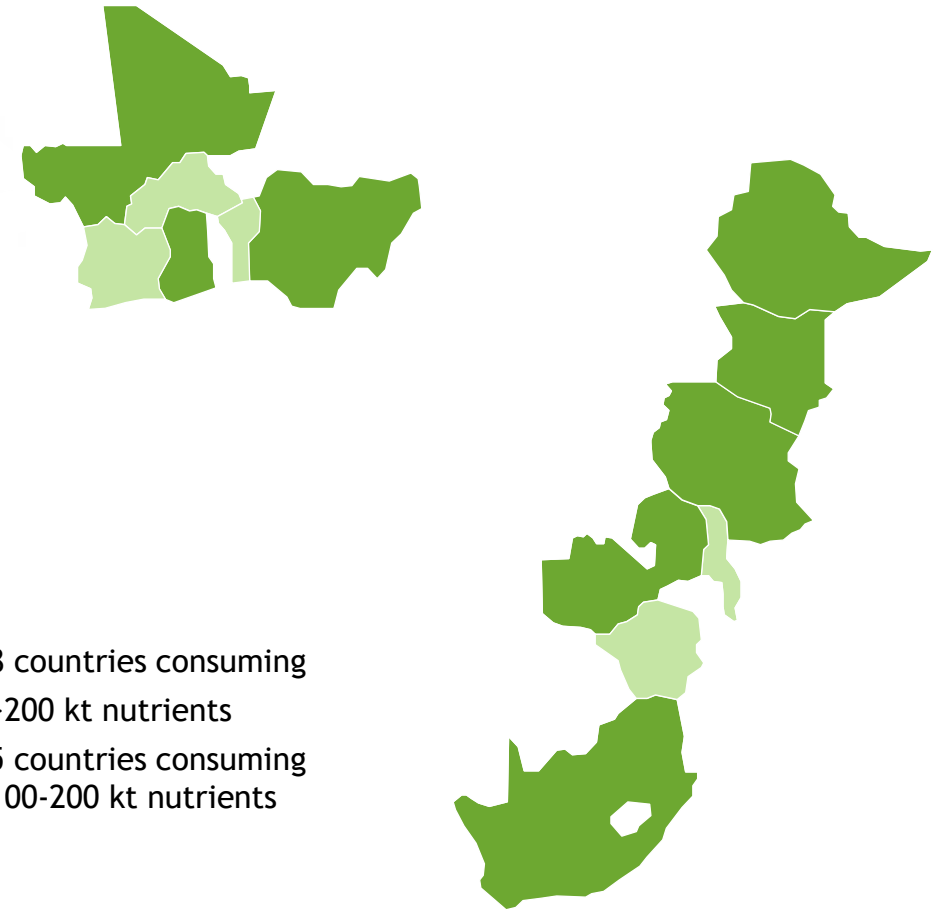
Nigeria, Tanzania, Ethiopia and Ghana highest contributors to the increase in fertilizer use in 2020



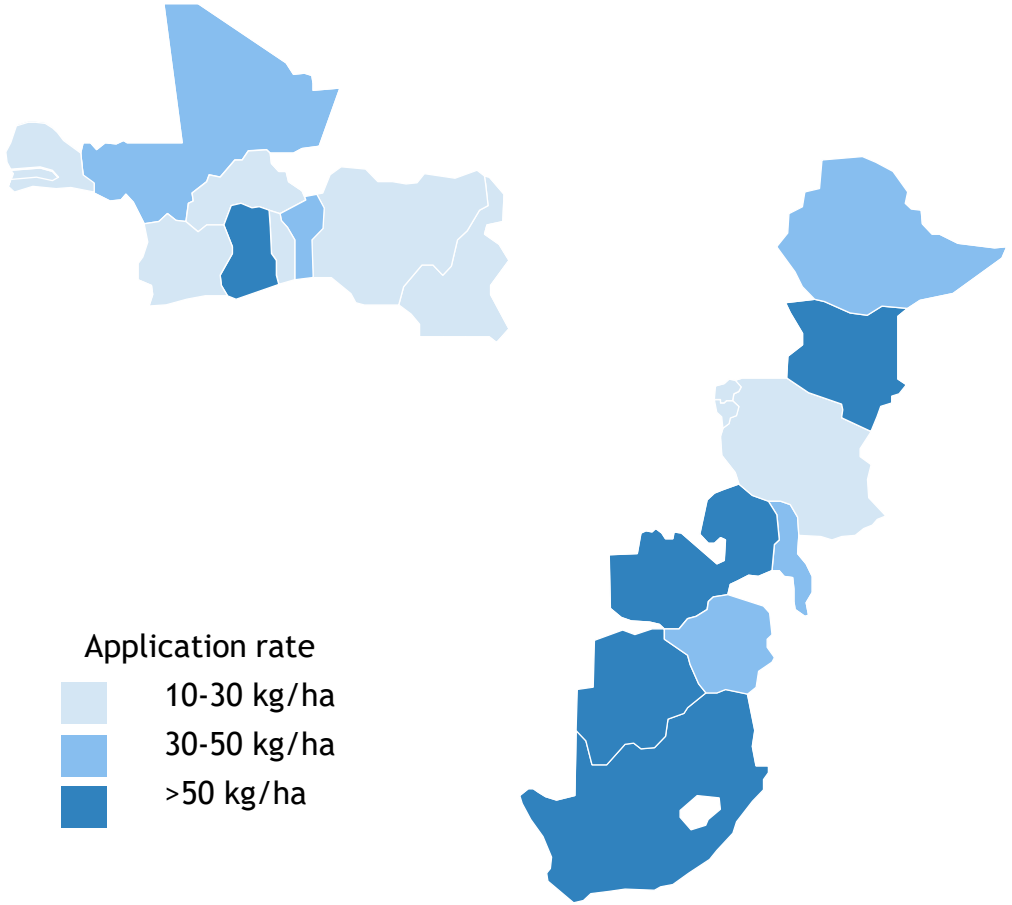
IFA SSA consumption survey, July 2022

More countries recorded +200 kt in 2020, however, only 5 countries still using +50 kg/ha

2020 Fertilizer Use (kt nutrients)



2020 Average Fertilizer Application Rate (kg nutrients/ha cropland)



Fertilizer use - IFA SSA consumption survey, July 2022
Cropland area - FAOSTAT 2022

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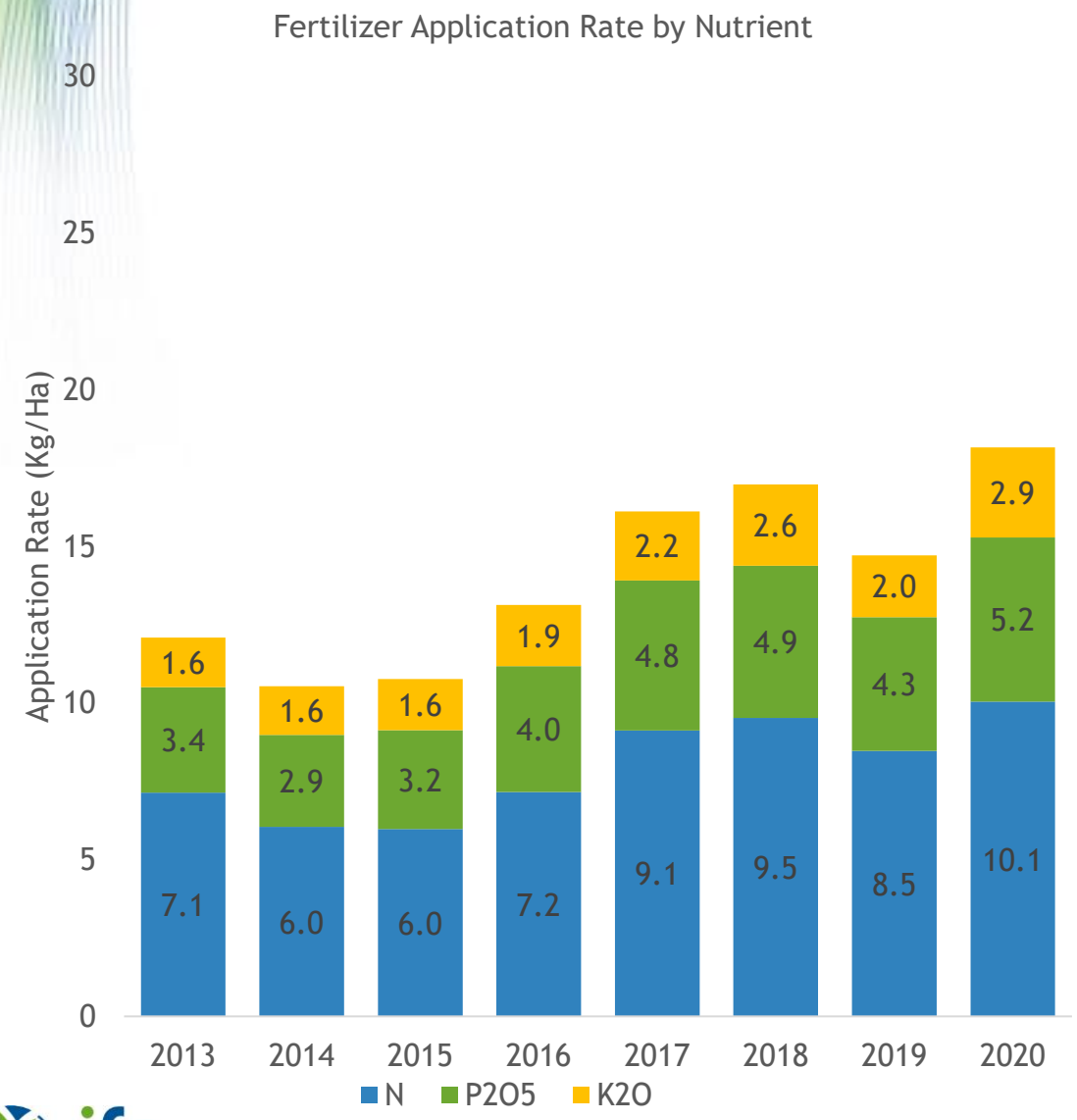
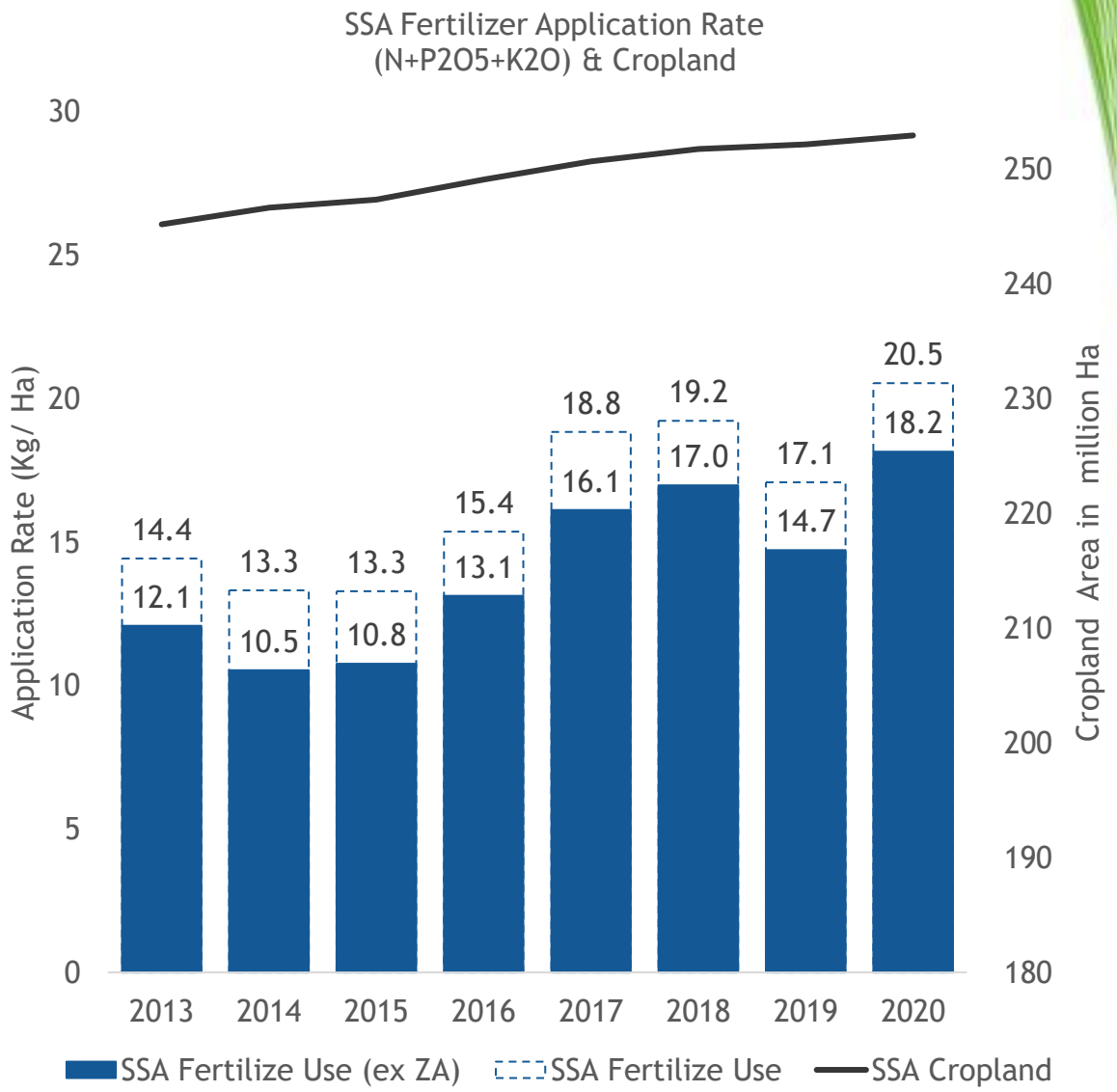
Rebound in fertilizer use attributed to increased application rates

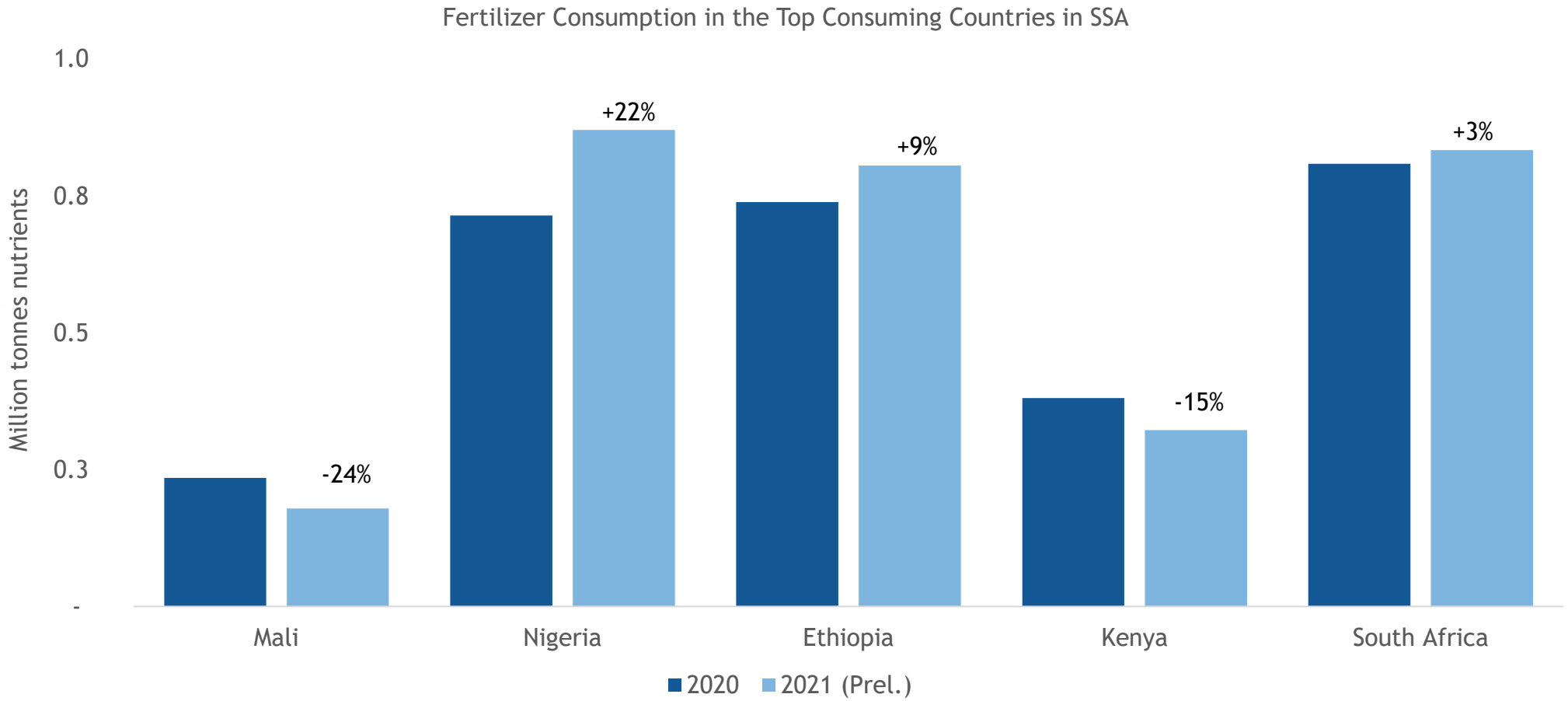




SSA nutrient application rate excluding South Africa (ZA)

Fertilizer use - IFA SSA consumption survey, July 2022
Cropland area - FAOSTAT 2022
SSA fertilizer use including South Africa (ZA)

19% growth in 2020 vs 5% growth in 2021 for the top SSA consumers



IFA SSA consumption survey, July 2022

- In 2020, Ethiopia, Kenya, Mali, Nigeria and South Africa accounted for 58% of the total fertilizer consumed in SSA.
- In 2021, consumption in Mali dropped to <200kt nutrients
- The decline in the growth rate in 2021 vs 2020 was primarily driven by the global commodity price crisis
- In addition, carryover stocks from 2020 constituted a considerable proportion of the fertilizers consumed in 2021 in Kenya and Mali.

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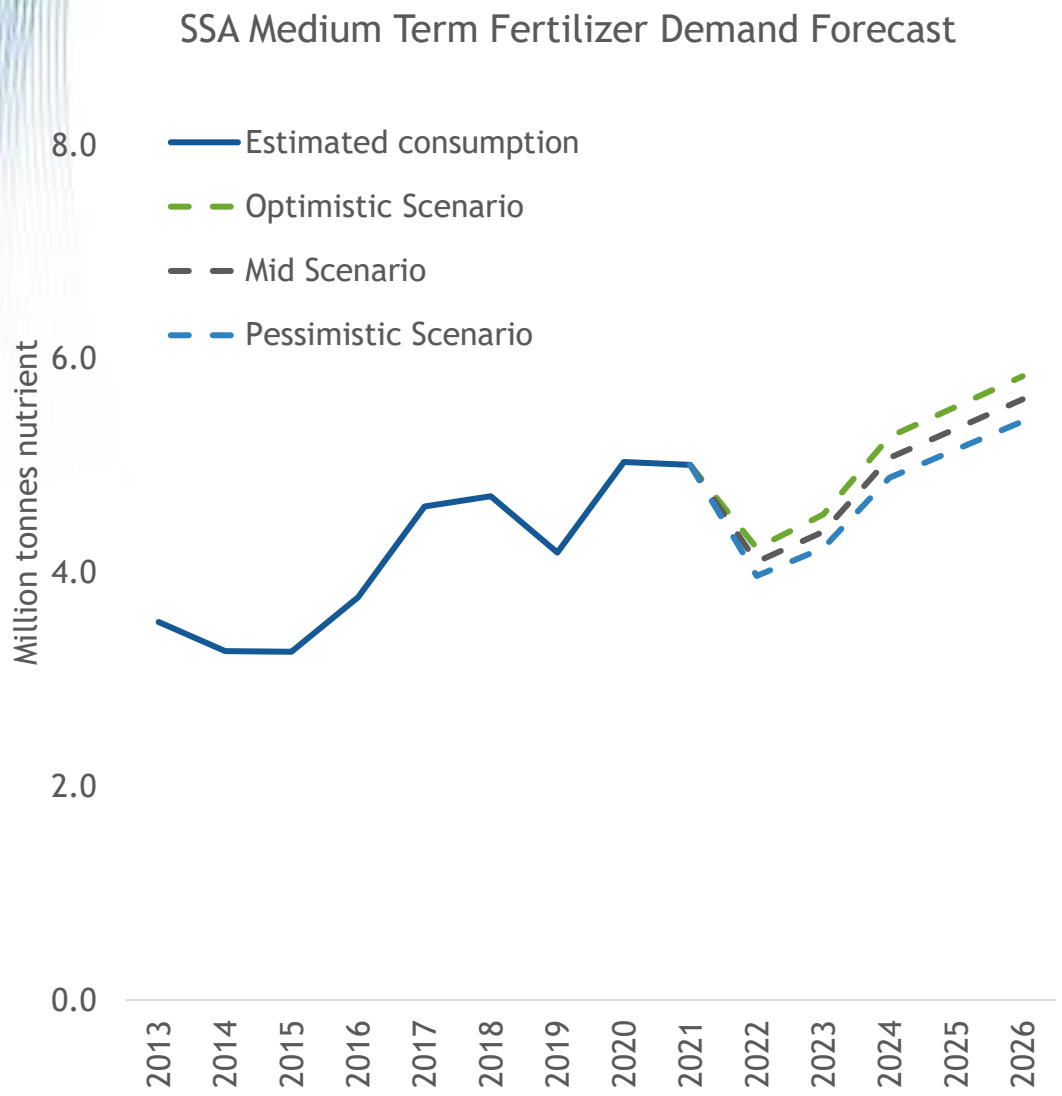
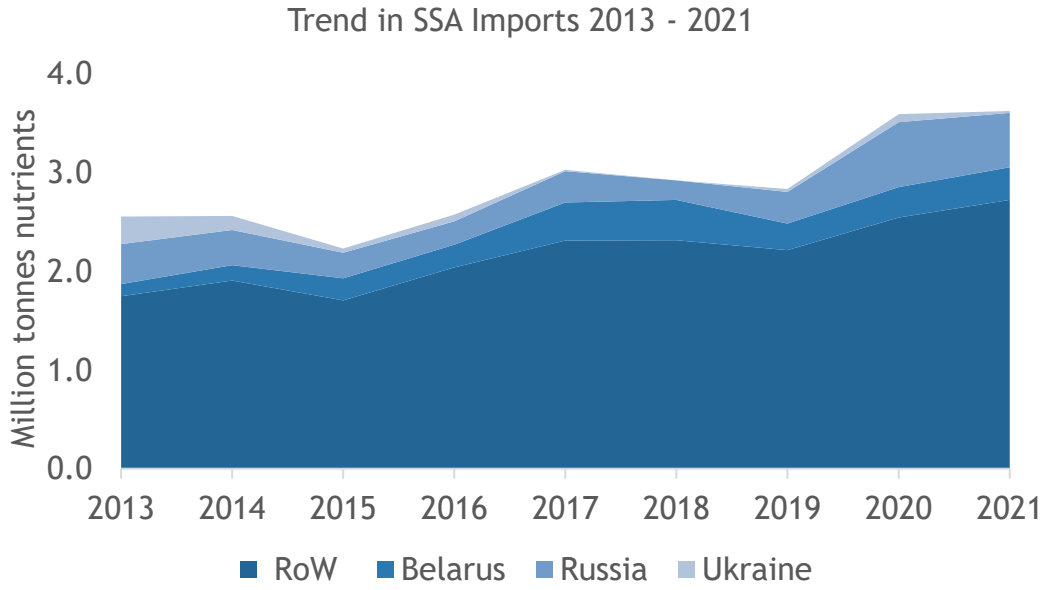
SSA Fertilizer Demand Forecast – Medium Term (June 2022)



- The annual growth rate in SSA is estimated at CAGR +3.9% p.a for 2013-2021.
- In the medium term, under the 3 possible scenarios, demand is anticipated to initially decline by up to 21% in 2022 compared to 2021, and thereafter rebound at an estimated growth rate of +6% p.a over 2023-2026.

Issues likely to impact demand include:

- Fertilizers availability vs affordability as efforts by government to cushion farmers e.g., price and product subsidies tend to be limited
- Potential unavailability of fertilizers due to e.g., imposed trade quotas and trade embargoes, affecting both the local and regional markets e.g., Tanzania and Mali, respectively.
- The Russia-Ukraine war is anticipated to relatively affect availability of fertilizers, as approximately 25% of imports into the SSA region were sourced from Russia, Ukraine and Belarus in 2021.



IFA Medium Term Demand Forecast, June 2022
Consumption: IFA Historical Demand Database, 2022

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For additional Information:

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