

Update of fertilizer supply and demand – Sub Saharan Africa

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Fertilizer consumption SSA 08/09 (IFA)

Global NPK consumption	165	Mt
NPK consumption in Africa	4.35	Mt
NPK consumption North Africa	2.34	Mt
• Egypt	1.64	
• Rest of North Africa	0.70	
NPK consumption S-Africa	0.72	Mt
Consumption SSA	1.29	Mt

SSA: **10% of global population**
 0.8% of global fertilizer consumption

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Fertilizer consumption SSA 08/09 (IFA)

Total NPK consumption SSA 1.29 Mt

- West Africa (mainly cotton, cocoa) 23%
- Nigeria (food crops, cotton) 23%
- Kenya-Ethiopia-Tanzania-Zambia-Malawi 40%
- Rest (40 countries) 14%

Average fertilizer use 7-8 kg/ha

Mainly cash crops, little for food crops

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Why consumption is low

AVAILABILITY

- Markets are small, fragmented (why invest?)
- Poorly developed distribution channels, dealer networks

ACCESSIBILITY

- SSA fertilizer prices high as compared to other continents
- Access to credit at all levels

Why consumption is low

LIMITED CREATION OF DEMAND – NO INCENTIVES

- Access to best agricultural practices
- Degree of organization of farmers
- Poorly developed value chains

Non conducive policy environment – but improving

Projections for demand development

Countries without subsidies

- Decrease in overall fertilizer use
- Stable for plantation crops

Countries with subsidies

- ‘Some’ increase

Purely speculative

Development of supply in SSA

Current supply

- Senegal+Zimbabwe+Zambia <100,000 mt
- Nigeria: NOTORE started production Jan09
- Several uncertain plans for rehabilitation of idling plants and construction of new plans

Projections purely speculative

Fertilizer data quality and data needs

- Last FAO data 2006 statistics, inaccurate and incomplete
- National fertilizer data often absent or inaccurate
- Each country has its own data collection approach
- Difficult to monitor changes in fertilizer used based on current data

Needed: a comprehensive methodology

- **Total fertilizer consumption per country**
- **Accurate estimate of average use per ha for major crops**