



EU Fertiliser Market analysis

*European Commission, DG Agriculture and Rural Development
AGRI.E.1 Governance of the Agri-food Markets*

EU Fertilisers market analysis

- Production of fertilisers and nitrogen compounds
- Imports trends, EU and intra-EU
- Imports from Russia
- Prices
- Fertilisers affordability vs cereal prices

Fertiliser

Market data on fertilisers in the European Markets provided by the European Commission's agricultural and rural development department. Browse visualisations about imports, exports, average prices and production.



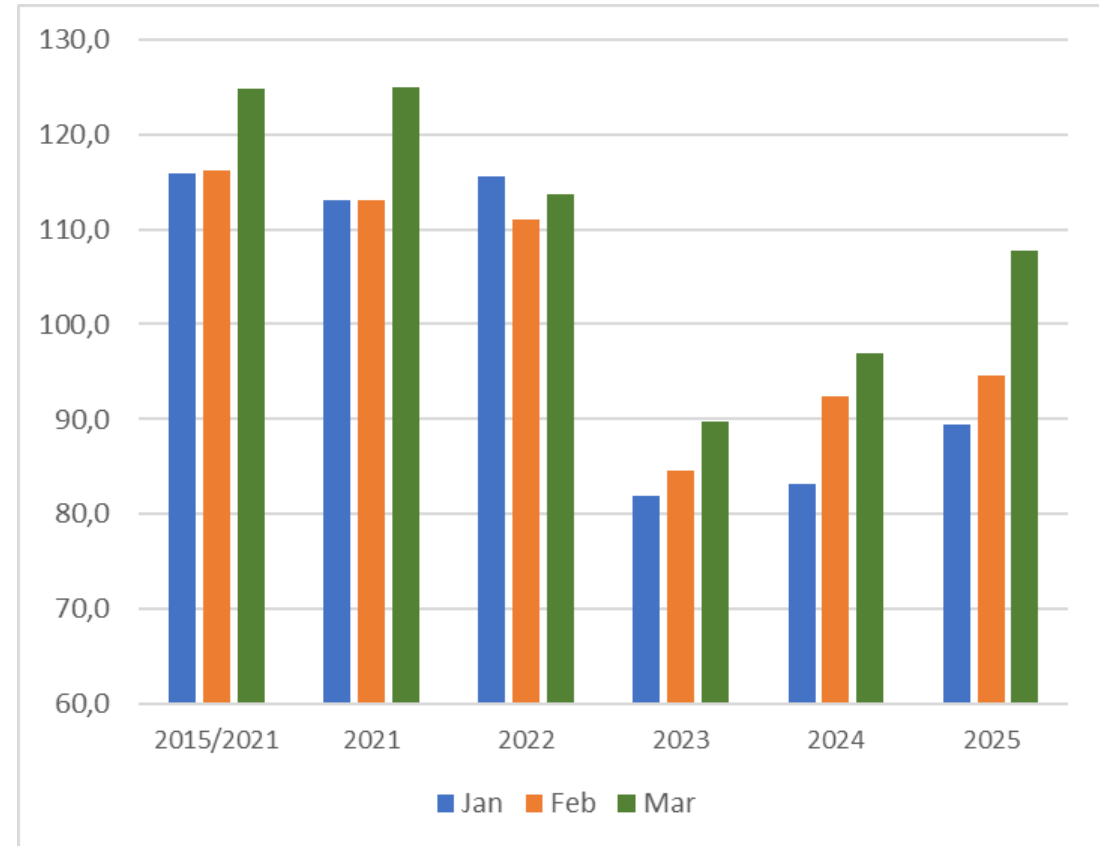
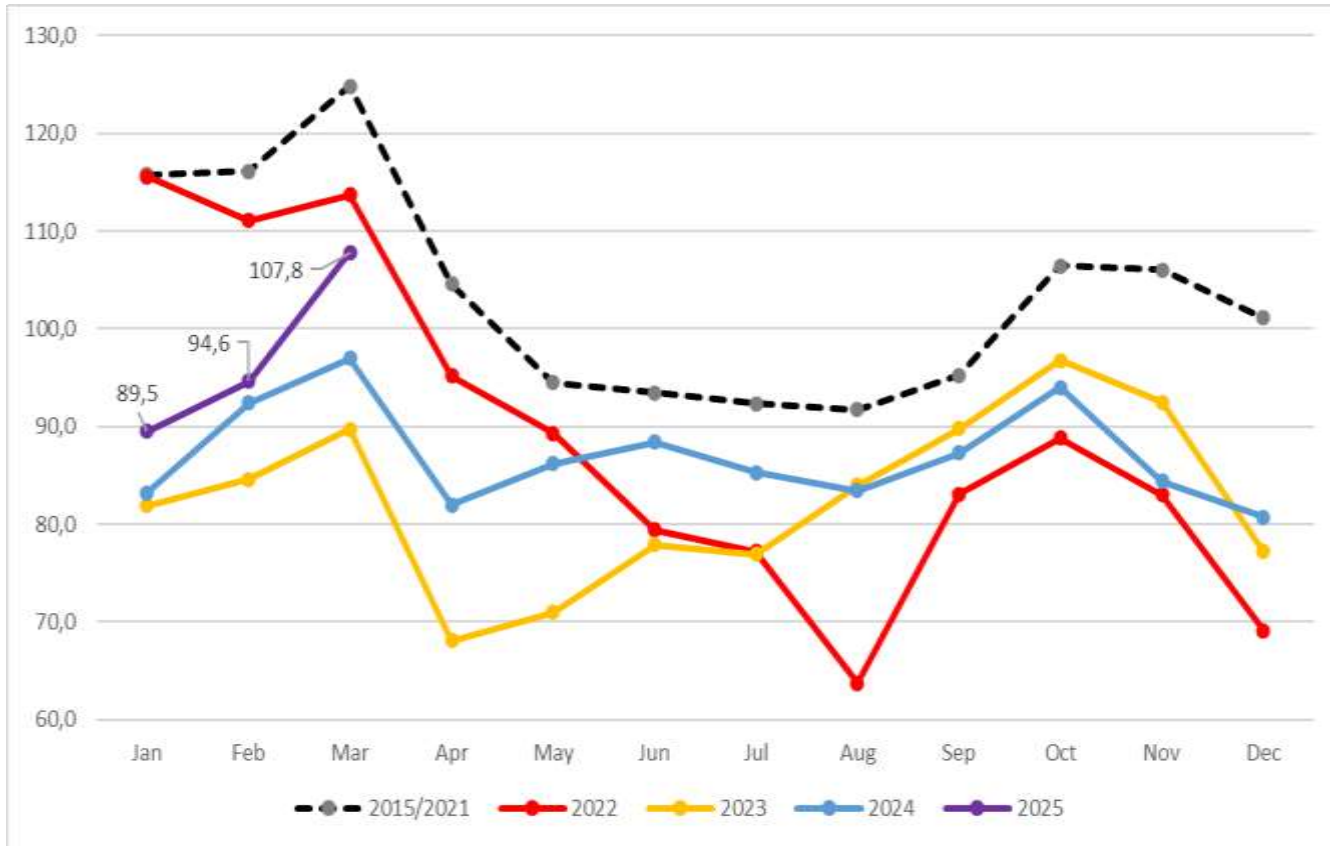
Fertiliser

Mixed fertilisers are classified on the basis of type and form of nutrients they contain; the major nutrients are nitrogen (N), phosphorus (P) and potassium (K).
Farmer's exposure to fertilizer price volatility influences application rates and may threaten to drive down production.
Fertiliser production is an energy intensive industrial processes, and natural gas is the feedstock for manufacturing nitrogen based fertilisers; moreover European industry relies on potash and phosphorus imports as natural reserves in the EU are limited.

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

Production of fertilisers

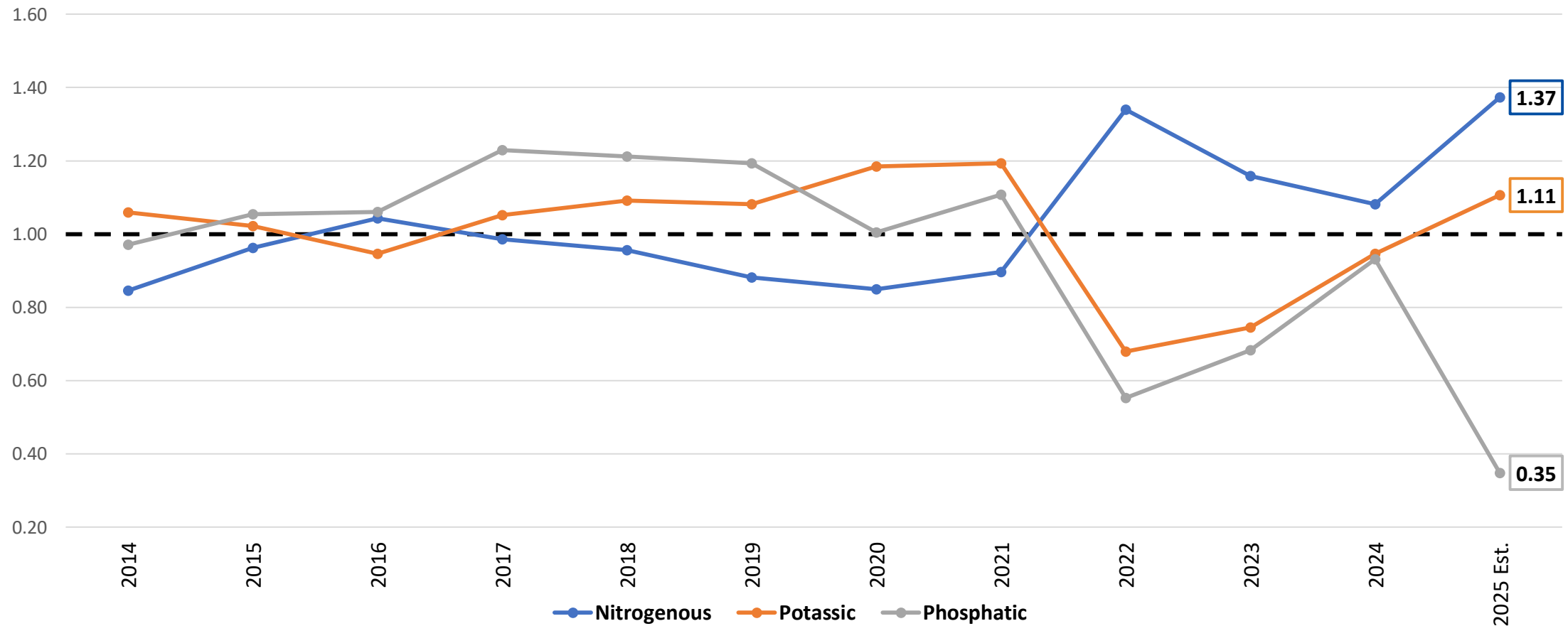
Monthly index of manufacture of fertilisers and nitrogen compounds (EU-20)
2021 = 100



Given past trends of reduced production in the second quarter, do you anticipate the production index to remain steady at around 100%?

Yearly fertiliser import trends

variation relative to the 10y average

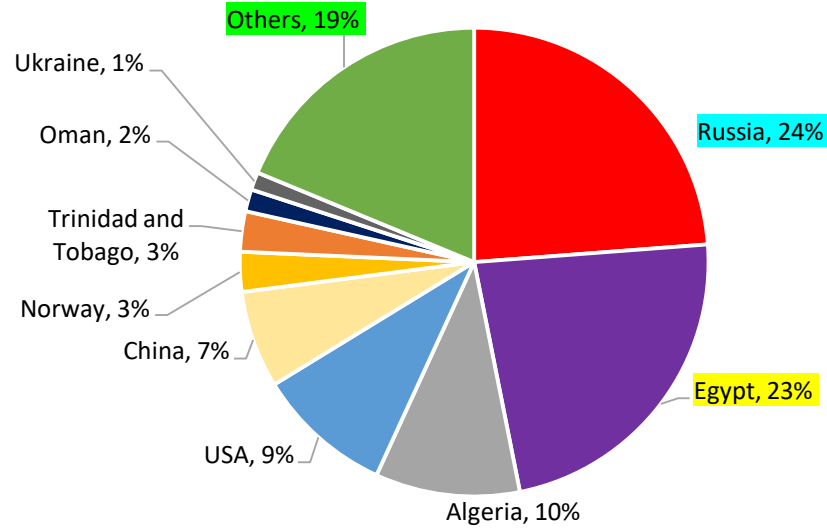


What is your perspective on the low projections for phosphatic fertiliser imports? Please note that imports of phosphates are above average for the same period.

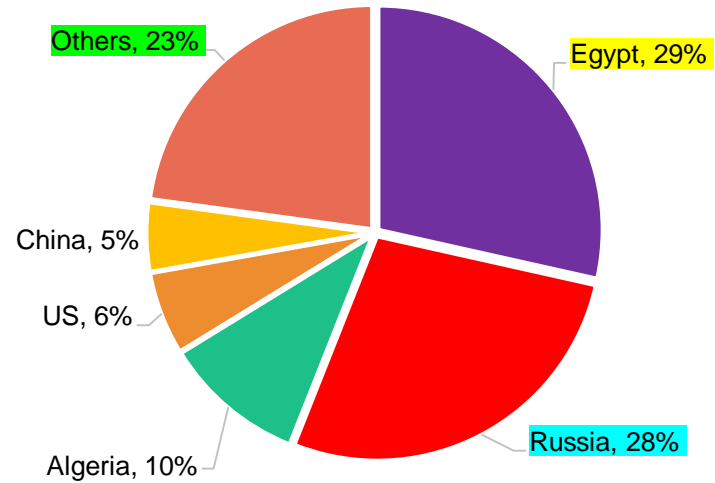


Nitrogen fertilisers imports

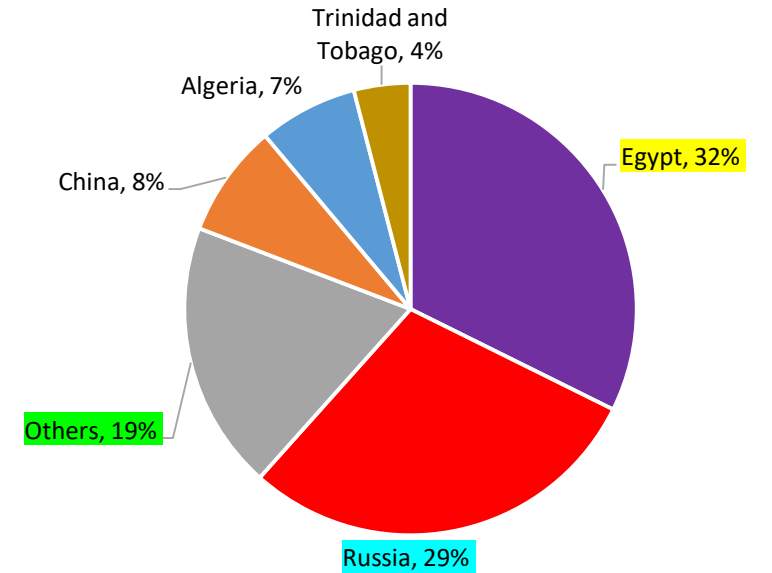
2023



2024



2025 Jan-Apr



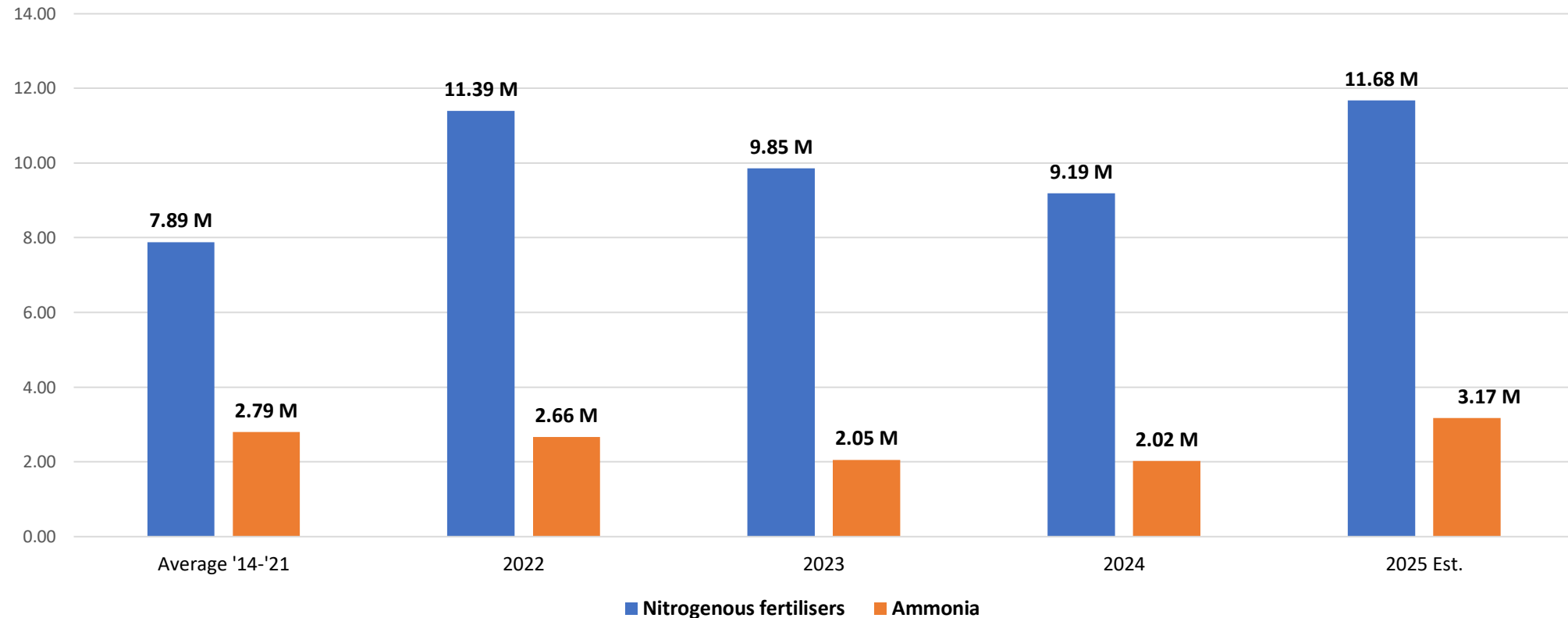
% of total N	2014-2021	2022	2023	2024	2025 Jan-Apr
Urea	55%	62%	65%	65%	67%
UAN	18%	18%	14%	14%	8%
AN	15%	9%	10%	10%	13%
Others	11%	11%	11%	10%	12%

Source: Eurostat, Comext – elaborated by DG AGRI [Agri-food data portal](#) [Fertiliser trade](#)



What factors are contributing to the reduced proportion of UAN in the overall nitrogen fertiliser imports?

Yearly N-fertilisers and ammonia import trends



Source: Eurostat, 2025 estimation based on Comext until February, Taxud Surveillance System for March and April

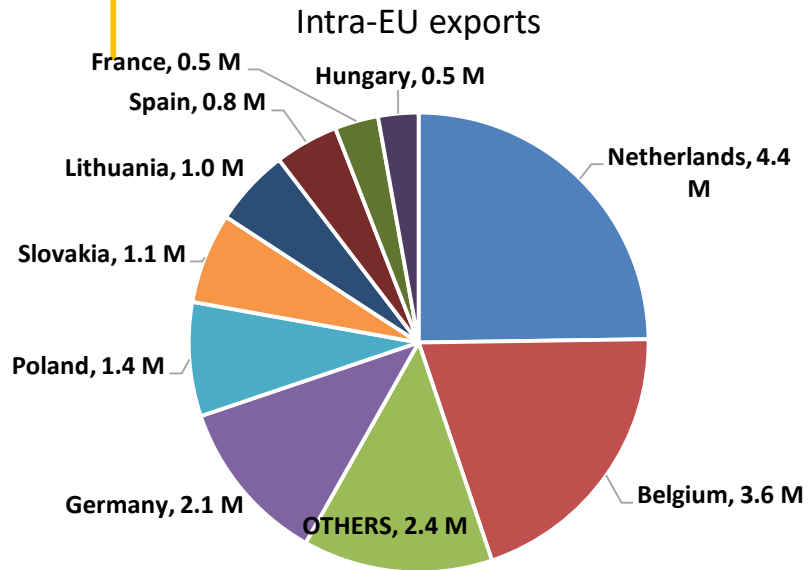
[Agri-food data portal](#) [Fertiliser trade](#)



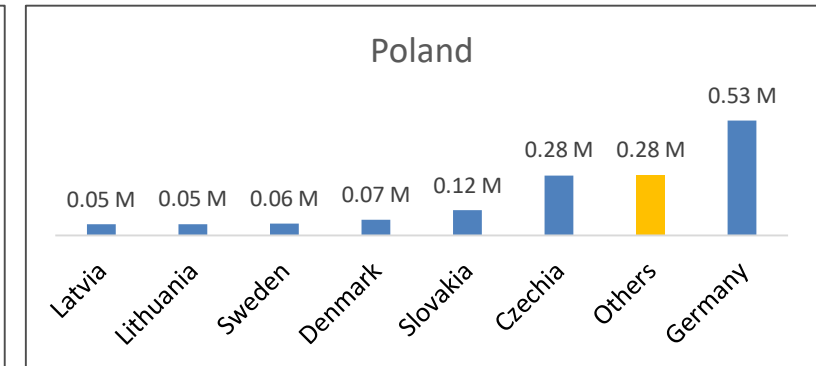
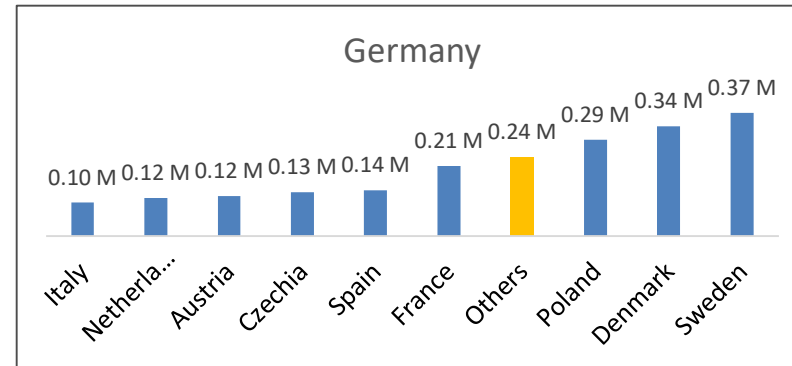
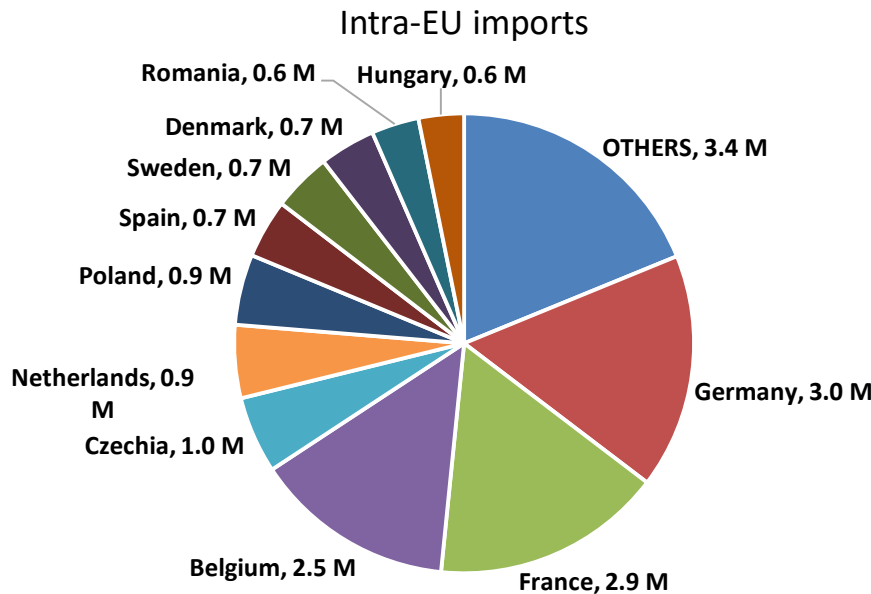
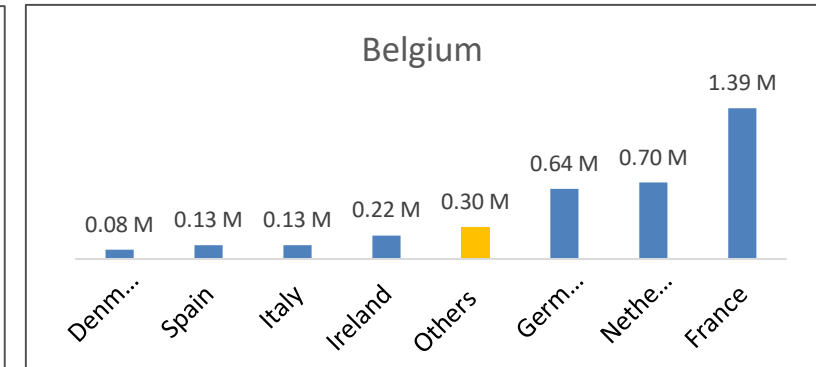
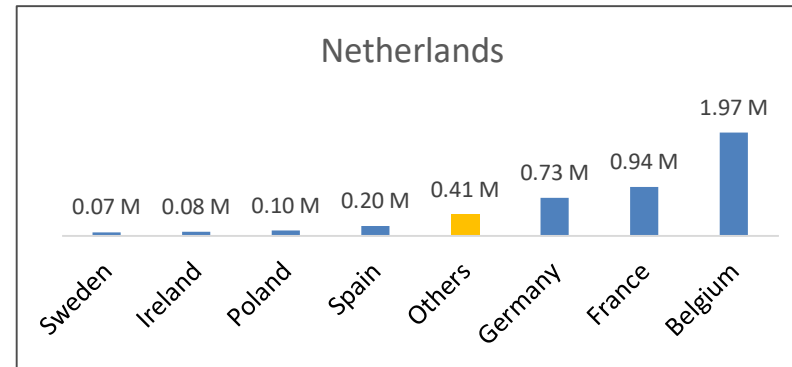
What factors do you believe are driving the increased forecasts for ammonia imports, and how might this affect the fertiliser supply chain?

Intra EU trade – N fertilisers

2024



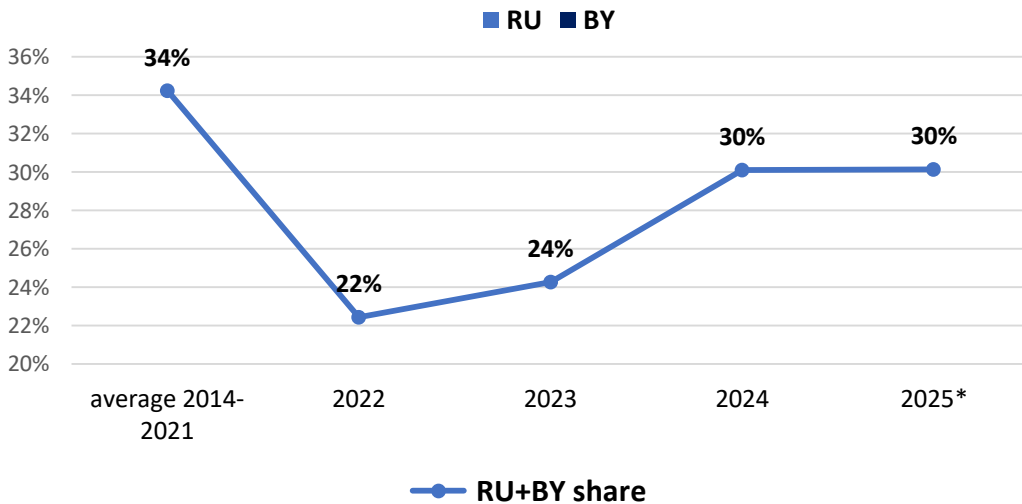
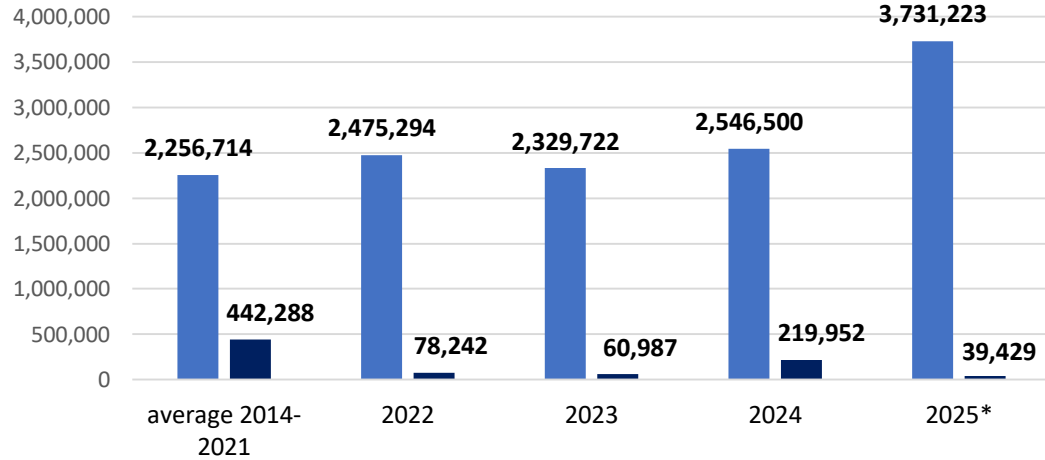
Main Intra-EU exporting MS and their key destinations.



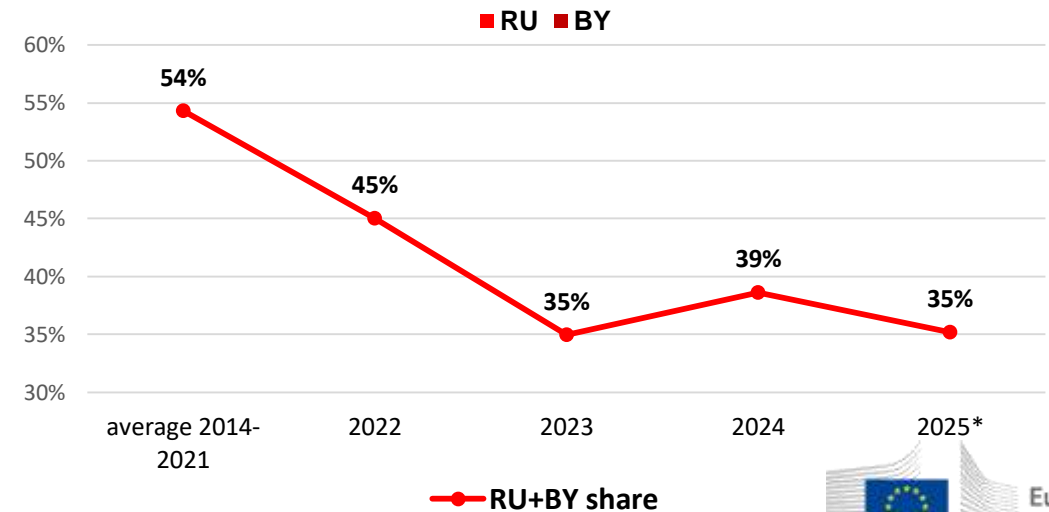
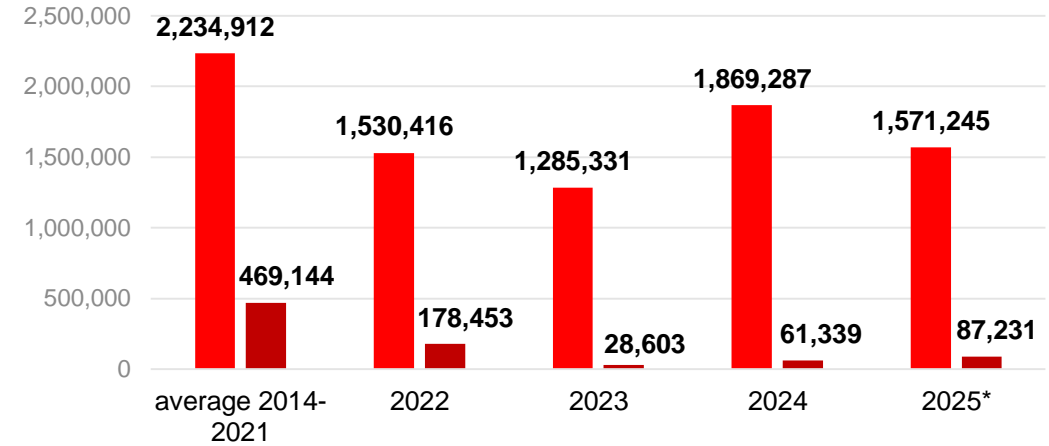
Fertilisers imports from Russia and Belarus

tonnes & share

N-fertilisers



Mixed fertilisers



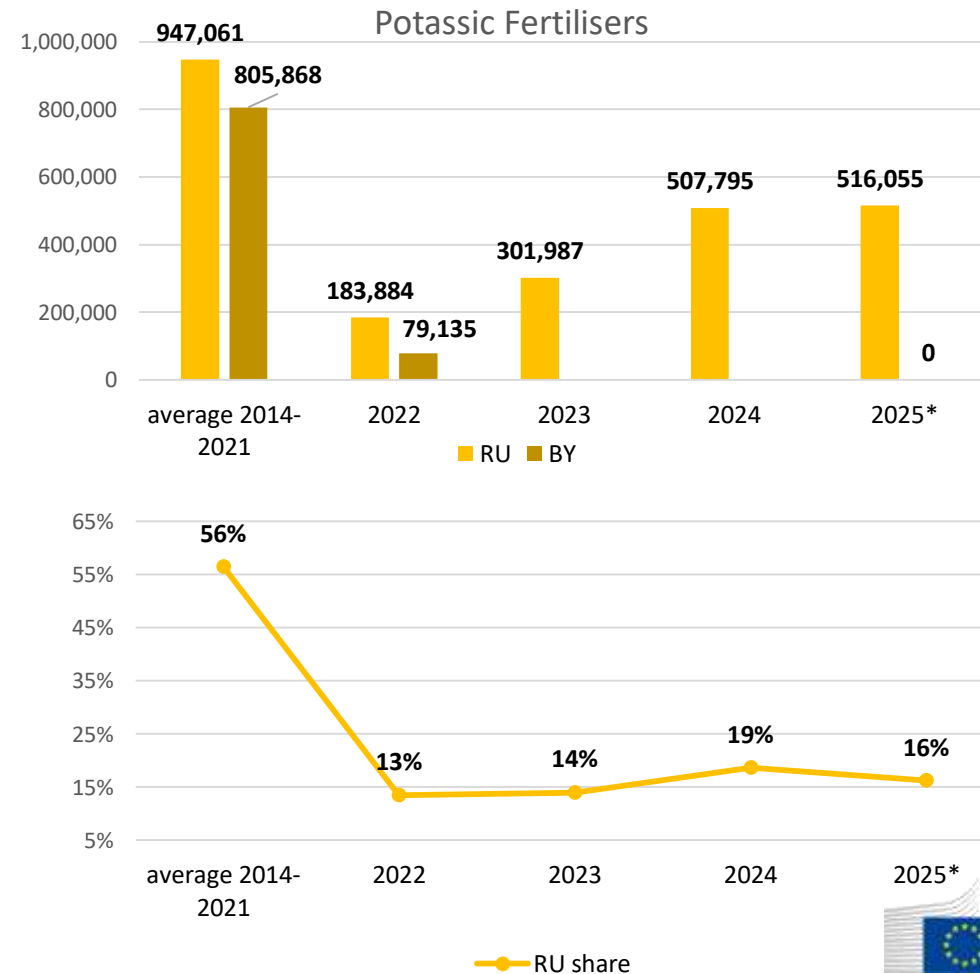
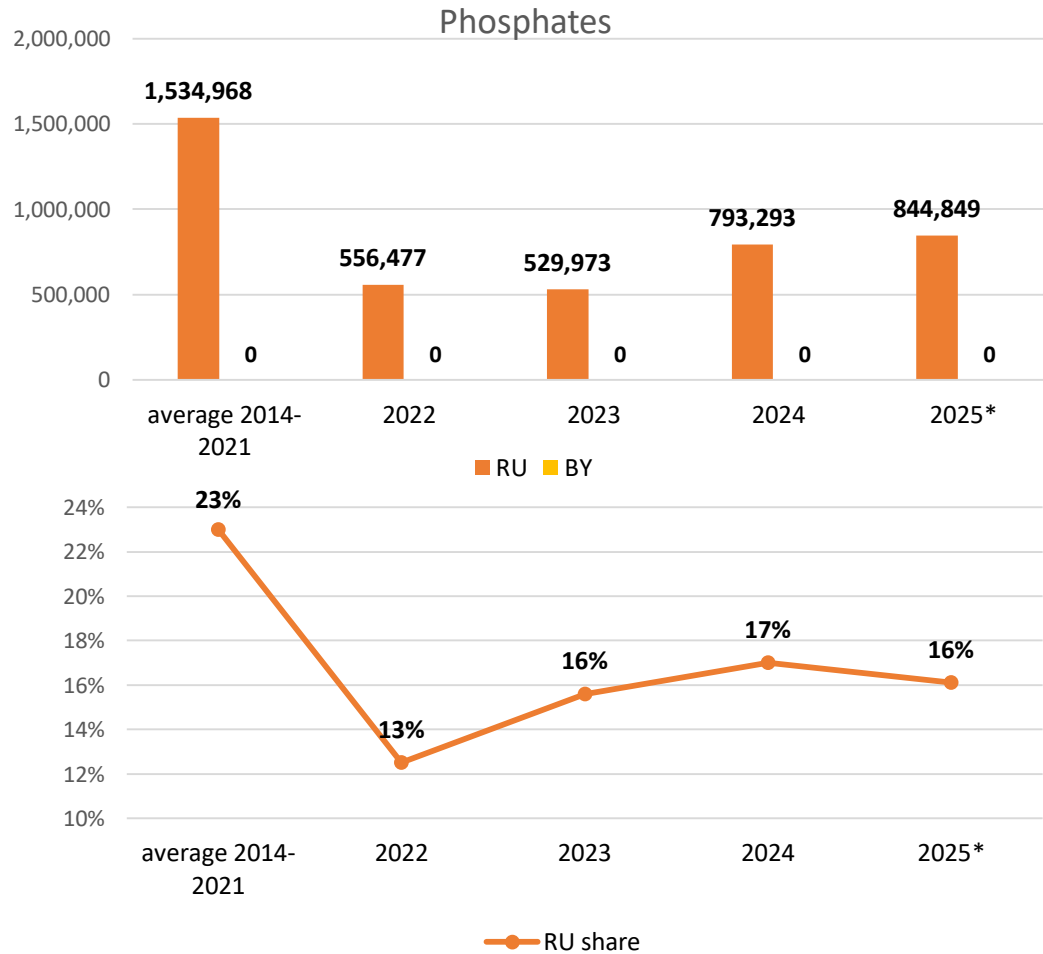
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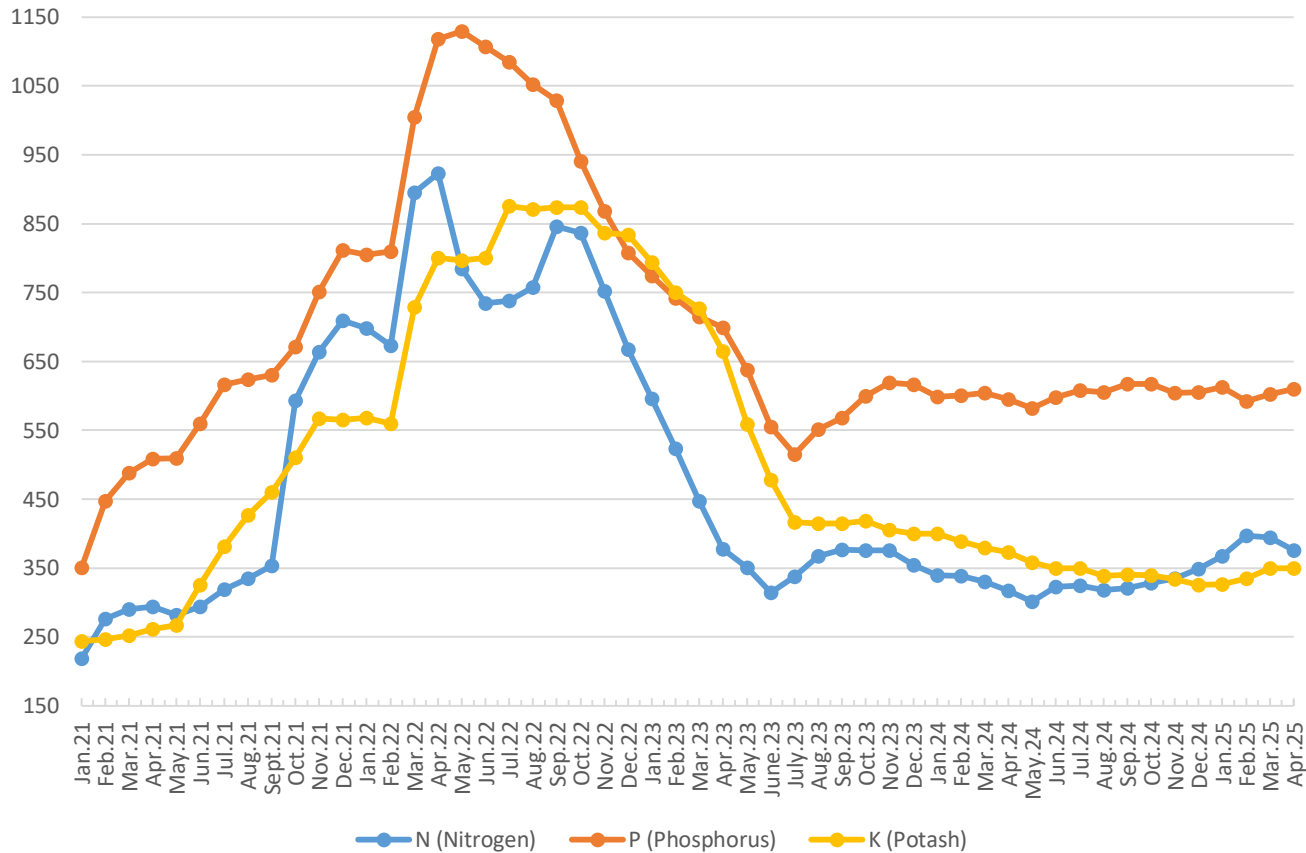
March 2022:
the EU imposed a full ban on
potash imports from BY.



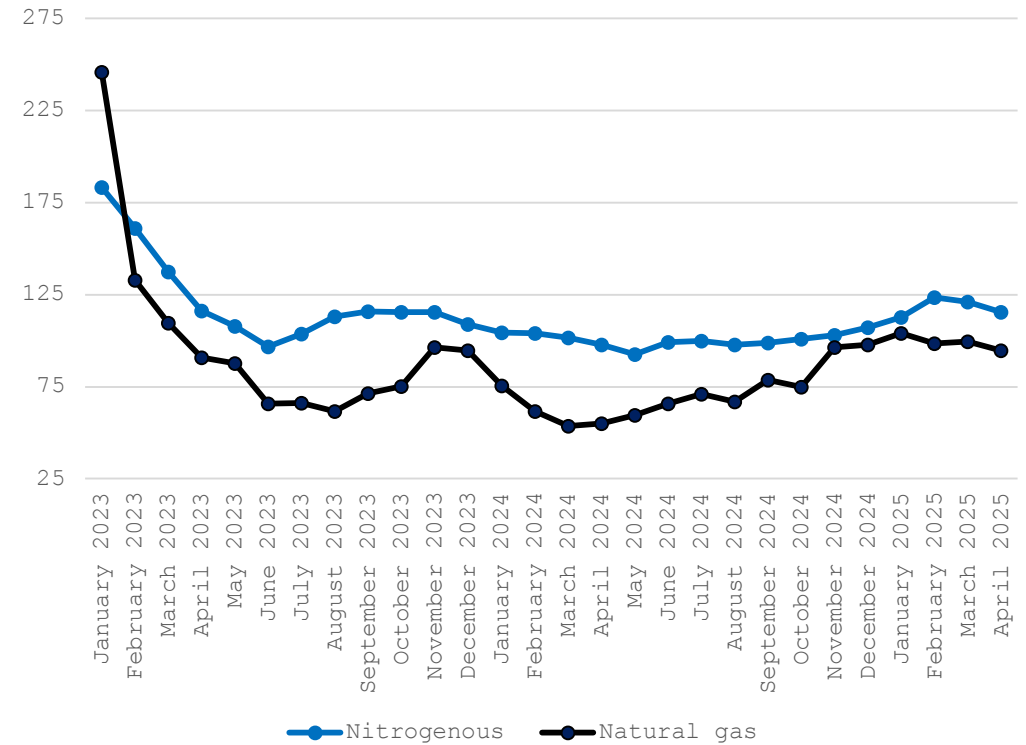
April 2022:
the EU introduced an import
quota of 2,4M tonnes on imports
of **potash fertilisers** from RU



EU average fertiliser prices by nutrient trends



Nitrogenous fertilisers and natural gas price index (2021=100)



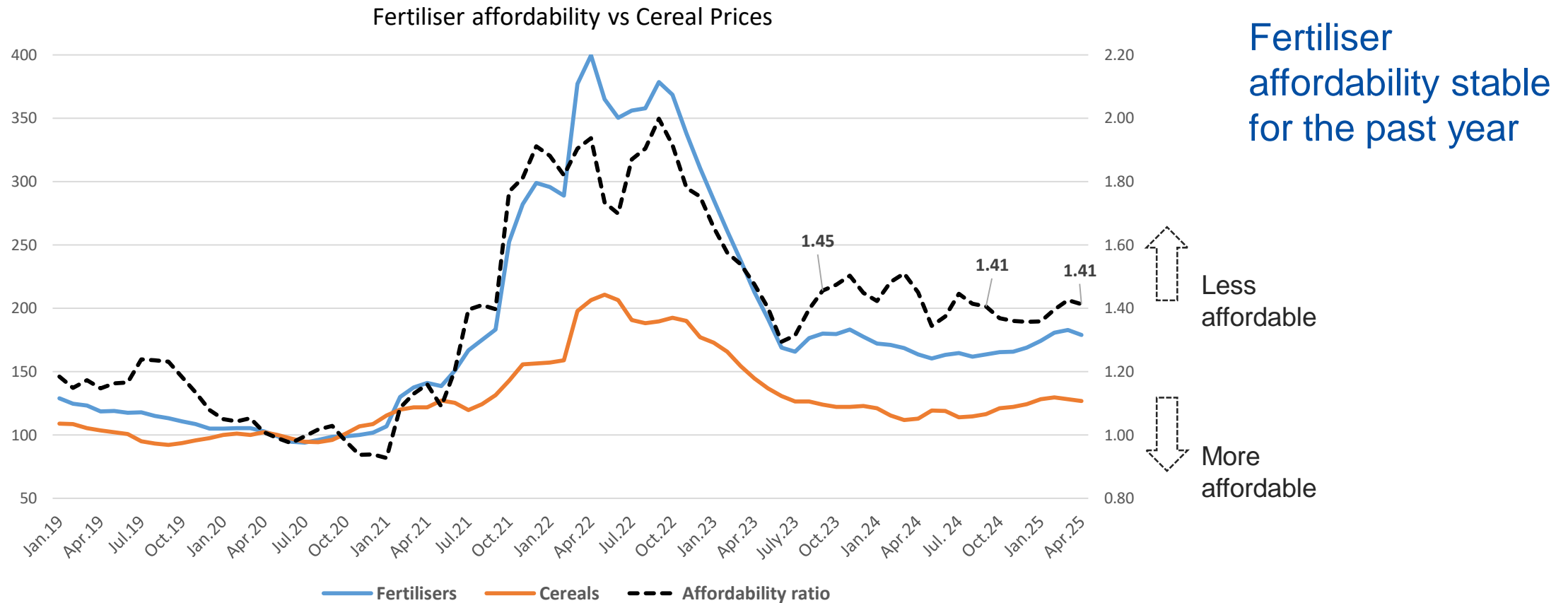
Source: [Agri-food data portal- fertiliser prices](#)

Source: [Dutch TTF Natural Gas Futures Pricing](#) and [Agri-food data portal- fertiliser prices](#) elaborated by DG AGRI



Could you provide insight into the usual contract durations between fertiliser producers and gas suppliers, and whether there has been a recent shift in preferred timeframes?

Fertiliser affordability to cereal prices



Thank you