



EU Fertiliser Market analysis

31 March 2026

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

EU Fertilisers market analysis

- Timeline
- Production index - Nitrogen
- Imports and exposure to Middle East and Russia
- Short-term impacts on EU market

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

Mineral 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 fertiliser 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 \(europa.eu\)](#)

EU fertiliser market - Timeline

2021-22
Energy Crisis

- Gas prices surge → fertiliser shock
- Sanctions + supply disruptions
- EU production curtailed

2023-2025
Period of recovery

- Prices stabilise but volatile
- Gas supply shifts away from Russia
- Partial production recovery

2025
Regulatory changes

- New EU duties on Russian fertilisers
- First supply shocks from Middle East
- CBAM, AD duties

2026
So far...

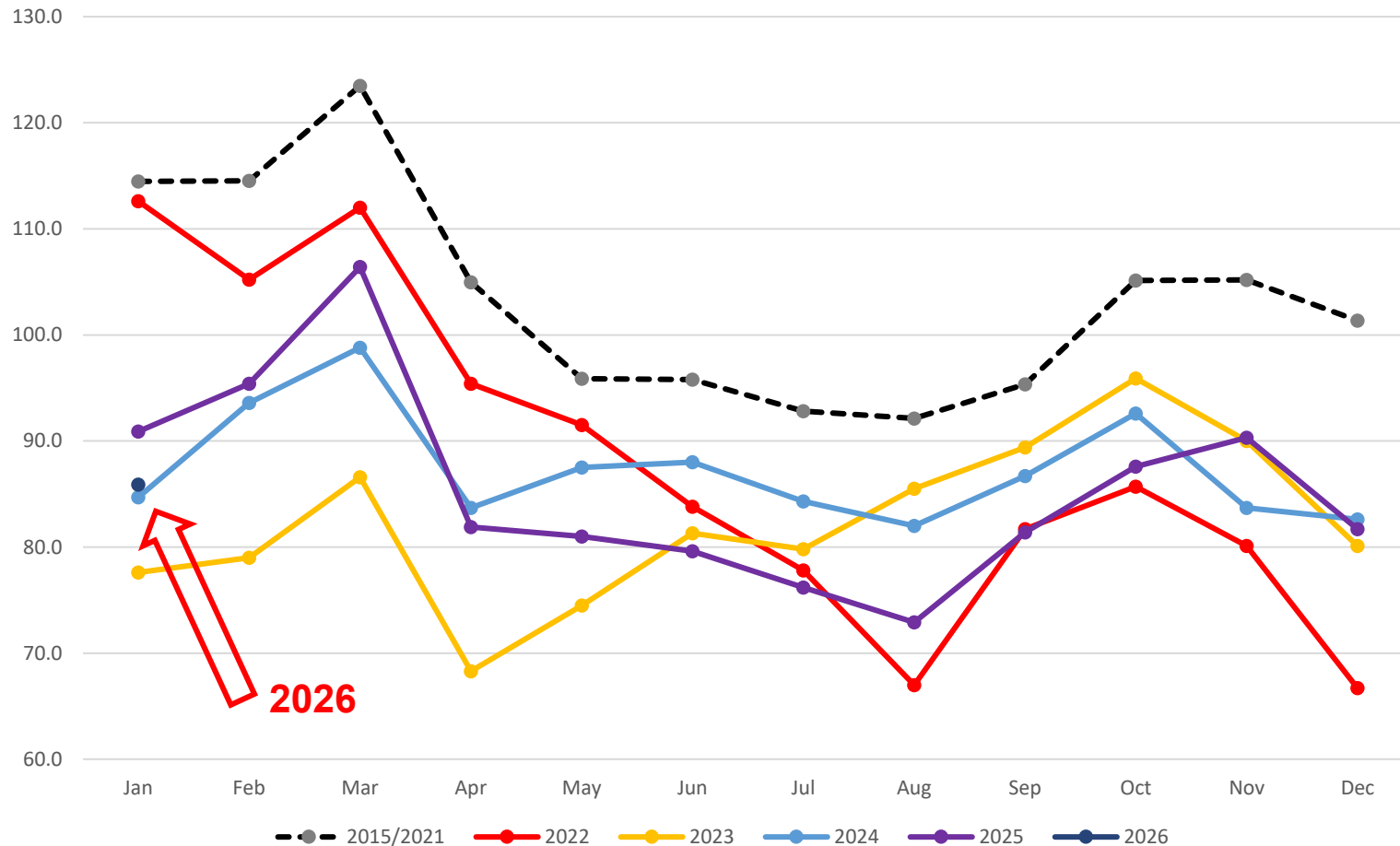
- Middle East conflict escalation
- Gas prices spike
- Continued fertiliser price increases

Production of fertilisers

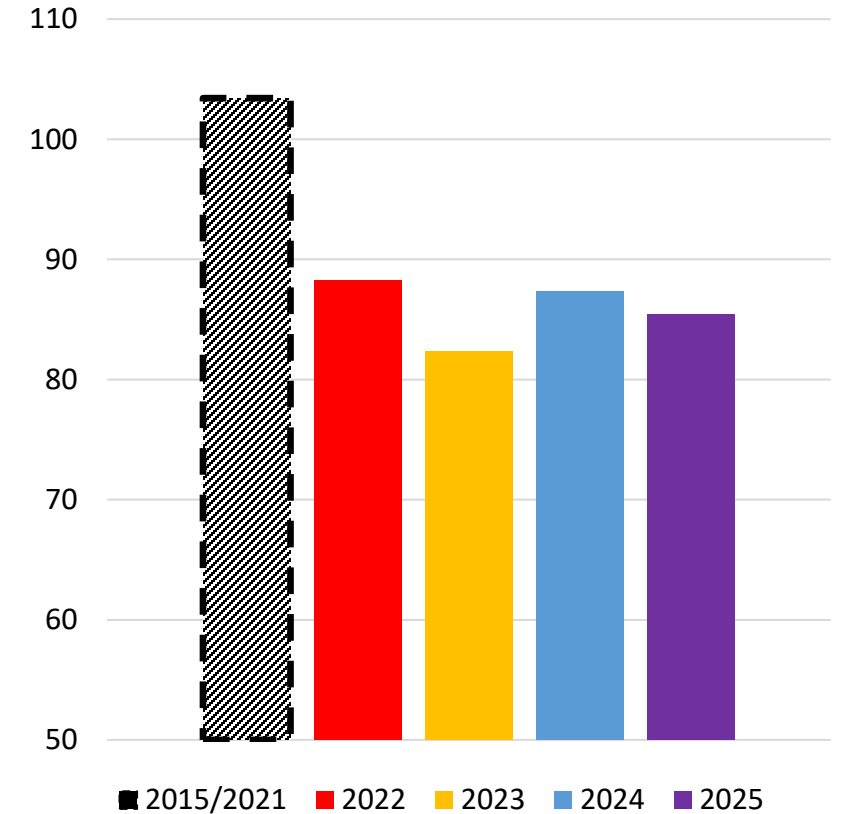
Monthly index of manufacture of fertilisers and nitrogen compounds (EU-20)

2021 = 100

Fertilisers and nitrogen compound Euro area production index (2021=100)



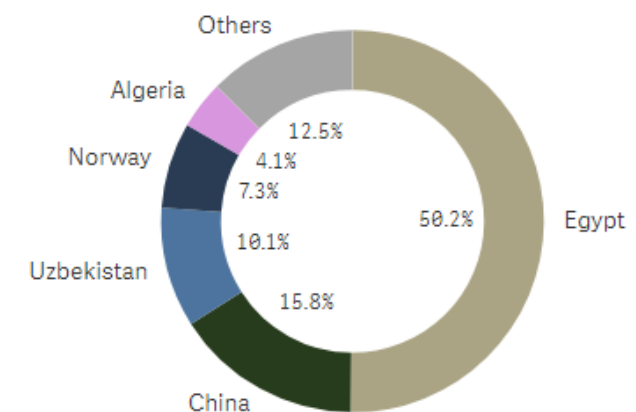
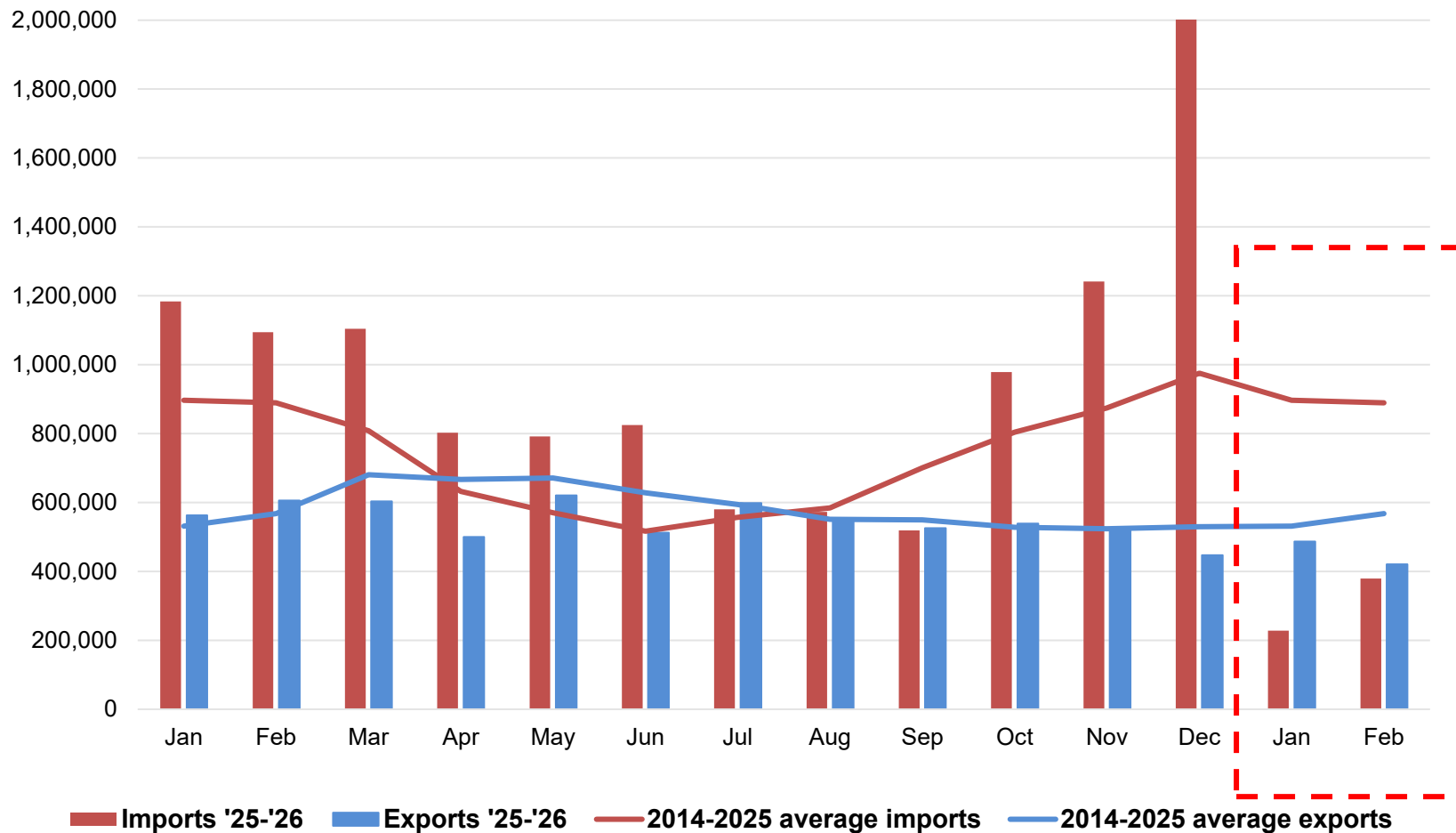
Euro Area production index - Yearly average



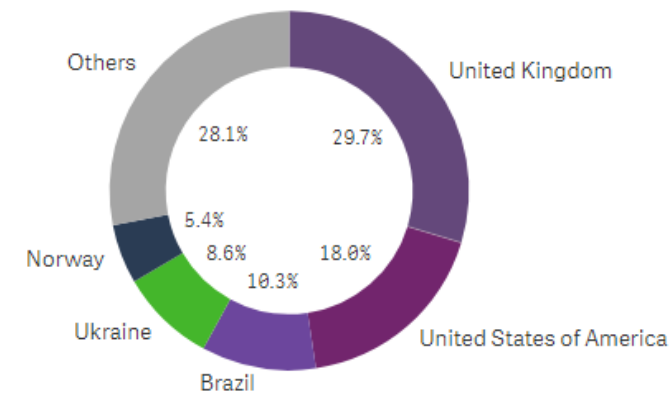
Source: Eurostat, short-term business statistics for production in industry (sts_inpr_m)

EU Nitrogen fertilisers imports

tonnes



- **2026 Imports:** 0.6 mil. tonnes (66% below average)

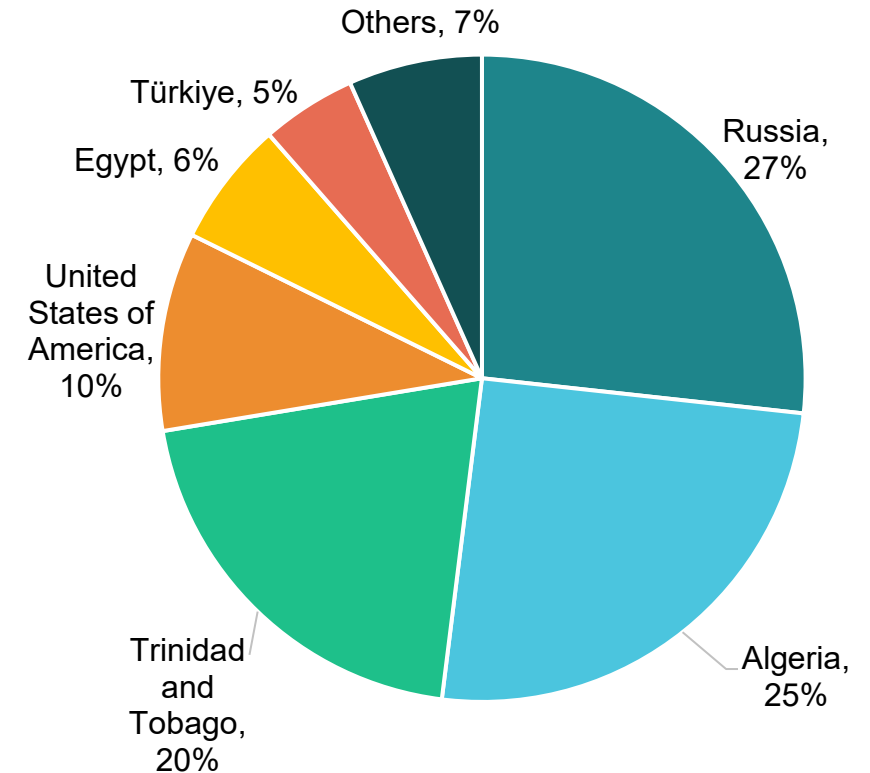
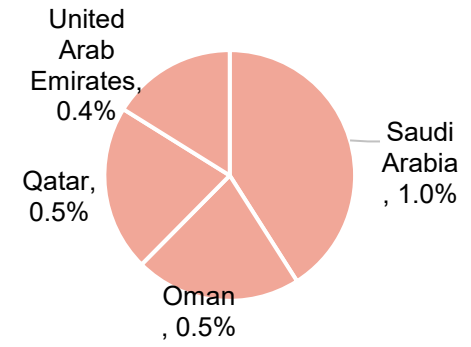
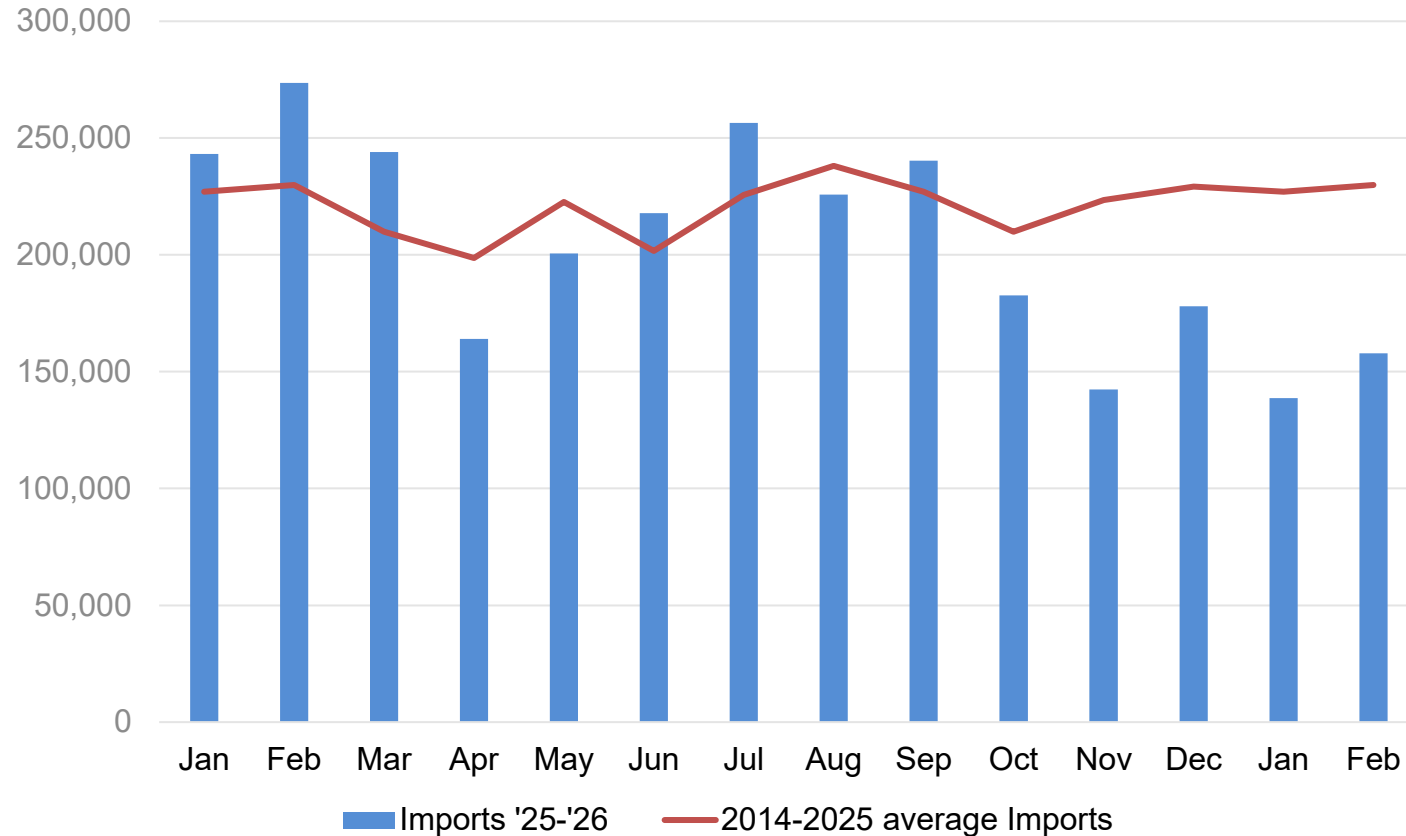


- **2026 Exports:** 0.5 mil. tonnes (17% below average)



EU Ammonia imports

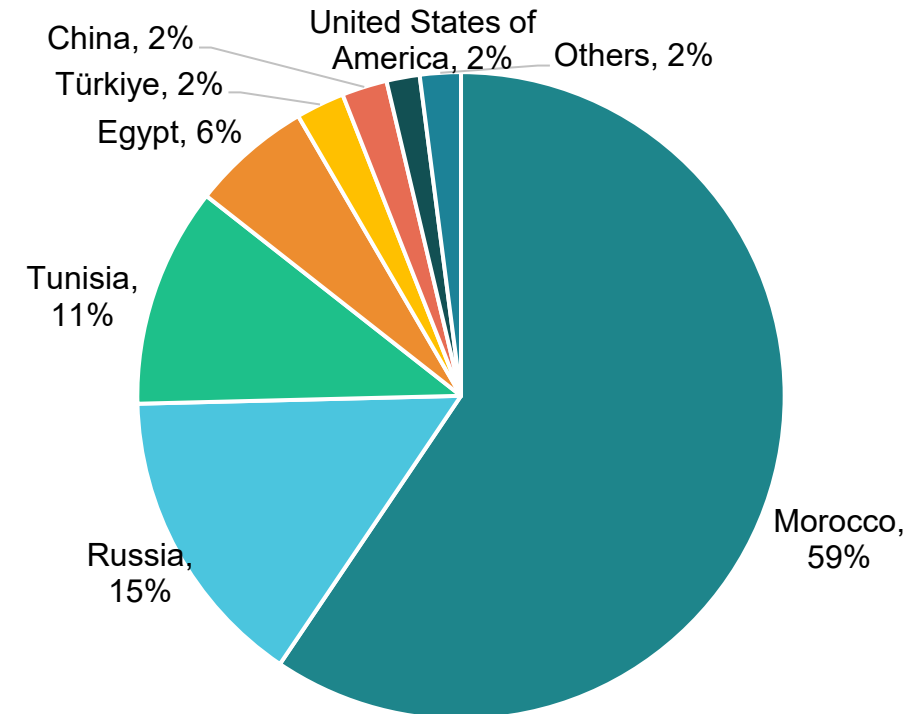
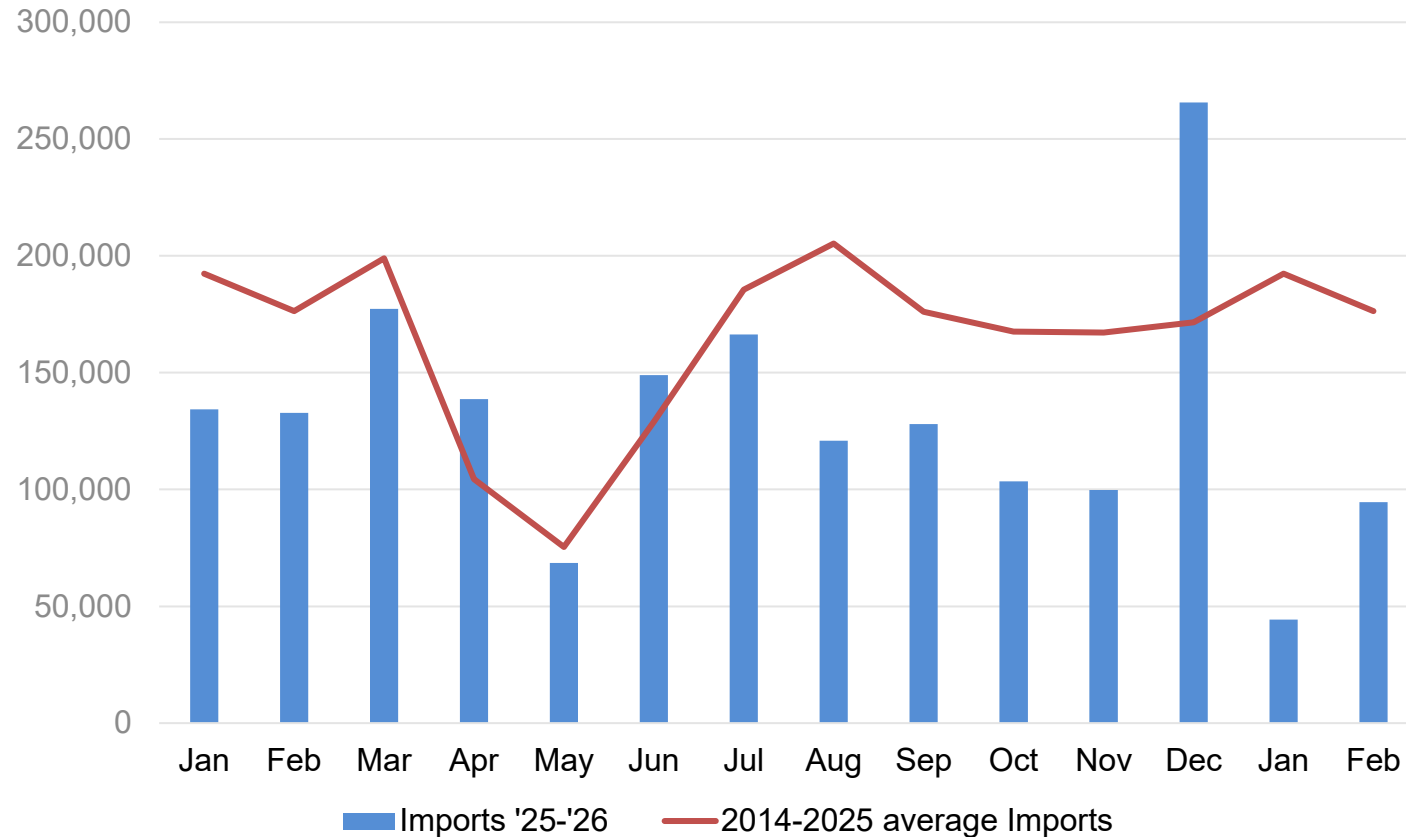
(tonnes and share in 2025-2026)



- **Middle East: <1%**
- Little imports from Middle East countries, but there are concerns regarding supplies from Morocco, as it relies on Gulf countries for feedstocks.

EU DAP/MAP imports

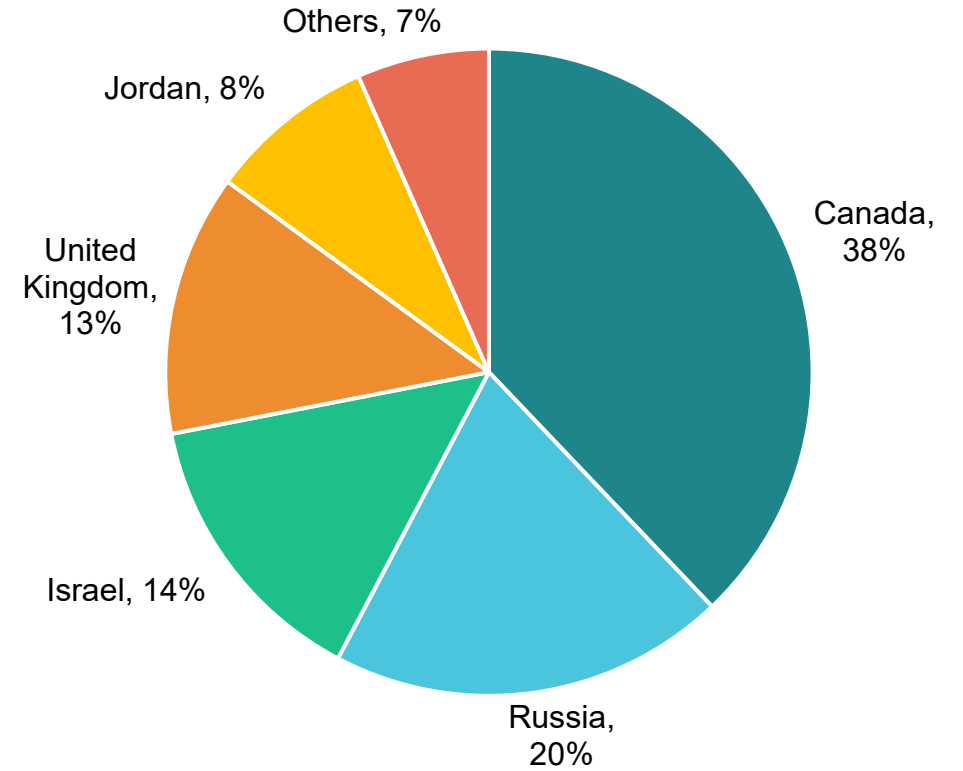
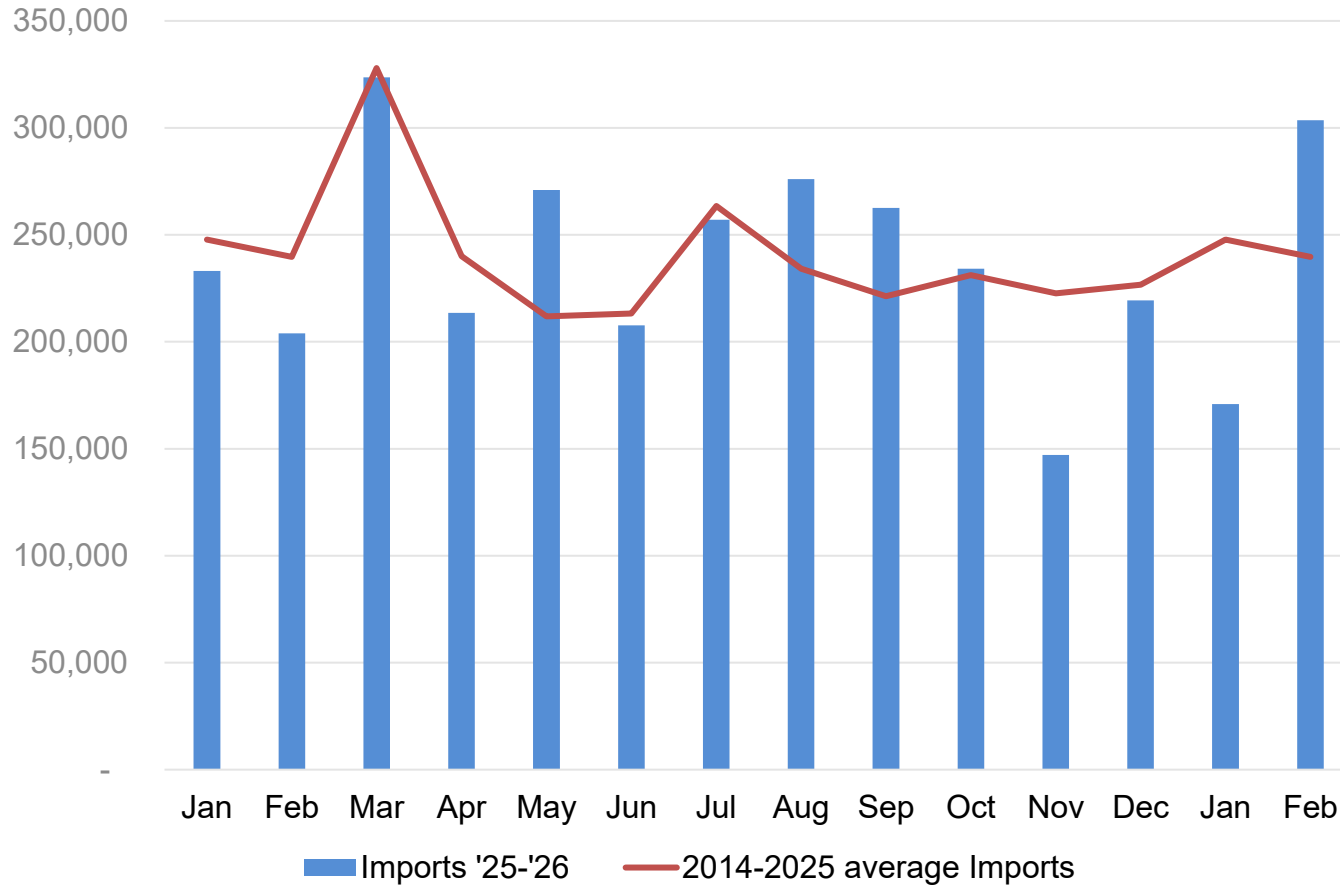
(tonnes and share in 2025-2026)



- **Middle East: <1%**
- Little imports from Middle East countries, but there are concerns regarding supplies from Morocco, as it relies on Gulf countries for feedstocks.

EU Potassic fertiliser imports

(tonnes and *share 2025-2026*)

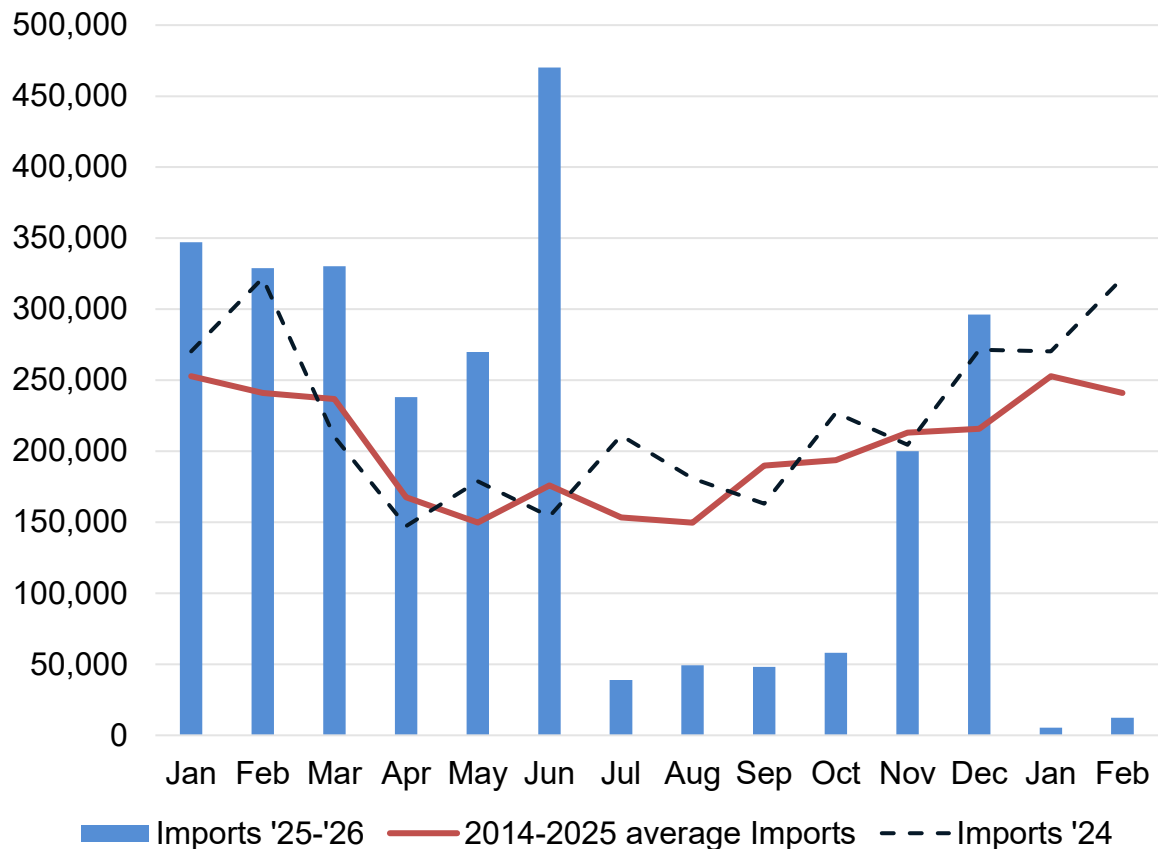


- **Middle East: 20.4%**
- Little imports from Gulf countries. Imports share from Israel and Jordan significantly increased in the latest years (post Belarus ban), but little cause for concern as global production forecast is positive

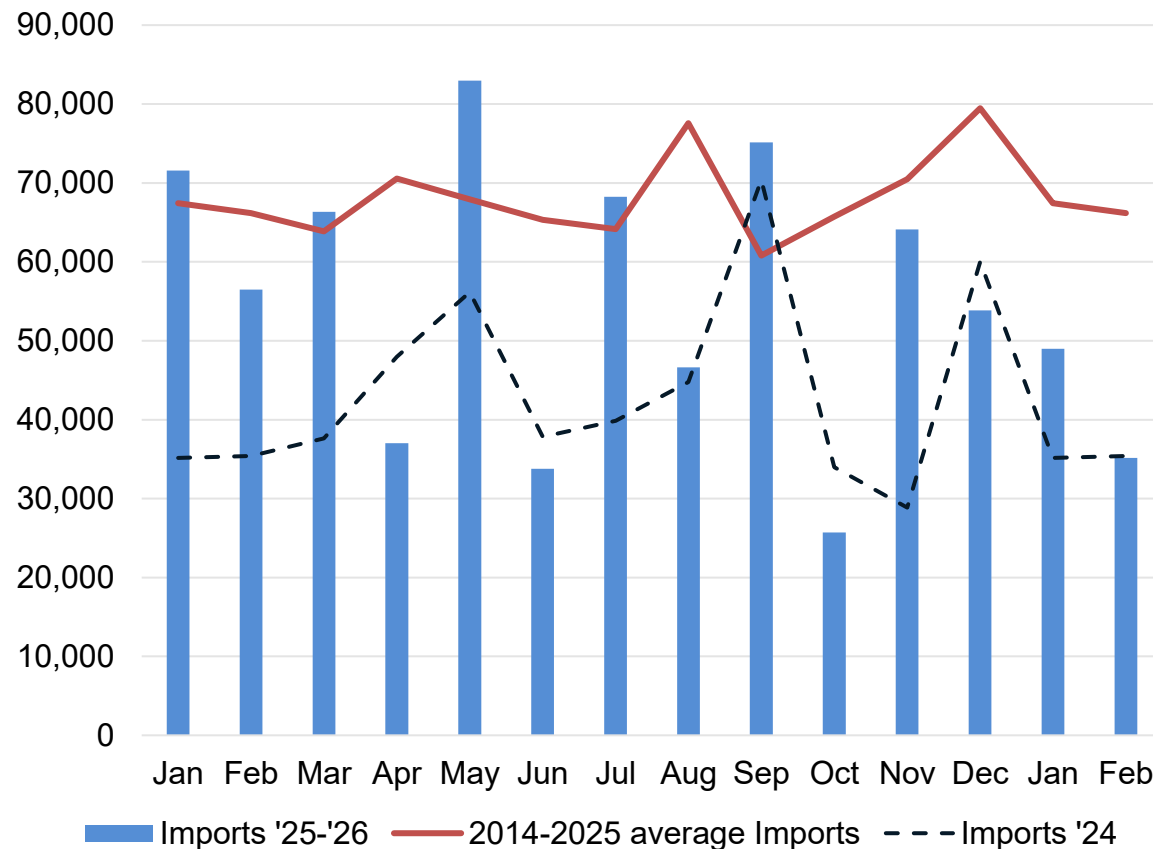
Fertilisers imports from Russia

tonnes

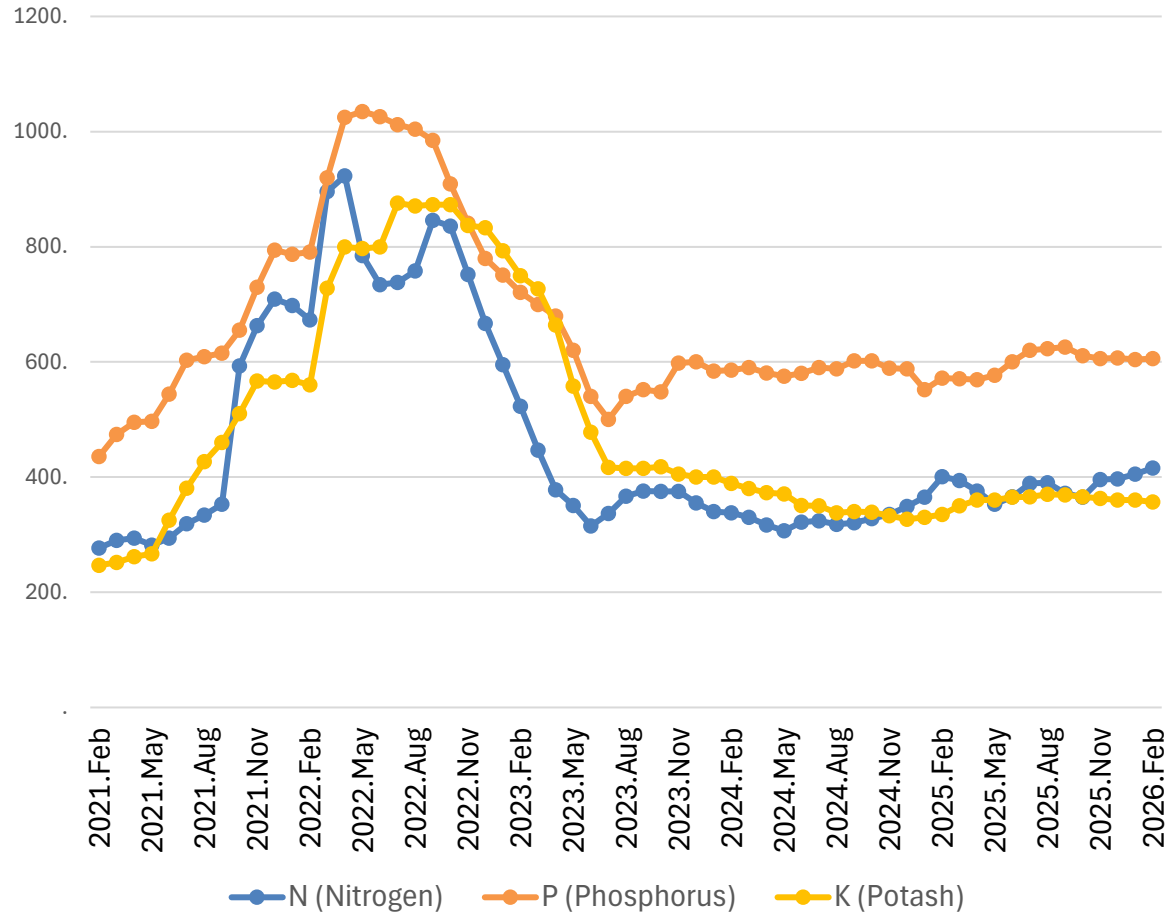
Nitrogen fertilisers



Ammonia



'26 EU fertiliser market



Price increases in first 4 weeks of March €/tonne (% compared to end of February)

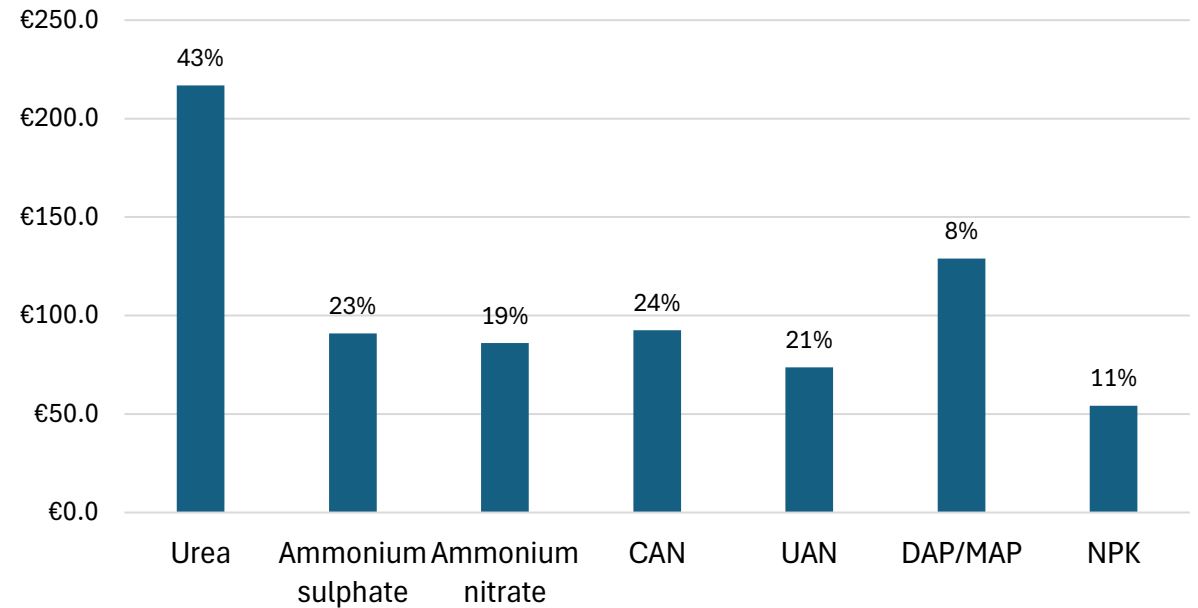


Table: Evolution of average fertiliser prices – First 4 weeks of March, based on reports of S&P Global and Argus Media for spot prices in major EU ports

Thank you