



**Fertilisers market observatory**

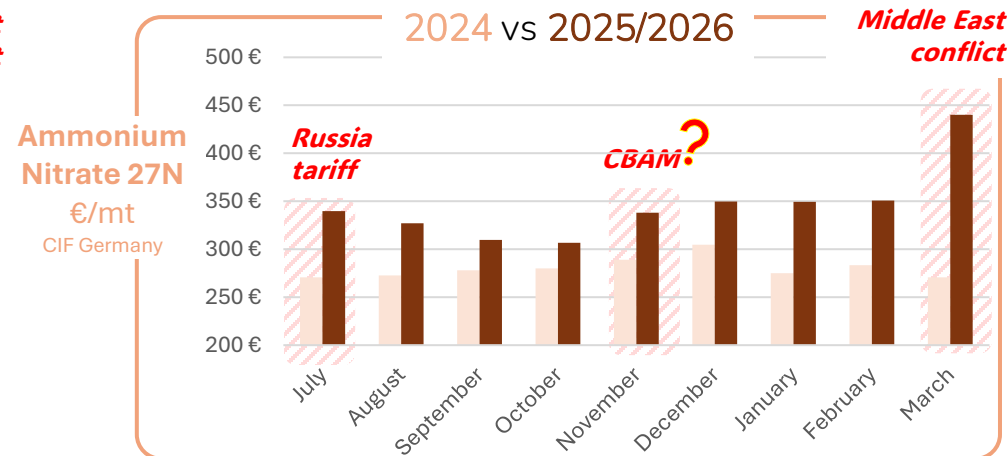
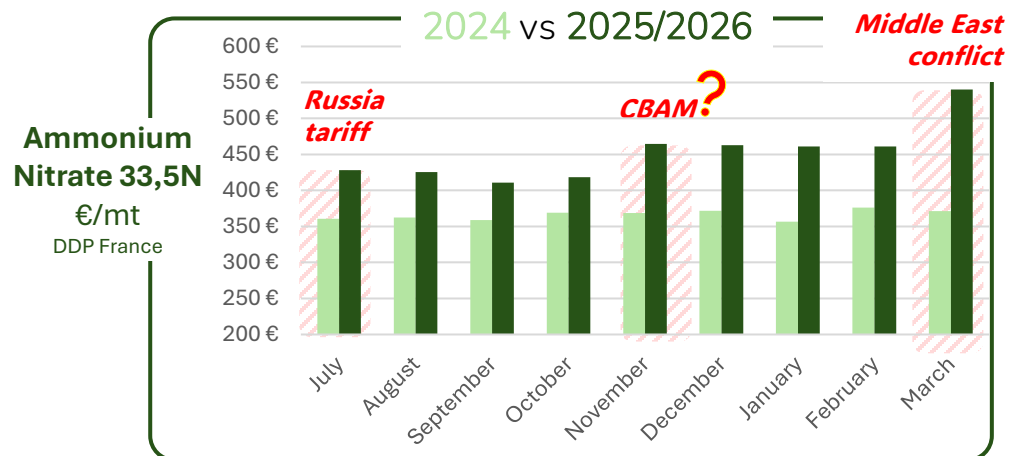
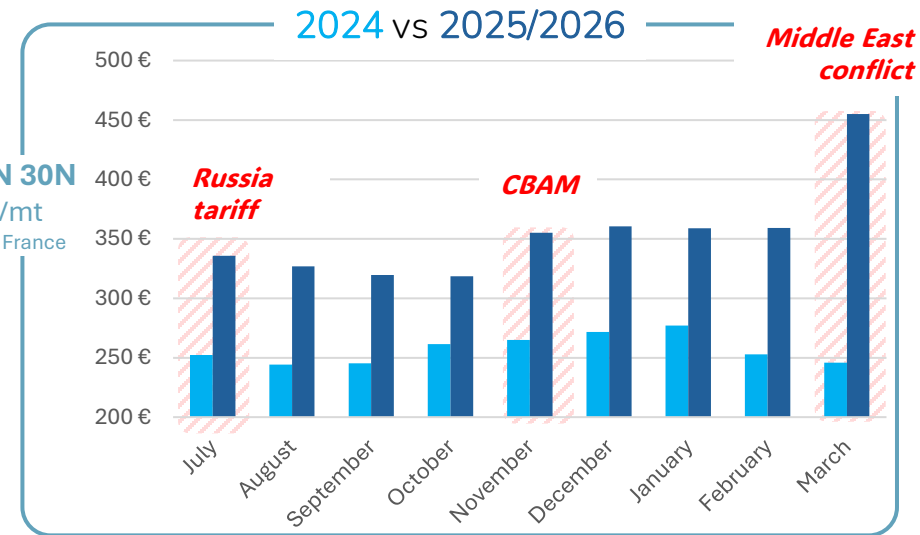
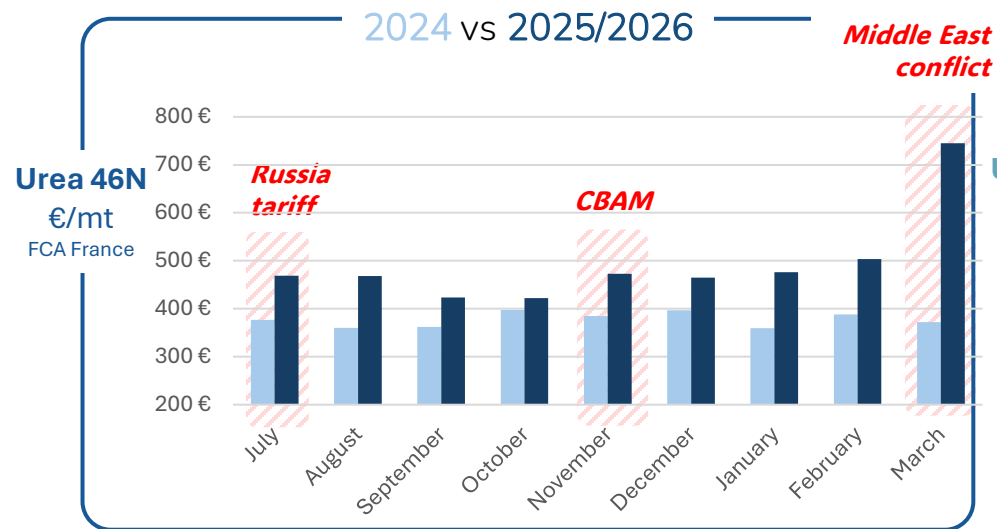
***MONITORING PRICES***  
*STRAIGHT NITROGEN FERTILISERS*



**31 March 2026**



# Are the price levels of the four main nitrogen fertilisers substantially exceed the 2024 price levels? Prices observed by distributors members of AFCOME on the European market



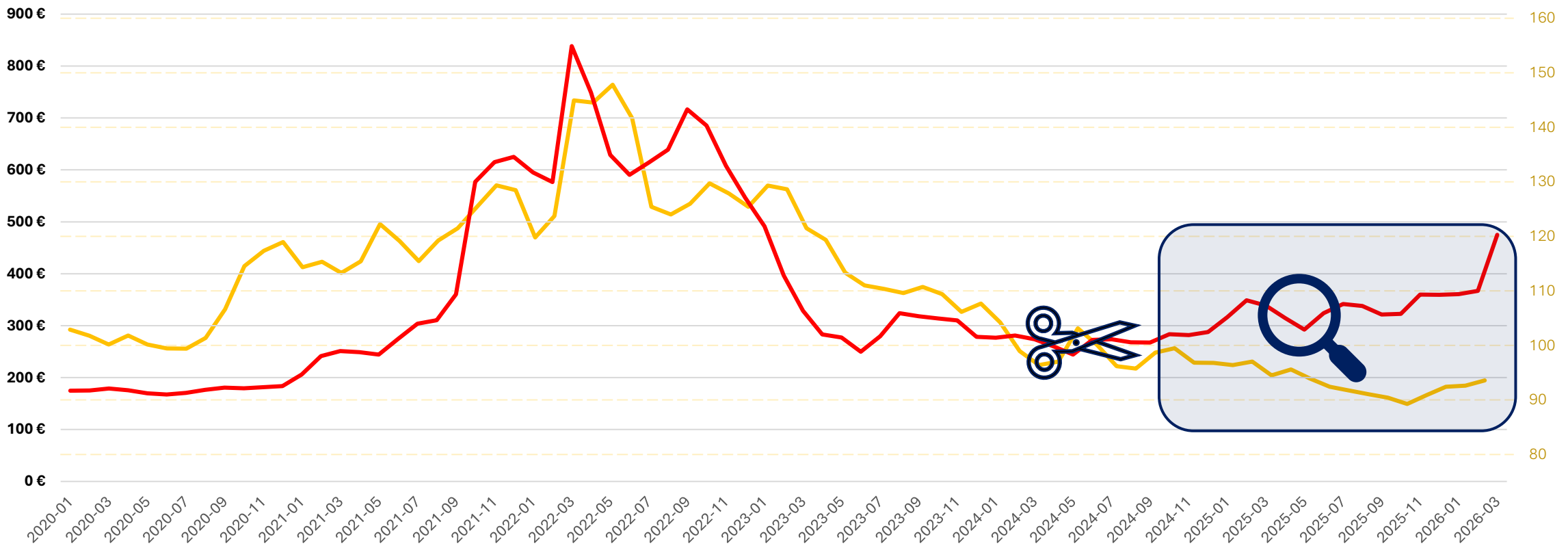
**Since January, the average basket price of nitrogen fertilisers has been 45% higher than in 2024!**

Comparison with cereal prices >>>



## Average basket price of nitrogen fertilisers

Comparison with cereal prices >>>

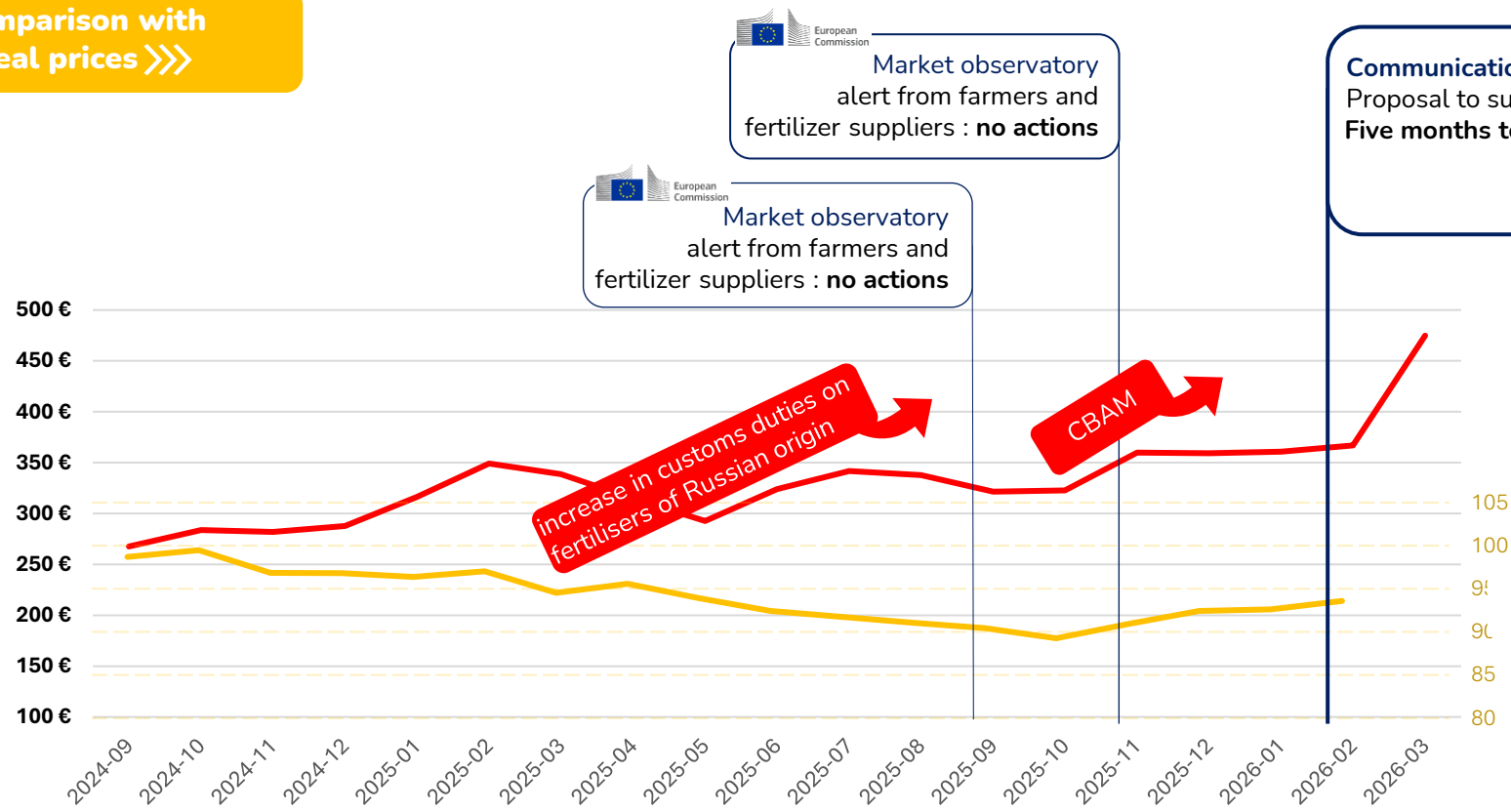


— Average price of a nitrogen fertiliser containing 30 units of nitrogen based on the average prices for 46N urea (1/3), 30N UAN (1/3) and 33.5N AN (1/3), as reported by AFCOME members  
— FAO Cereal Price Index real



## Average basket price of nitrogen fertilisers

Comparison with cereal prices >>>



European Commission  
Market observatory alert from farmers and fertilizer suppliers : **no actions**

European Commission  
Market observatory alert from farmers and fertilizer suppliers : **no actions**

European Commission  
**Communication of Commission**  
Proposal to suspend customs duties for one year  
**Five months to get a share that still hasn't been published**

EUROPEAN COMMISSION

Brussels, 20.2.2026  
COM(2026) 99 final  
2026/0062 (NLE)

Proposal for a  
**COUNCIL REGULATION**  
suspending the Common Customs Tariff duties referred to in Article 56(2), point (c), of Regulation (EU) No 952/2013 of the European Parliament and of the Council, opening and providing for the management of autonomous tariff rate quotas for certain fertilisers

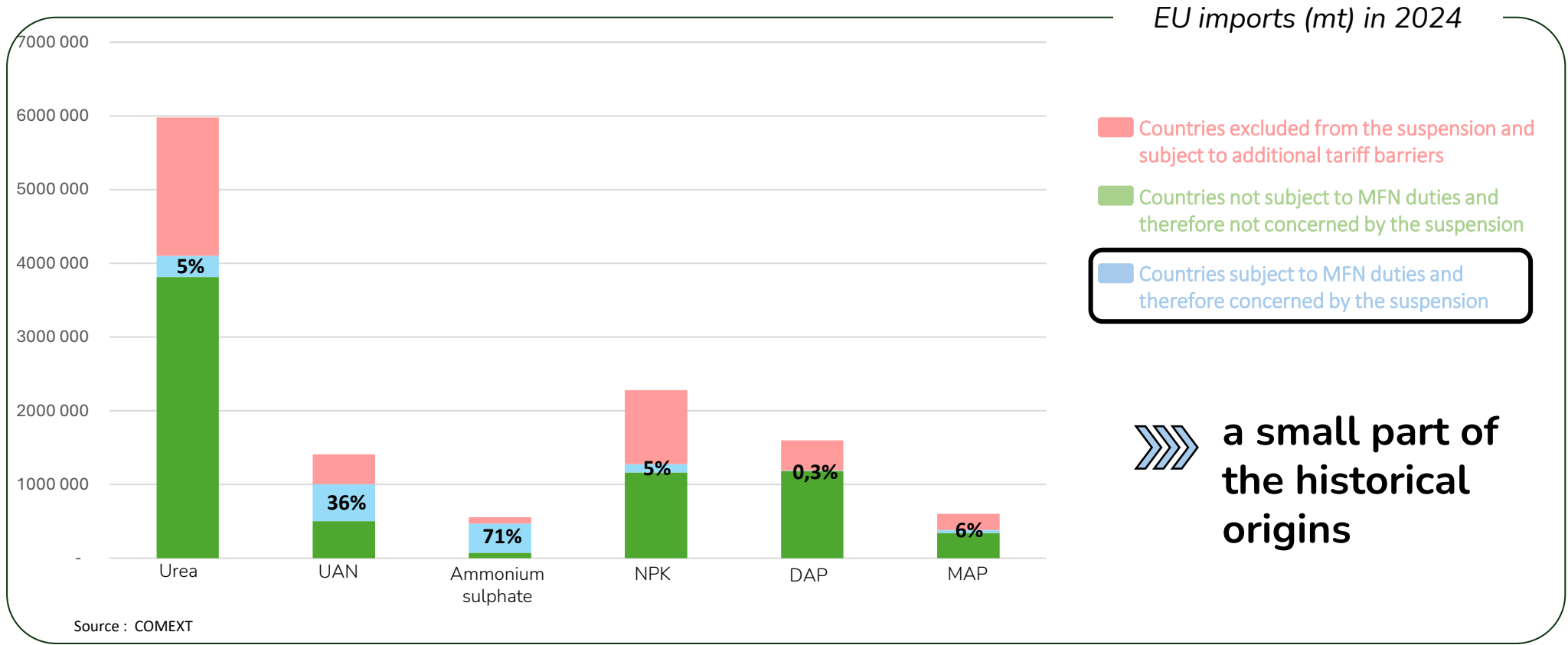
**Sometimes is to slow, for sure!**  
But what does this proposal actually involve? >>>

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## Proposal to suspend customs duties for one year

### Which origins are concerned?

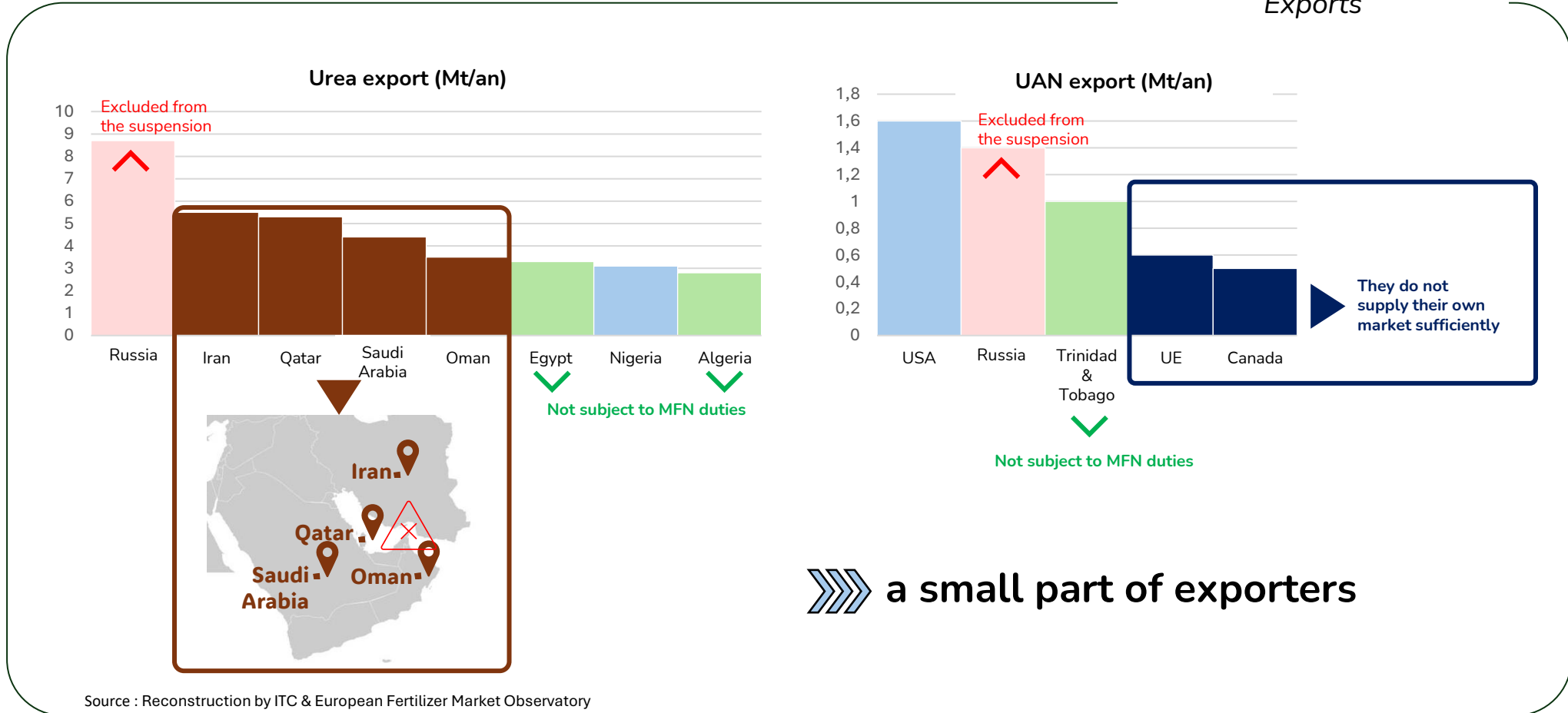




# Proposal to suspend customs duties for one year

## Other potential new origins?

➔ Example on the two main straight nitrogen fertilisers

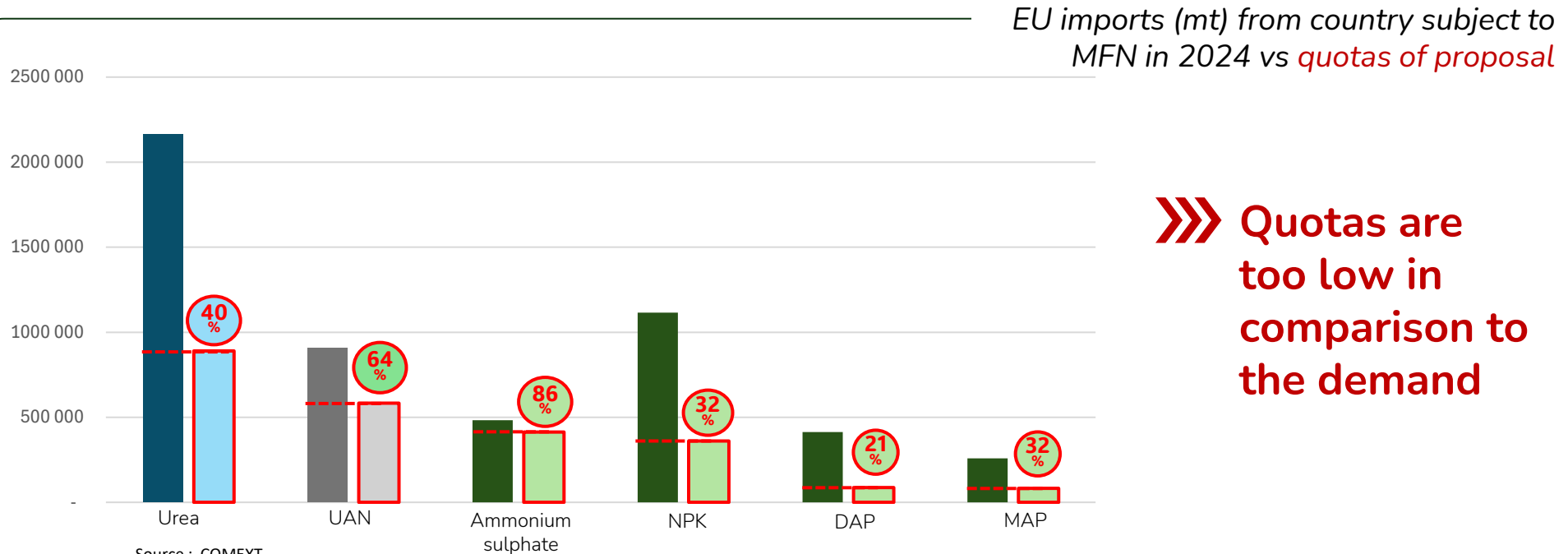


➔ a small part of exporters



## Proposal to suspend customs duties for one year Increase in offer bring prices down ?

➔ the suspension is subject to quotas



➔➔➔ Quotas are too low in comparison to the demand

Source : COMEXT

The proposal specifies that quotas corresponds to the volume of 2024 imports from countries subject to MFN duties except imports from Russia and Belarus but increased by a top-up of 20% of the volumes imported into the Union from these two countries in 2024....so 80% reduction in volumes originating from these two countries

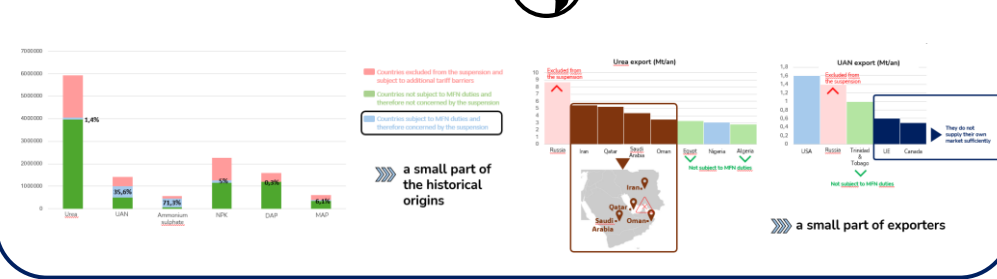
**Why? Does this legitimate geopolitical ambition have anything to do with a fall in consumption?**

**It is legitimate to reduce the volumes coming from these two countries, but why translate this into a fall in consumption within the quotas?**



## Proposal to suspend customs duties for one year A good initiative, but unfortunately one with little impact

A lack of alternative sources



Limited volumes

5.5t



A one-year time limit that prevents the development of logistics chains



# Minimal impact on competitiveness and therefore on prices