INDUSTRY FACTS AND FIGURES 2018
THE EUROPEAN FERTILIZER INDUSTRY

€10.9 BN* turnover
€1.3 BN* investment
78,500* employees
120+ production sites
€66.2M R&D 2015 (members only)

* average last 5 years

FERTILIZERS AND FOOD SECURITY

Fertilizers are an integral part of food production. Without them, 50% of the world would go hungry.

Today, fertilizers account for 50% of global food production.

In 1960, 2 people were fed from 1 hectare of land.
In 2025, 5 people will need to be fed from 1 hectare of land.

All figures presented throughout this brochure refer to the mineral fertilizer industry unless specified otherwise.

PRODUCTION OF MAIN FERTILIZER PRODUCTS

Raw materials
- Air (N₂)
- Natural gas

Intermediate products
- Ammonia
- Nitric acid
- Carbon dioxide

Mineral fertilizers
- Ammonium nitrate (AN)
- Urea
- UAN
- Single superphosphate (SSP)
- Mono- and diammonium phosphate (MAP/DAP)
- Triple superphosphate (TSP)

Phosphate rock
- Phosphate concentrate
- Sulphuric acid
- Phosphoric acid
- Ammonia

Phosphoric acid
- Single superphosphate (SSP)
- Mono- and diammonium phosphate (MAP/DAP)
- Triple superphosphate (TSP)

Potash rock
- Potash concentrate
- Potassium chloride solution
- Nitric acid
- Sulphuric acid

Potassium chloride solution
- Muriate of potash (MOP)
- Potassium nitrate (KN)
- Sulphate of potash (SOP)
FERTILIZER PRODUCTION BY NUTRIENT

The EU produces 8% of global nitrogen, 3% of global phosphate and 7% of global potash.

Europe 16.6 M tonnes

Global 242.1 M tonnes

Source: Fertilizers Europe/IFA

FERTILIZER IMPORTS AND EXPORTS IN THE EU

EU imports (million tonnes)

EU exports (million tonnes)

Source: Fertilizers Europe/Eurostat

* Includes products for agricultural and industrial use
EU KEY PARTNERS IN FERTILIZER TRADE*

*Finished mineral fertilizer products

Source: Fertilizers Europe/Eurostat
FERTILIZER CONSUMPTION BY CROP

26% Wheat
25% Coarse grains
11% Oilseeds
3% Potatoes
2% Sugar beet
5% Other arable crops
6% Perm. crops
6% Fodder crops
16% Fertilized grassland

Source: Fertilizers Europe

NITROGEN FERTILIZER CONSUMPTION BY PRODUCT

EUROPEAN & GLOBAL NITROGEN CONSUMPTION BY PRODUCT*

Europe 2016/17
11.8 M tonnes
45% Nitrates
23% Urea
13% UAN
13% Compound fertilizers
6% Others

Global 2015
106.5 M tonnes
50% Nitrates
18% Urea
14% UAN
18% Compound fertilizers
10% Others

* Agricultural use only

Source: Fertilizers Europe/IFA
FERTILIZER CONSUMPTION BY NUTRIENT

CONSUMPTION BY NUTRIENT

Total nutrients 16.5 M tonnes

Expected growth by 2026/2027
- Nitrogen: -0.2%
- Potash: +5.0%
- Phosphate: +6.0%

* Agricultural use only

Source: Fertilizers Europe

AGRICULTURAL LAND USE IN THE EU

178.9 million hectares including 134.5 million hectares of fertilized area

Source: Forecast of food and farming and fertilizer use in the European Union 2017-2027, Fertilizers Europe
MARKET VALUE OF FERTILIZING PRODUCTS

- **Mineral Fertilizers** - 80%
- **Organo-Mineral Fertilizers** - 2%
- **Soil Improver** - 2%
- **Plant Biostimulant** - 2%
- **Organic Fertilizers** - 5%
- **Growing Media** - 6%
- **Limiting Material** - 2%
- **Agronomic Additives** - 1%

Source: European Commission
Fertilizers Europe represents the majority of fertilizer producers in Europe and is recognised as the dedicated industry source of information on mineral fertilizers. The association communicates with a wide variety of institutions, legislators, stakeholders and members of the public who seek information on fertilizer technology and topics relating to today’s agricultural, environmental and economic challenges. The Fertilizers Europe website provides information on subjects of relevance to all those interested in fertilizers contribution to global food security.

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