



| INDUSTRY FACTS AND FIGURES 2018



THE EUROPEAN FERTILIZER INDUSTRY



€ 10.9 BN*
turnover



€ 1.3 BN*
investment



78.500*
employees



120+
production
sites



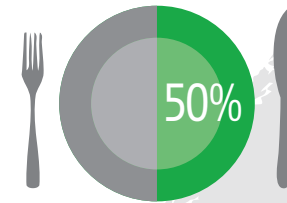
€ 66.2M
R&D 2015
(members only)

* average last 5 years

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

FERTILIZERS AND FOOD SECURITY

FERTILIZERS AND FOOD SECURITY



Today, fertilizers account
for 50%
of global food production

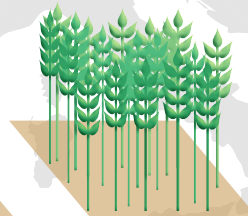
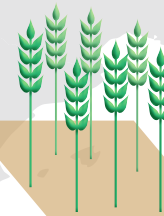
Fertilizers
are an integral
part of food
production.
Without them,
50% of the
world would
go hungry.



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



Source: Erisman et al, (2008) NatureGeo.

PRODUCTION OF MAIN FERTILIZER PRODUCTS

Raw materials

Intermediate products

Mineral fertilizers



Air (N₂)

Natural gas

Ammonia

Nitric acid

Carbon dioxide

Ammonium nitrate (AN)

Urea

UAN



Phosphate rock

Phosphate concentrate

Sulphuric acid

Phosphoric acid

Ammonia

Single superphosphate (SSP)

Mono- and diammonium phosphate (MAP/DAP)

Triple superphosphate (TSP)



Potash rock

Potash concentrate

Potassium chloride solution

Nitric acid

Sulphuric acid

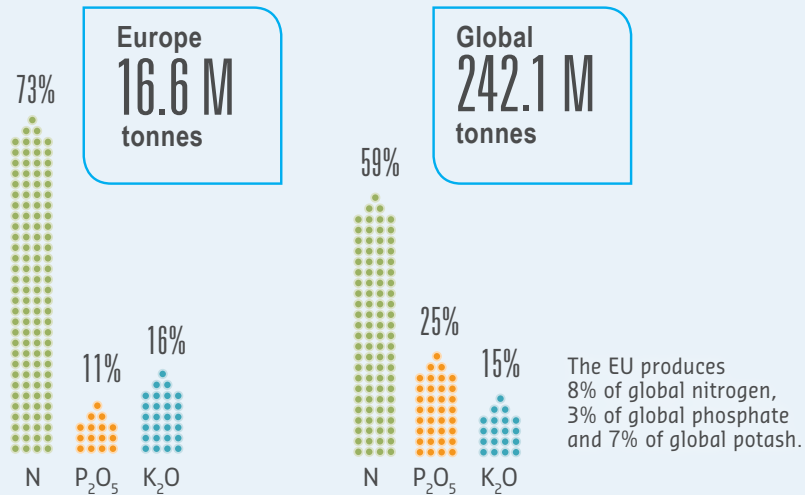
Muriate of potash (MOP)

Potassium nitrate (KN)

Sulphate of potash (SOP)

FERTILIZER PRODUCTION BY NUTRIENT

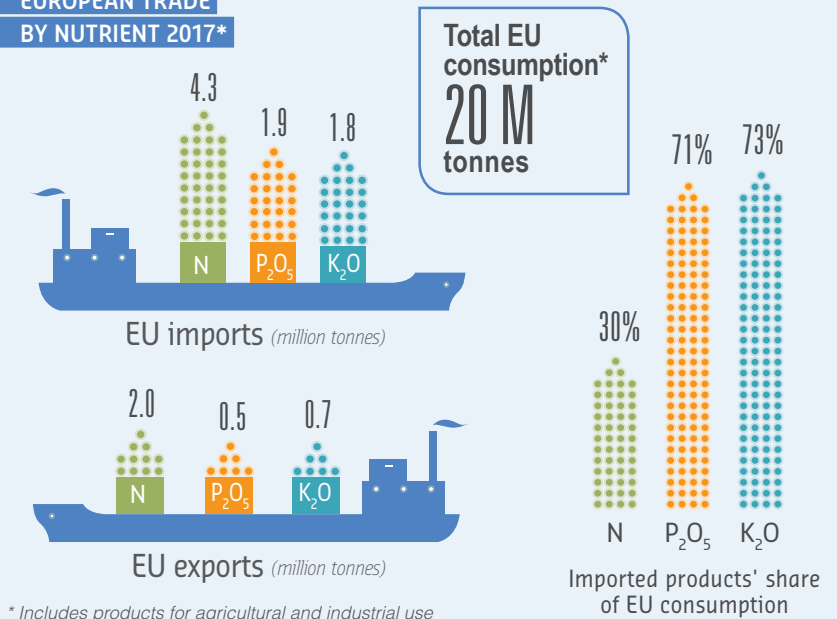
FERTILIZER PRODUCTION BY NUTRIENT 2016



Source: Fertilizers Europe/IFA

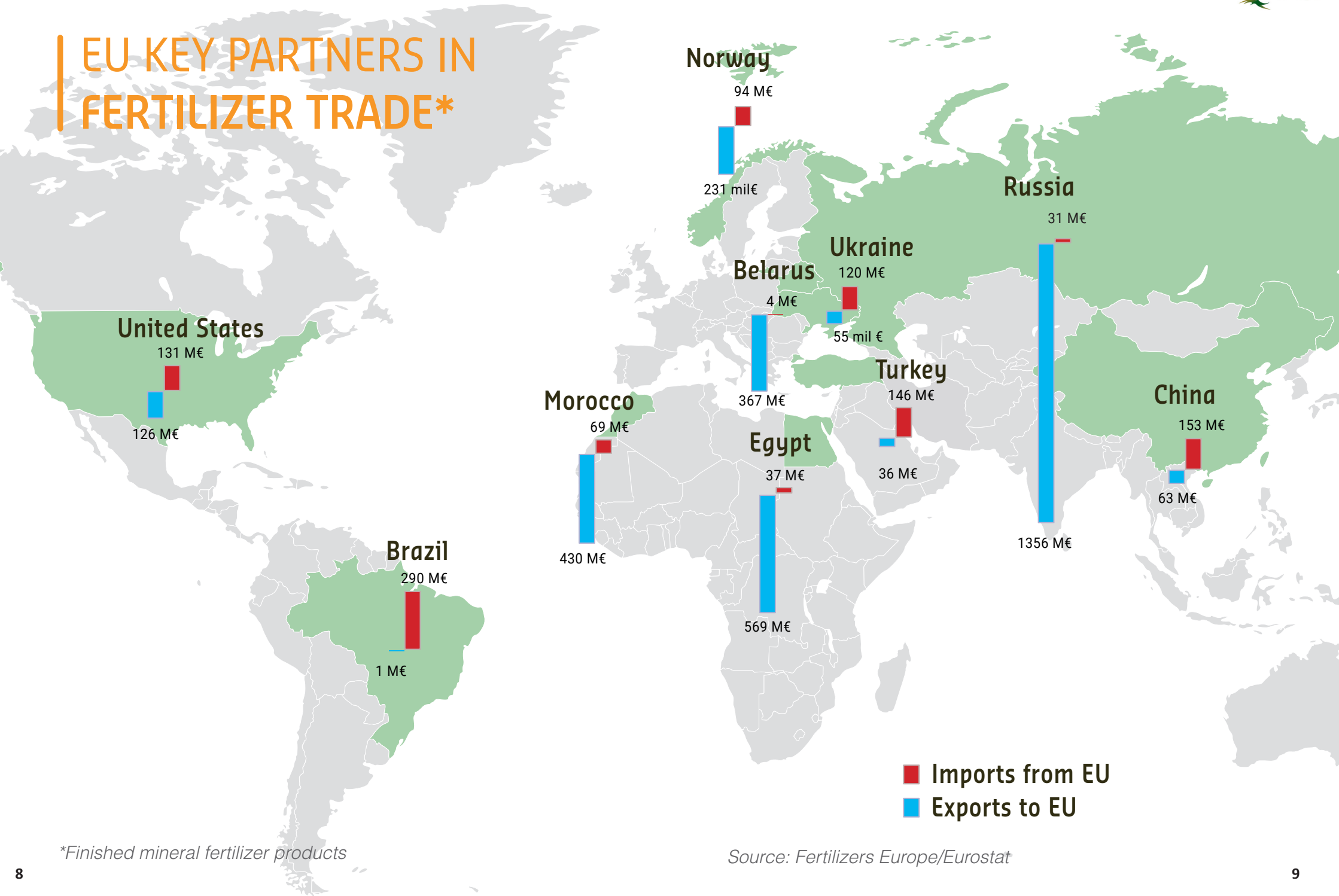
FERTILIZER IMPORTS AND EXPORTS IN THE EU

EUROPEAN TRADE BY NUTRIENT 2017*



Source: Fertilizers Europe/Eurostat

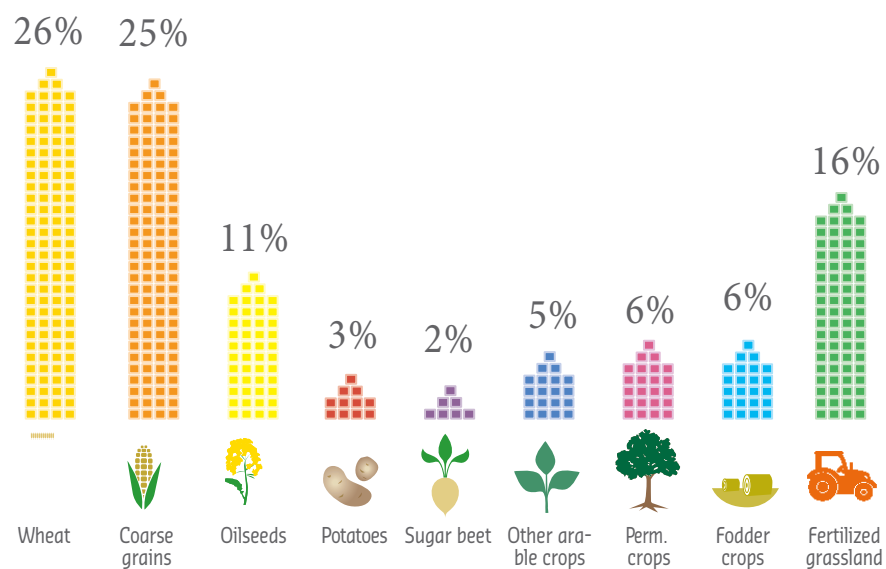
EU KEY PARTNERS IN FERTILIZER TRADE*



*Finished mineral fertilizer products

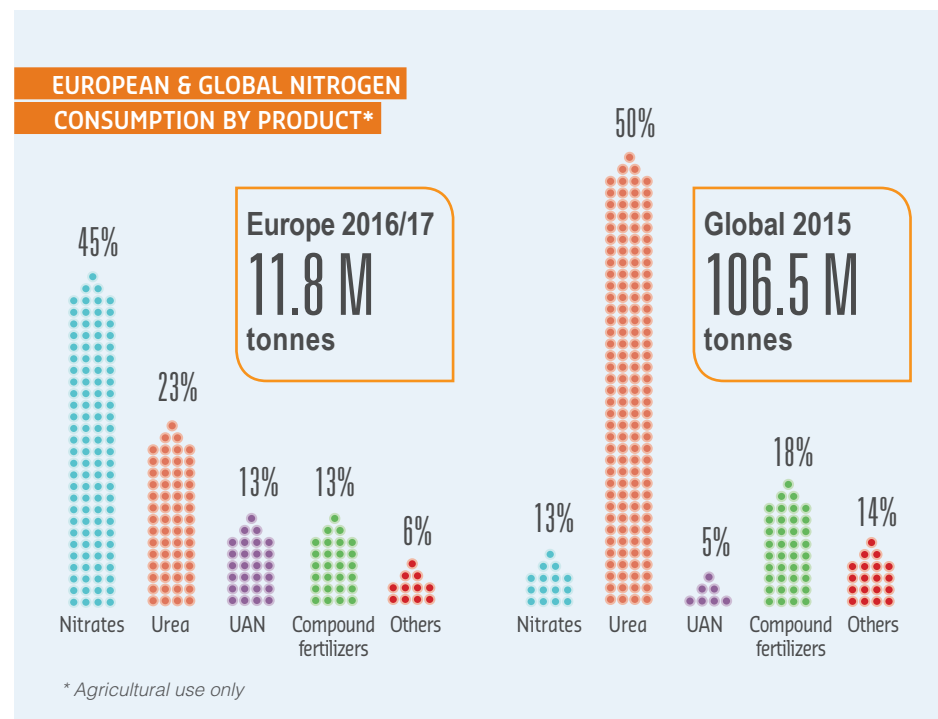
Source: Fertilizers Europe/Eurostat

FERTILIZER CONSUMPTION BY CROP



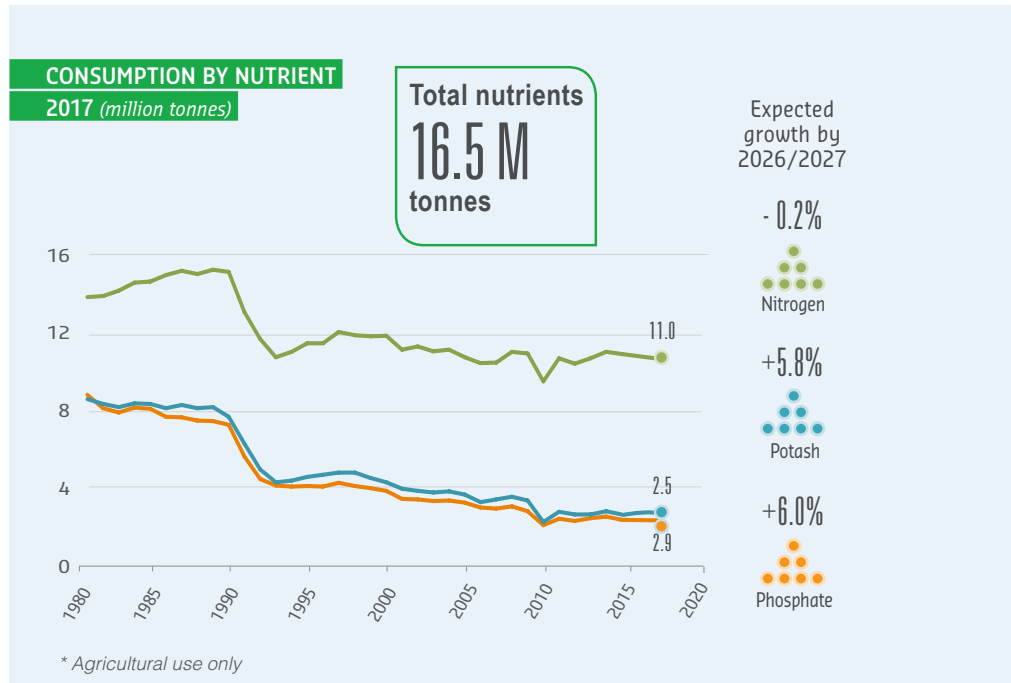
Source: Fertilizers Europe

NITROGEN FERTILIZER CONSUMPTION BY PRODUCT



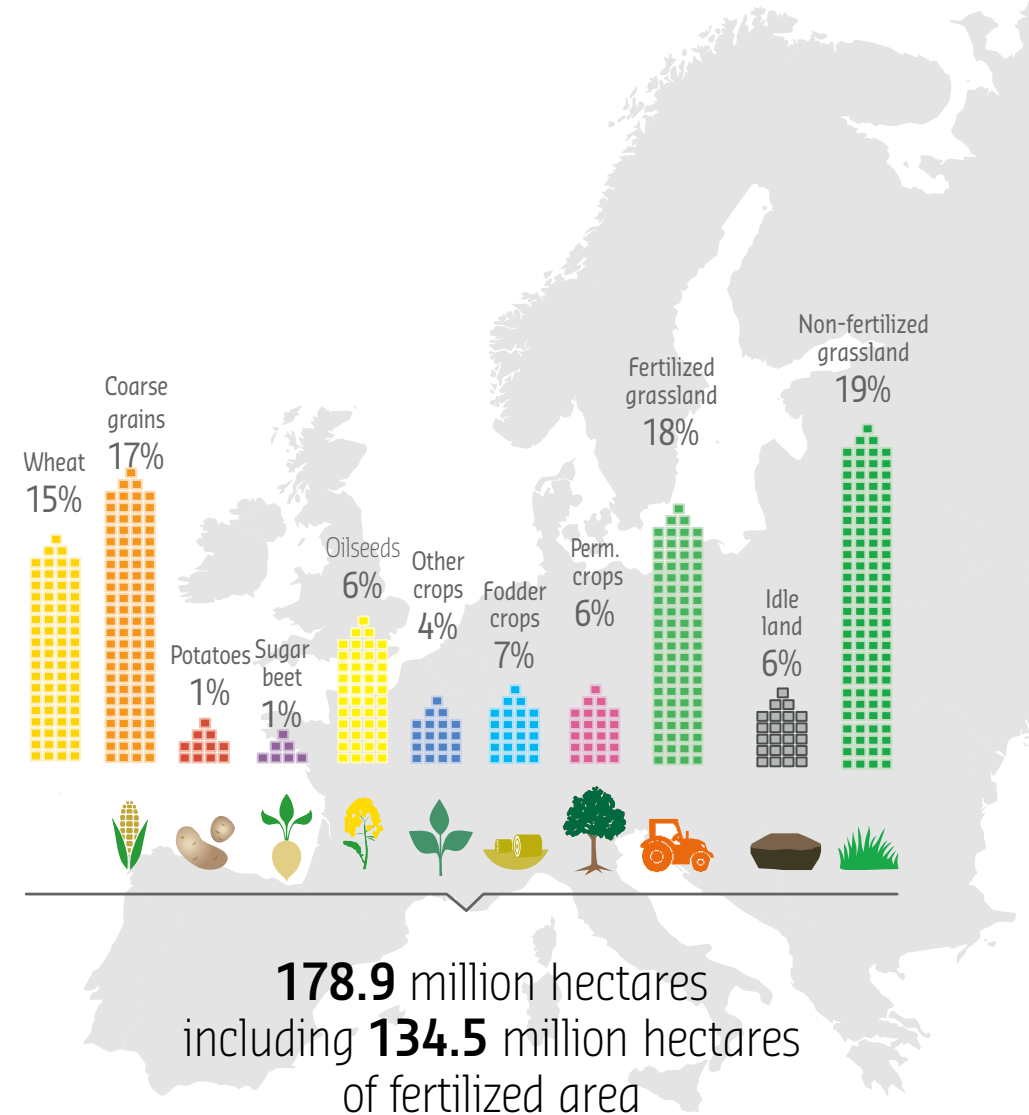
Source: Fertilizers Europe/IFA

FERTILIZER CONSUMPTION BY NUTRIENT



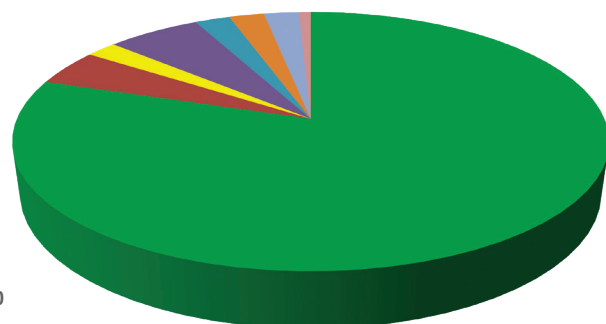
Source: Fertilizers Europe

AGRICULTURAL LAND USE IN THE EU



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 Members

CORPORATE

 ACHEMA <small>MEMBER OF THE EUROPEAN AGRICULTURAL GROUP</small> AB Achema Lithuania	 BOREALIS Borealis AG Austria	 GRUPA AZOTY Grupa Azoty SA Poland
 Anwil Anwil SA Poland	 CF CF Industries United Kingdom	 PFIC LTD PHOSPHORIC FERTILIZERS INDUSTRY & CHEMICALS PFIC LTD Greece
 OCI NITROGEN OCI Nitrogen BV The Netherlands	 AZOMURES <small>AN AMEROPOL COMPANY</small> Azomures SA Romania	 EUROCHEM Eurochem Antwerpen BV Belgium
 ICL <small>Where needs take us</small> ICL Fertilizers Europe BV The Netherlands	 PETROKEMIJA KUTINA Petrokemija Plc Croatia	 BASF <small>The Chemical Company</small> BASF AG/Fertilizer BU Europe Germany
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 NITROGENMÜVEK Zrt. Nitrogénművek Zrt Hungary	 NKF NKF s.a. Greece	

ASSOCIATIONS

 AIC Agricultural Industries Confederation	 ASSOFERTILIZZANTI Associazione Nazionale Fertilizzanti	 IVA Industrieverband Agrar e.V.	 PIPC Polish Chamber of the Chemical Industry
 ANFFE Asociación Nacional de Fabricantes de Fertilizantes	 BELFERTIL Belgian Mineral Fertilizer Association	 Meststoffen NEDERLAND Fertilizers Netherlands	 UNIFA Union des Industries de la Fertilisation



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.

Fertilizers Europe asbl
Avenue E. Van Nieuwenhuysse 4/6
B-1160, Brussels, Belgium
Tel: +32 2 675 3550
communications@fertilizerseurope.com

 Group Fertilizers Europe

 @FertilizersEuro

 www.fertilizerseurope.com