



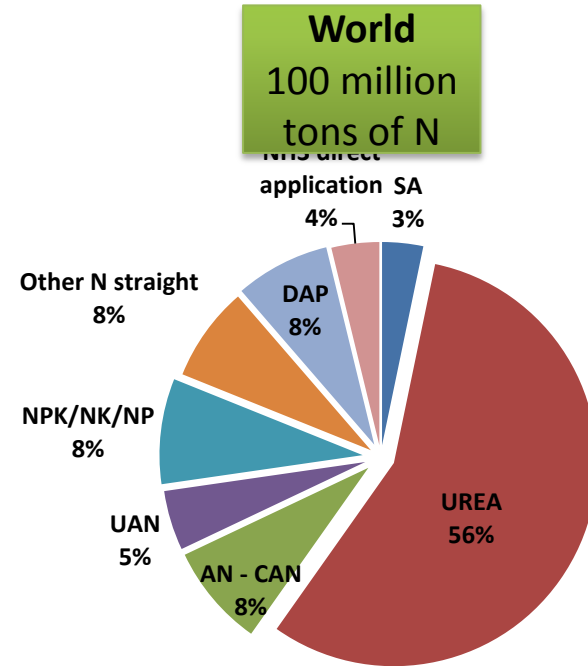
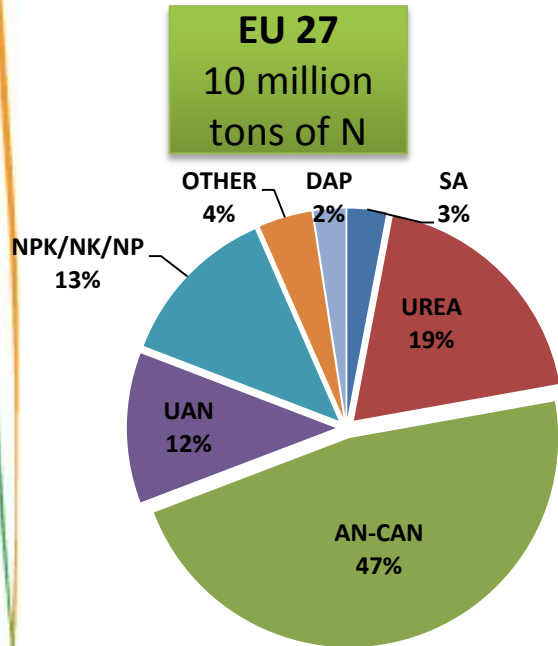
Irish Farmers Association conference
Restoring Competition to the EU Fertilizer Market
30 April 2015

Jacob Hansen



**Partnership
for growth**
Sustainable agriculture in Europe

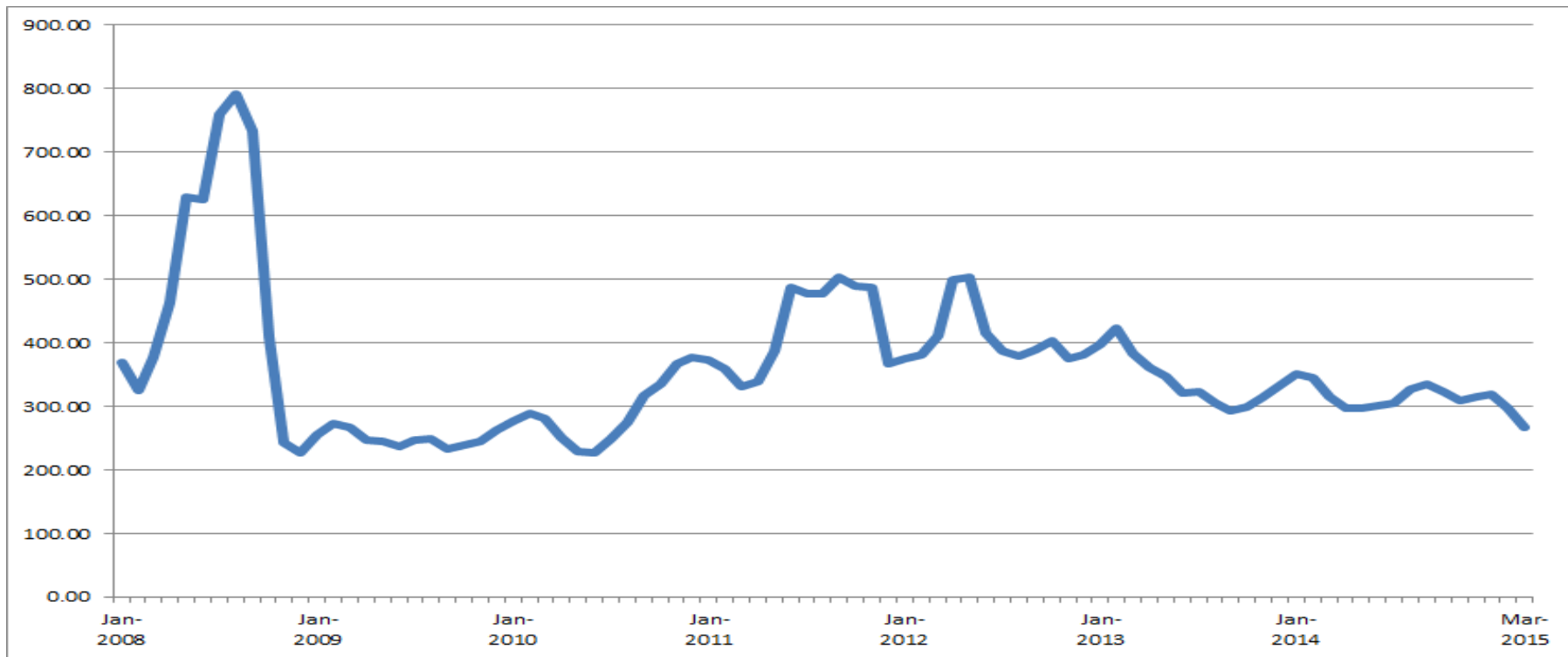
Fertilizer market



EU is a nitrates market while the world is a Urea one

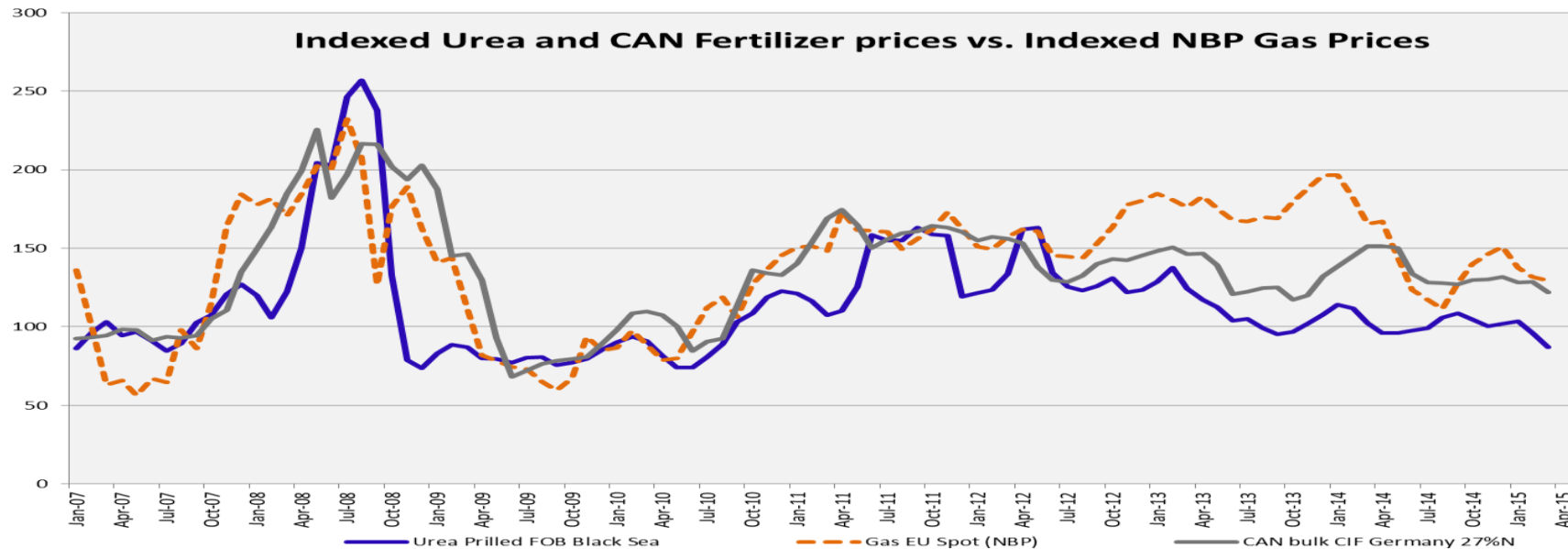


Urea FOB Yuzhny (USD/tonne)



Urea, CAN and Gas Index

US \$ prices indexed 2007=100



Sources: IMF, ICIS



Producers & Blenders

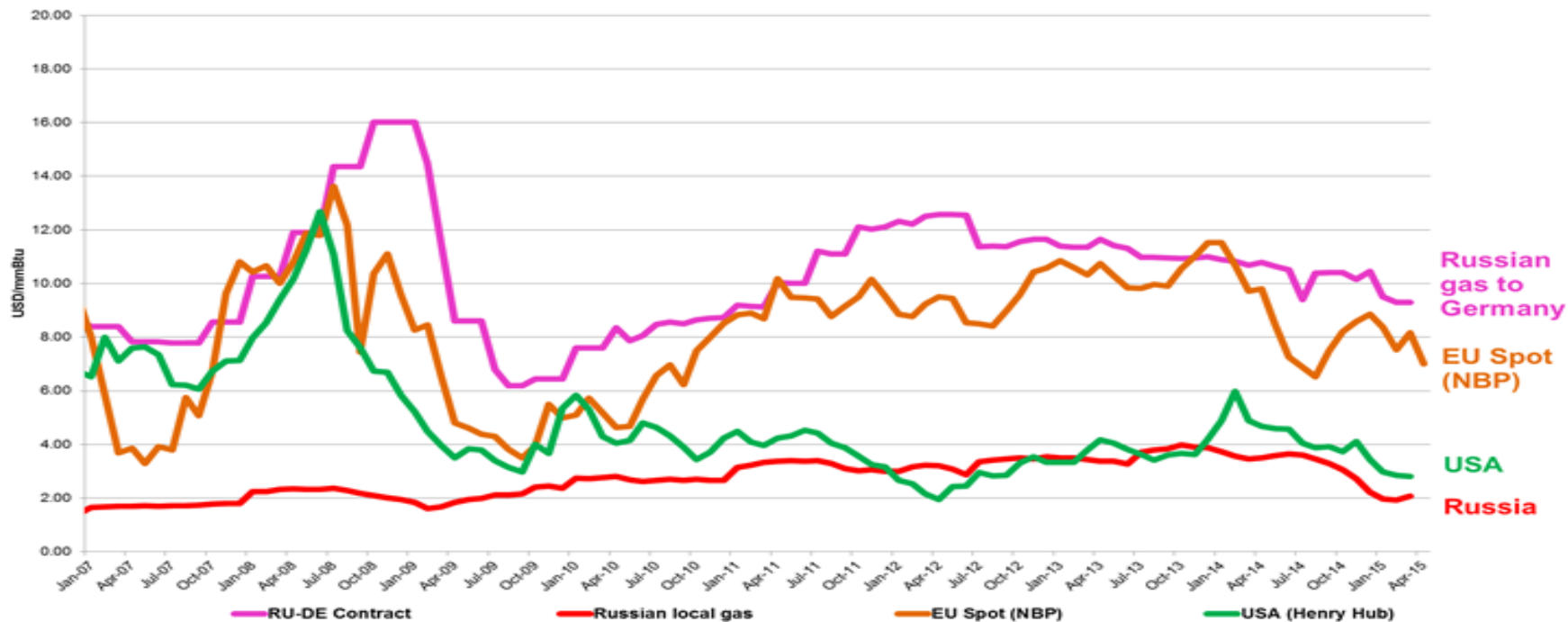
	EU 27*	World*
N	> 100	> 900
P	> 50	> 450
P (mining)	< 5	> 25
K (mining)	< 5	< 25

* importers, individual suppliers, wholesalers, distributors, retailers are not included

Many players in the EU fertilizer market



International gas prices (USD/mmBtu)



Source: IMF, Russian Federal Tariff Service, ICIS Heren EGM



Thank you!

Jacob Hansen

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<http://www.youtube.com/user/FertilizersEurope>



Group Fertilizers Europe



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