West Africa Fertilizer Watch

15 May 2020 — Bulletin No. 6

Providing Weekly Information on the Impact of COVID-19 on the West Africa Fertilizer Market

Highlights

- **COVID-19 restrictions relaxing.** At least six countries in the region — Ghana, Nigeria, Côte d’Ivoire, Benin, Senegal, and Togo — are progressively relaxing COVID-19 restrictions, including releasing curfews and allowing free movement.

- **Minor impacts on the supply chain.** Even though fertilizer is flowing, importers across the region are complaining about bottlenecks caused by COVID-19 restrictions, translating into higher logistics/transport costs that may ultimately impact the cost of fertilizers to farmers.

- **Complementing existing subsidy programs.** Countries with strong fertilizer subsidies already in place are continuing to implement their respective programs, while those with no subsidies or smaller programs are announcing new subsidies (Côte d’Ivoire, Togo, and Nigeria).

- **Fertilizer stocks are almost built up.** With about 1.1 million tons of fertilizer imported into the region since the beginning of 2020, this represents almost 45% of estimated demand and is ahead of the delivery schedule of recent years. With Nigeria’s urea production and carryover stocks from 2019, it is estimated that more than 80% of the required fertilizer is already available (more info in the Weekly Analysis).

- **Featured COVID-19 responses and analysis:** AFFM finance programmes, RCPA food security monitoring, and an AFAP AgrisMEs survey in Ghana.

Stats

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<th>Status of fertilizer supply chain</th>
<th>Fertilizer Markets</th>
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Fertilizer stock coverage as of 15 May 2020

- **COVID-19 pandemic:**
  - Diagnosed cases on a weekly basis
  - Health measures
  - Domestic transport
  - Economic measures
  - Port operations
  - Inventory & stocks
  - Fertilizer supply chain

- **Fertilizer market indicators:**
  - % stock coverage
  - % subsidized/total market
  - Retail/FOB unit price ratio

- **Economic status:**
  - Public health and economic measures, fertilizer logistics
  - % stock coverage
  - % subsidized/total market
  - Retail/FOB unit price ratio

Fertilizer stock coverage percentage

- Stock coverage 80% +
- 50-80%
- 30-50%
- 0-30%

The number below a country’s name represents its estimated annual fertilizer demand in 1000 metric tons. The figures are derived from 2016-2019 average consumption data collected by AfricaFertilizer.org.

This bulletin is made possible by the generous support of the American people through Feed the Future, the U.S. Government’s Global Hunger and Food Security Initiative. The contents are the responsibility of IFDC, WAFA, and AfricaFertilizer.org and do not necessarily reflect the views of Feed the Future or the United States Government.