29 MAY 2020 – BULLETIN NO. 8
WEST AFRICA FERTILIZER WATCH
PROVIDING WEEKLY INFORMATION ON THE IMPACT OF COVID-19 ON THE WEST AFRICA FERTILIZER MARKET
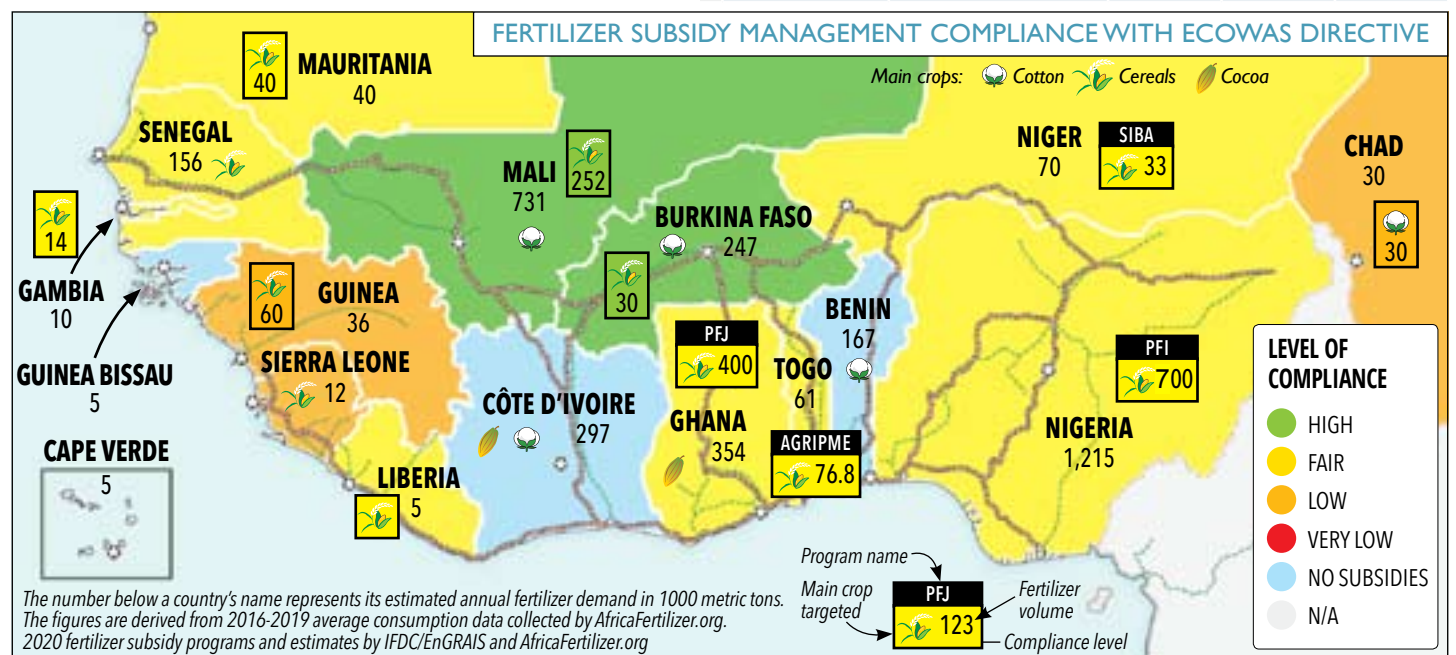
HIGHLIGHTS

▶ This week, the number of **new COVID-19 cases in the region has again slowed down**, growing by only 21% compared to 28% the previous week, leading countries in the region to further relax movement, economic and health restrictions.

▶ **Imports and local production of blended fertilizers continued,** with stock levels expected to be sufficient to cover the season's needs in the major fertilizer-consuming countries.

▶ **Distribution of fertilizers to producers has already begun in many countries,** whether under government subsidy programs (Ghana and Senegal) or not (cotton programs in Benin, Côte d'Ivoire, Burkina, PFI in Nigeria). Retailers are generally well stocked, even if sales are still limited, and farmers are sometimes afraid to travel (e.g. Ghana). Smuggling of fertilizer from the Ghanaian PFJ to Burkina Faso already seems to be active.

▶ The map below shows the fertilizer distribution programs in progress, and their level of **compliance with the draft/future ECOWAS Directive on smart design and management of fertilizer Subsidy programs.** Reforms have been substantive in some subsidy programs, notably in Ghana, Togo, Senegal and Burkina Faso. Nine countries are implementing and/or designing COVID-19-specific programs, most of them by increasing the outreach of their existing programs, with subsidy rates ranging from 10% to 70%.

Legend icons:
- COVID-19 % CHANGE
- HEALTH MEASURES
- ECONOMIC MEASURES
- PORT OPERATIONS
- DOMESTIC TRANSPORT
- BORDER CROSSING
- AGRO INPUT RETAIL SHOPS
- INVENTORIES & STOCKS
- FERTILIZER SUBSIDIES
- RETAIL/FOB PRICE RATIO

STATS

Country	Covid-19	Public Measures (Health)	Public Measures (Economic)	Supply chain (Port)	Supply chain (Transport)	Supply chain (Border)	Supply chain (Retail)	Fertilizer Markets (Inventories)	Fertilizer Markets (Subsidies)	Fertilizer Markets (%)
BENIN	red	yellow	yellow	green	green	green	green	green	green	green
BURKINA FASO	green	yellow	yellow	yellow	yellow	yellow	yellow	yellow	green	yellow
CAPE VERDE	yellow	orange	orange	green	green	yellow	green		green	green
CHAD	orange	orange	orange	yellow	yellow	yellow	green	yellow	orange	orange
CÔTE D'IVOIRE	yellow	yellow	yellow	green	yellow	green	green	green	green	green
GAMBIA	yellow	yellow	yellow	green	green	orange	green	green	green	green
GHANA	yellow	yellow	yellow	green	yellow	green	green	green	red	green
GUINEA BISSAU	yellow	yellow	yellow	green	yellow	green			green	green
GUINEA	yellow	yellow	yellow	yellow	yellow	yellow	yellow	yellow	green	green
LIBERIA	yellow	yellow	yellow	yellow	yellow	yellow	yellow	yellow	green	green
MALI	green	yellow	yellow	green	green	green	green	green	green	green
MAURITANIA	red	yellow	yellow	yellow	yellow	yellow	yellow	yellow	green	green
NIGER	green	yellow	yellow	yellow	yellow	yellow	green	red	orange	red
NIGERIA	orange	yellow	yellow	green	green	green	green	green	yellow	yellow
SENEGAL	yellow	green	green	green	green	green	green	green	red	red
SIERRA LEONE	orange	yellow	yellow	yellow	yellow	yellow	yellow	red	green	green
TOGO	yellow	yellow	yellow	green	green	green	green	green	green	green

Color legend:

Color	COVID-19 pandemic: diagnosed cases on a week-on-week basis	Economic status: public health and economic measures, fertilizer logistics	% stock coverage	% subsidized/ total market	Retail/FOB urea price ratio
green	Stable	No impact &/or improvement	80% +	< 30%	80% +
yellow	< 25%	Limited impact	50 – 80%	30 – 50%	50 – 80%
orange	25% – 50%	Moderate impact	30 – 50%	50 – 80%	30 – 50%
red	> 50%	Strong impact	< 30%	80% +	< 30%
grey	No data	No data	No data	No data	No data

FERTILIZER SUBSIDY MANAGEMENT COMPLIANCE WITH ECOWAS DIRECTIVE

Main crops: Cotton, Cereals, Cocoa

- MAURITANIA 40 — 40
- SENEGAL 156
- GAMBIA 10 — 14
- GUINEA BISSAU 5
- CAPE VERDE 5
- GUINEA 36 — 60
- SIERRA LEONE 12
- LIBERIA 5 — 5
- MALI 731 — 252
- BURKINA FASO 247 — 30
- CÔTE D'IVOIRE 297
- GHANA 354 — PFJ 400
- TOGO 61 — AGRIPME 76.8
- BENIN 167
- NIGER 70 — SIBA 33
- CHAD 30 — 30
- NIGERIA 1,215 — PFI 700

LEVEL OF COMPLIANCE
- HIGH (green)
- FAIR (yellow)
- LOW (orange)
- VERY LOW (red)
- NO SUBSIDIES (blue)
- N/A (grey)

Program name / Main crop targeted / PFJ 123 / Fertilizer volume / Compliance level

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. 2020 fertilizer subsidy programs and estimates by IFDC/EnGRAIS and AfricaFertilizer.org

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