

Market evolution: Fertilisers (CN 31) — 2015–2025

Introduction

Between 2015 and 2025, the European Union's external trade in fertilisers (CN 31) underwent a period of intense turbulence, marked by an explosive price shock in 2022, a profound re-drawing of supplier relationships, and a widening trade deficit. While the value of both exports and imports grew strongly over the decade, the increase was largely driven by higher prices rather than by a commensurate expansion of volumes. This report describes and interprets the main dynamics using the data provided, drawing on the General Overview, the Top Partners and the complementary dashboards.

A market shaped by the 2022 price explosion

Overall trade values skyrocketed in 2022, driven by an unprecedented price surge.

The most dramatic feature of the period is the 2022 spike. In that year, EU fertiliser exports peaked at EUR 9,015,174,564.36 and imports at EUR 11,961,812,957.22 (see General Overview). These records were propelled almost entirely by prices: the average export price jumped from EUR 310.32 per tonne in 2015 to a maximum of EUR 666.53 in 2022, and the import price from EUR 285.22 to EUR 654.67. The price surge alone explains why trade values could more than double in a single year even as quantities remained relatively stable or declined.

After 2022, prices partially retrenched but remained elevated above pre-shock levels.

Both export and import prices contracted sharply after 2022, yet they did not fall back to the 2015 baseline. In 2025, export prices still averaged EUR 444.93 per tonne (+43.4 % compared with 2015) and import prices EUR 373.35 (+30.9 %). The persistence of higher prices, well above the 2016-2020 range, points to structurally tighter global fertiliser markets, largely caused by the upheaval in energy costs and supply-chain disruptions that followed Russia's 2022 invasion of Ukraine.

The trade deficit worsened markedly as import growth outpaced exports.

At the start of the window (2015) the EU's fertiliser trade was nearly balanced, with a deficit of only EUR 57.8 million. By 2025, the deficit had ballooned to EUR 1,422.1 million. Imports expanded by 67.1 % in value (from EUR 4.72 billion to EUR 7.88 billion), while exports grew by a more modest 38.7 % (from EUR 4.66 billion to EUR 6.46 billion). In volume terms, exports even declined slightly (−4.1 %, from 15.0 million tonnes to 14.4 million tonnes), whereas imports rose by 25.6 % (from 16.5 million tonnes to 20.8 million tonnes). Consequently, the EU's net import reliance rose from 5.6 % in 2015 to 7.6 % in 2025, having touched a peak of 14.6 % during the 2022 crisis (see Net Import Reliance).

Macro-trade indicator	2015	2025	Change (%)
Exports (value, EUR)	4,658,527,879.67	6,460,002,881.18	+38.7
Imports (value, EUR)	4,716,368,100.01	7,882,072,370.34	+67.1
Trade balance (EUR)	−57,840,220.33	−1,422,069,489.16	–
Export price (EUR/tonne)	310.32	444.93	+43.4
Import price (EUR/tonne)	285.22	373.35	+30.9
Net import reliance (%)	5.65	7.63	+35.2

Reconfiguration of import sources: the decline of Belarus and the rise of Egypt

Russian imports proved resilient, maintaining their top position despite sanctions and price turbulence.

The Russian Federation was the EU's leading external supplier throughout the entire decade. Its fertiliser exports to the EU rose from EUR 1.53 billion in 2015 to EUR 1.74 billion in 2025 (+13.6 %), with an interim peak of EUR 2.56 billion in 2022. This resilience stands out against a backdrop of sweeping sanctions and voluntary corporate restrictions. The Volatility & Shocks data underscore that Russian volumes were remarkably stable (coefficient of variation of only 0.12, the lowest among major partners), suggesting that trade in essential fertilisers was largely depoliticised.

Egypt and Morocco dramatically expanded their market share, partially compensating for the collapse of Belarus.

Imports from Egypt surged from EUR 202.8 million to EUR 1,505.8 million (+642.5 %), while Moroccan shipments grew from EUR 371.1 million to EUR 961.1 million (+159.0 %). Together they supplied a quarter of all extra-EU fertiliser imports in 2025. In stark contrast, Belarusian imports collapsed from EUR 464.6 million in 2015 to barely EUR 28.4 million in

2025 (–93.9 %), a direct consequence of the EU's restrictive measures and the logistical impossibility of using Baltic ports. The shift is clearly visible in the top-partner ranking (see Top Partners).

Top import partner	2015 (EUR)	2025 (EUR)	Change (%)
Russian Federation	1,530,636,532.75	1,738,413,437.55	+13.6
Egypt	202,798,933.45	1,505,775,364.68	+642.5
Morocco	371,120,954.17	961,092,499.56	+159.0
Belarus	464,587,128.34	28,446,827.92	–93.9
Algeria	282,820,298.81	469,381,844.45	+66.0
Norway	212,863,871.89	307,168,648.88	+44.3

Import concentration declined, reflecting a more diversified supplier base.

The Herfindahl-Hirschman Index (HHI) for import values fell from 1,426.9 in 2015 to 1,153.7 in 2025 (–19.1 %). The decline in concentration is especially visible in volume terms, where the HHI dropped by 24.0 % (see Concentration). This diversification was partly forced by the loss of Belarus but also reflects the emergence of new large-scale suppliers in North Africa and the Middle East.

Multiple partners experienced extreme price shocks in 2022 that distorted trade flows.

The Shock Events identified in the data show that 2022 was a year of synchronised price spikes. For imports, the most abnormal event was a 129.6 % price shift from Israel (abnormality score 11.7), followed by Canada (141.2 % shift, score 9.8) and the United States (378.5 % shift centred in 2020, score 9.5). All these shocks were price-driven; quantities often fell or recovered only slowly. This illustrates how the global energy crunch, tight fertiliser supply and logistical bottlenecks converged to create a perfect storm in the EU's fertiliser import bill.

Export resilience and EU specialisation in a high-value segment

EU exports experienced a broad-based recovery, with Ukraine and the United States emerging as key growth markets.

Extra-EU exports of fertilisers expanded in value by 38.7 % over the decade. While Brazil remained the largest single destination (EUR 567.0 million in 2025, down from EUR 664.0 million in 2015), the most striking gains were recorded in Ukraine and the

United States. Exports to Ukraine jumped from EUR 31.6 million to EUR 685.0 million (+2,068.3 %), making it the third-largest destination by 2025, just after the United Kingdom. Shipments to the United States rose by 133.2 % to EUR 507.4 million. The United Kingdom, despite Brexit, remained the second-largest market, growing by 17.0 % to EUR 768.9 million.

Top export destination	2015 (EUR)	2025 (EUR)	Change (%)
Brazil	664,041,242.53	567,010,094.92	−14.6
United Kingdom	657,222,135.17	768,856,372.82	+17.0
Ukraine	31,592,349.26	685,026,461.54	+2,068.3
United States	217,560,475.55	507,357,905.67	+133.2
Norway	178,958,899.21	484,155,194.94	+170.5
China	265,170,892.89	355,124,725.21	+33.9

Nitrogenous fertilisers (CN 3102) dominate both exports and imports, while mixed fertilisers (CN 3105) hold higher unit values.

The product breakdown (see Product Comparison) reveals that mineral or chemical nitrogenous fertilisers (CN 3102) accounted for the largest share of tonnage in both directions. In 2025, imports of CN 3102 reached 12.3 million tonnes (value EUR 4.13 billion), while exports stood at 6.5 million tonnes (EUR 2.14 billion). Mixed fertilisers (CN 3105) were the highest-value-per-tonne segment, with an import price of EUR 532.6 per tonne and an export price of EUR 839.3 per tonne in 2025 – a premium that indicates the EU's strong position in formulated, nutrient-blended products. Potassic and phosphatic fertilisers (CN 3104 and CN 3103) represent smaller but still significant flows.

EU production grew substantially, and export propensity has increased, strengthening the bloc's global position.

EU production of fertilisers, measured in quantity, rose from 36.3 billion kg in 2015 to 40.2 billion kg in 2024 (+63.0 % from the earliest available year), while production value climbed from EUR 14.4 billion to EUR 17.7 billion (see Production Volumes). Export propensity – the share of production sold outside the EU – moved from 16.4 % to 27.4 % (2015-2024, +67.6 %), confirming that European manufacturers have become progressively more outward-oriented (see Export Propensity).

Within the EU, Lithuania, Finland, and Greece exhibit the highest revealed comparative advantages in fertilisers.

Based on the 2025 specialisation map (see Specialisation), the member states most specialised in fertiliser production are Lithuania (RSCA 0.80), Finland (0.54), Greece (0.50), Bulgaria (0.47) and Croatia (0.43). At the opposite extreme, Cyprus (RSCA −0.99), Ireland

(−0.89) and Denmark (−0.87) show almost no specialisation in the sector. This geographic focus means that fertiliser trade policy and energy-cost dynamics affect EU regions very unevenly.

Conclusion

The 2015-2025 period has profoundly reshaped EU fertiliser trade. A once near-balanced account turned into a structural deficit as import volumes outgrew exports and prices stayed elevated after the 2022 super-spike. The supplier base transformed: the disappearance of Belarus was more than compensated by the rapid growth of Egypt, Morocco and Algeria, while Russia retained its pivotal role. On the export side, European producers showed resilience, expanding deliveries to Ukraine and the United States and raising their export propensity to a record high. The data point to a fertiliser market that has become both more diversified and more volatile, with member-state specialisation concentrated in a handful of eastern and northern countries. These trends are likely to persist as long as the global energy and food-security contexts remain unsettled.

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If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at support@tradedashboard.eu. You can find my CV at [this address](#).