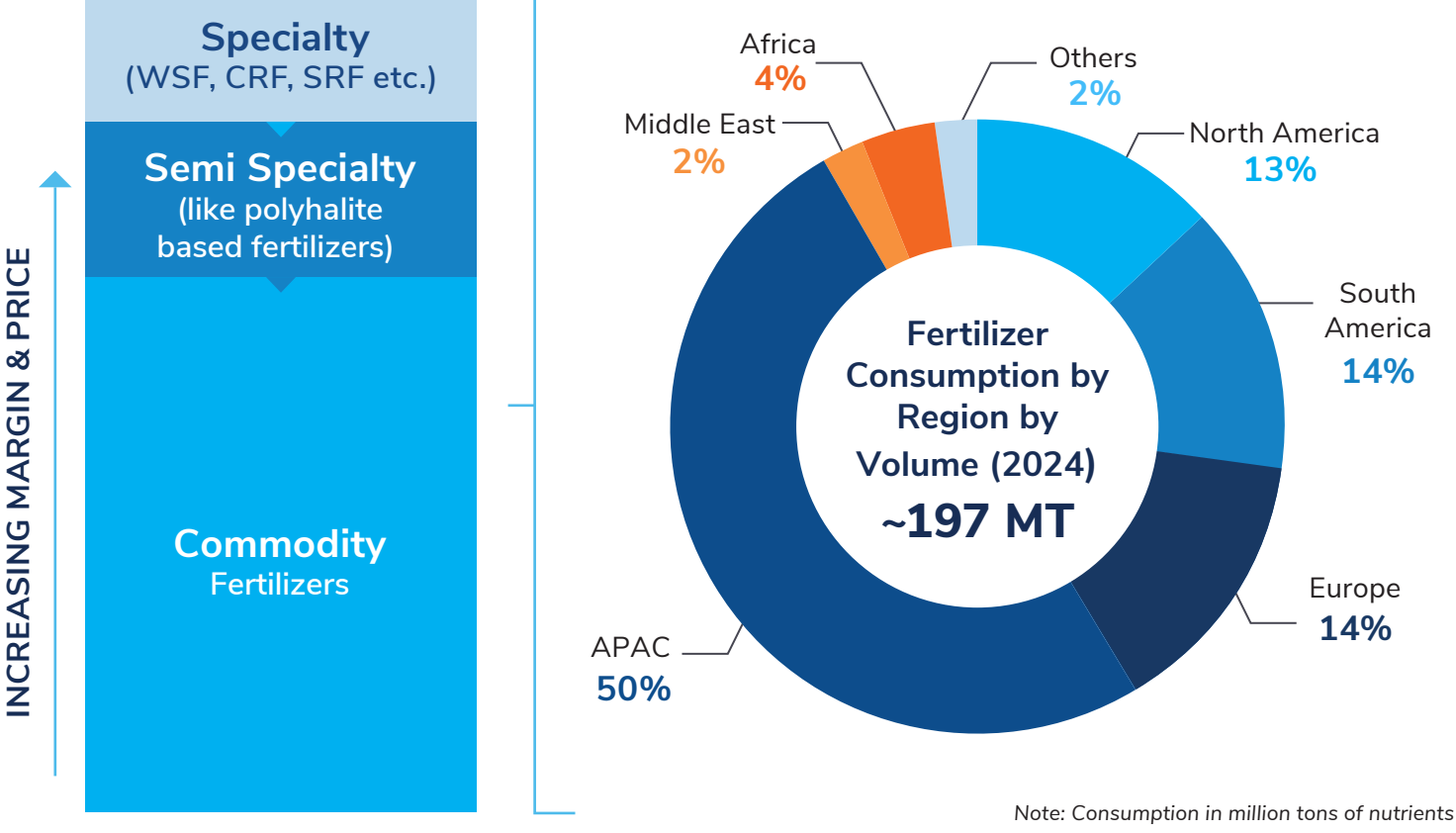


FERTILIZERS 2030

The Five Decisions Every Industry Leader Must Make

THE GLOBAL REALITY
Where Fertilizers Are Consumed?



MAJOR GLOBAL PRODUCERS BY NUTRIENT (N / P / K)

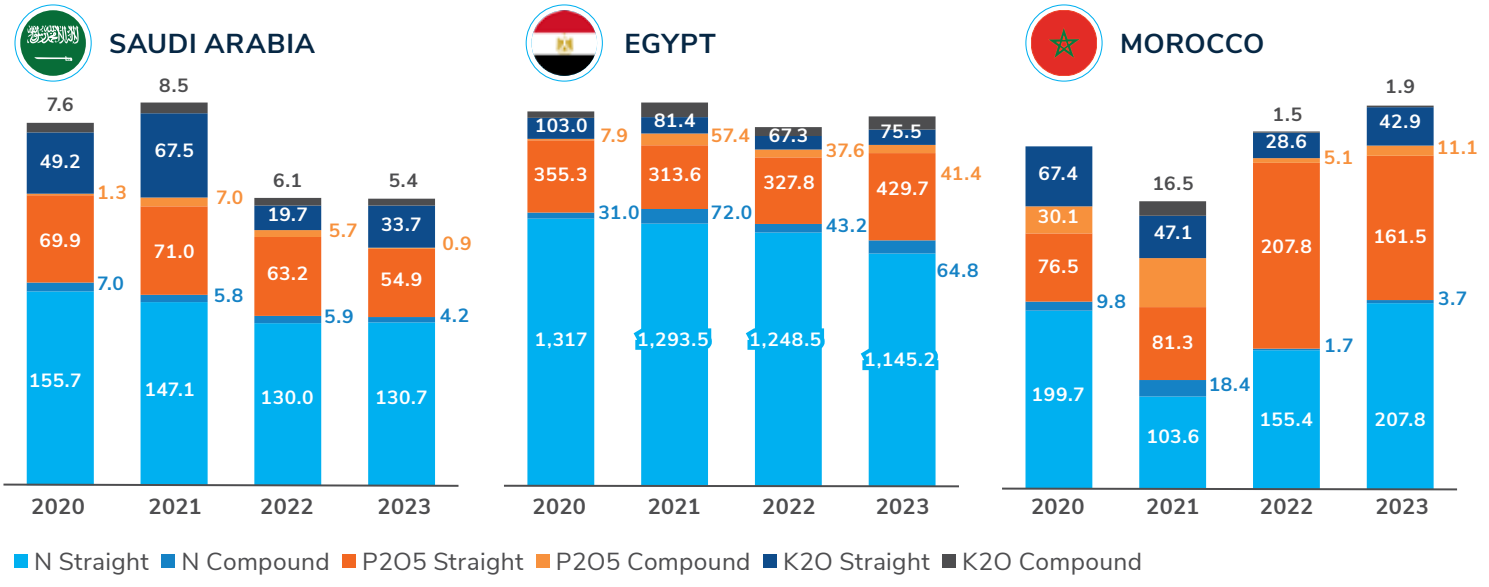
Major Companies	N	P	K
Arab Potash			✓
Nutrien	✓	✓	✓
Mosaic	✓	✓	✓
Belaruskali	✓	✓	✓
Uralkali			✓
K+S	✓	✓	✓
OCF	✓	✓	
Yara	✓	✓	✓
CF Industries	✓		
Eurochem	✓	✓	✓
ICL	✓	✓	✓

BIO

Source: Nutrien Factbook 2024 and Company benchmarking

MENA NUTRIENT PRODUCTION CAPACITY MAP
Key Markets, Primary Nutrient Consumption

'000 Tons Of Nutrients



FERTILIZER CAPACITY BY COUNTRY ('000 TONS OF NUTRIENTS PER YEAR) - 2023

N	Saudi Arabia	5,352	P	Morocco	8,085	Tunisia	2,123	K	Jordan	1,586
	Egypt	5,130		Saudi Arabia	3,107	Jordan	1,093			

Source: Nutrien Factbook 2024, IFASTAT

KEY FORCES RESHAPING FERTILIZERS
What Is Redefining Fertilizer Economics?



THE FUTURE VALUE POOL: SPECIALTY FERTILIZERS
Where the Next Profit Engine Lies

Specialty Fertilizers (2024)

Market Demand (Tons)	17-19 MT
Growth Potential from 2024-2035 (Tons)	~4% to 6%
Growth from 2017 to 2024 (Tons)	~7% to 7.5%
Competitive Intensity (Primary Competitors)	>50
Entry Barrier	Med
Application Diversity (Major application share)	Med-High
Regulatory Impact	Med

Key broad categories of specialty fertilizers 17-19 MT (2024)

Segment	Market Share	CAGR
Water Soluble Fertilizers	39%	4-5%
Controlled Release Fertilizers	16%	6-7%
Bio-control Fertilizers	16%	9-10%
Slow Release Fertilizers	13%	6-7%
Liquid Fertilizers	8%	5-6%
Biostimulants	8%	8-9%
Chelated Micronutrients	1%	6-7%

THE FIVE LEADERSHIP DECISIONS
The Frost & Sullivan Leadership Playbook

Rebalance portfolios toward specialty, water-soluble, and crop specific solutions

Redesign cost structures and feedstock sourcing to remain competitive against structurally advantaged producers

Move closer to farmers - strengthen downstream presence through retail, agronomy services, digital advisory platforms

Build targeted partnerships across the ecosystem to secure feedstock, expand regional access, and accelerate technology capabilities

Embed sustainability and nutrient-use efficiency into core economics and product differentiation

