EU-NIGERIA
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MARKET INTELLIGENCE BRIEF

Nitrogenous Fertiliser and Ammonia

HS 3102 | EUNAC 2026

Global Gateway

Funded by the European Union

The Platform is managed by Agribusiness Register (ABR) Limited

AGRIBUSINESS REGISTER LIMITED

EU Import Market (2024) **USD 8.72 Billion**	Nigeria’s Export Target **USD 2.62 Billion (30%)**
Combined Production Capacity **6.5 Million MT/Year**	EU Supply Gap (Q1 2026) **-85% vs Prior Year**

EU MARKET OVERVIEW & NIGERIA'S STRATEGIC POSITION

The European Union remains a major importer of nitrogen-based fertilisers due to higher domestic production costs and growing demand for reliable, sustainable supply sources. The European fertiliser market is in an acute supply crisis. EU nitrogen fertiliser imports collapsed to just 179,877 tonnes in January 2026, down from 1.18 million tonnes a year earlier. Recent policy measures aimed at diversifying supply and promoting lower-carbon production have increased the importance of competitive international suppliers. For Nigerian producers, this presents an opportunity to strengthen trade relationships with the EU by meeting market requirements on quality, sustainability, and reliability. With its established production capacity, Nigeria is well-positioned to support the EU's agricultural supply needs while expanding its access to a high-value export market.

MARKET SNAPSHOT

EU Import Value (2024)	USD 8.72 billion — growing to USD 15.6B by 2030 (CAGR 6.1%)
Dominant Suppliers	Egypt 41%, Russia 33%, Algeria 17% — all facing tariffs, CBAM, or Hormuz disruption
Russian Tariff Escalation	EUR 40–45/tonne (2024) rising to EUR 315–430/tonne by mid-2028
CBAM Advantage — Nigeria	EUR 15–20/tonne lower levy for modern plants vs Russian/Algerian alternatives
EU MFN Tariff on Nigerian Urea	6.5% (urea) / 5.5% (ammonia) — MFN suspension proposed Feb 2026
EPA Ratification Impact	Eliminates 6.5% tariff — worth USD 20–30/tonne price advantage

NIGERIA'S PRODUCTION POWERHOUSES

- Dangote Fertiliser (Lekki FTZ, Lagos) — Africa's largest urea plant: 3 million MT/year; USD 2.5B investment; gas-backed via Niger Delta pipeline.
- Indorama Eleme (IEFCL, Onne, Rivers State) — World's largest single-train urea plant; 4,000 MT/day urea + 2,300 MT/day ammonia; USD 1.25B expansion (IFC, AfDB, BII co-financed).
- Nigeria exported 3.2M MT in 2024, earning ~USD 850M — a near five-fold increase since 2017.

INVESTMENT OPPORTUNITIES

- Dangote 4th Production Train — Expand to 8M+ MT/year total; USD 2.5–3B; EU development bank co-financing + European buyer pre-commitment.
- Nigeria Blue/Green Ammonia Hub — Niger Delta gas (blue) + North-West solar (green); USD 500M first train targeting EU hydrogen import mandates.
- CBAM Compliance Infrastructure Fund — EUR 15–20M in emissions monitoring and third-party verification for Dangote & IEFCL.
- Onne–Rotterdam Fertiliser Logistics Corridor — Dedicated bulk vessel scheduling, terminal upgrade, and supply-chain finance; EUR 30–50M.

KEY EU BUYERS

Yara International	World's largest fertiliser company — explicit supply diversification mandate
OCI Nitrogen (Netherlands)	Major EU urea & ammonia trader — Rotterdam terminal ready for Nigerian bulk urea
Koch Fertilizer	Global trader evaluating West African nitrogen as Russian displacement strategy
HELM AG (Germany)	Agricultural chemicals distributor — target German & Polish markets
Ameropa (Switzerland)	Geneva-based trader — Eastern Europe distribution (Poland, Romania, Balkans)

What Is EUNAC

ENGAGE WITH NIGERIA AT EUNAC 2026
LAGOS, 25 JUNE 2026

B2B Matchmaking | Investment Wall | Commodity Showcase | Policy Dialogue | Deal Signing

EU–Nigeria Agribusiness Connect 2026 (EUNAC 2026) is a EU–Nigeria agribusiness trade and investment platform designed to connect Nigerian and European businesses, investors, exporters, and technology providers through B2B matchmaking, partnerships, and market access opportunities. The event promotes two-way trade by supporting Nigerian exports to the EU while creating opportunities for European agribusiness products, technology, and services in Nigeria.

EUNAC will be an annual event from the first edition in 2026.

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