



2024 G20 Rio de Janeiro Summit Final Compliance Report

20 November 2024 to 5 November 2025

Prepared by
Irene Wu and Mahek Kaur
and the G20 Research Group

www.g20.utoronto.ca • g20@utoronto.ca • [@g20rg](https://twitter.com/g20rg)

18 November 2025



G20 Research Group
University of Toronto
6 Hoskin Avenue, Toronto Ontario M5S 1H6 Canada
g20@utoronto.ca +1-416-946-8953
www.g20.utoronto.ca www.g7g20.utoronto

Contents

Research Teams	4
Compliance Directors	4
Lead Analysts	4
Compliance Analysts	4
Introduction and Summary	6
Methodology and Scoring System	6
Commitment Breakdown	6
Selection of Commitments	6
2024 Rio de Janeiro Summit Final Compliance Scores	7
2024 Rio de Janeiro Summit Final Compliance by Member	7
2024 Rio de Janeiro Summit Final Compliance by Commitment	7
Table 1: 2024 G20 Rio de Janeiro Summit Commitments Selected	8
Table 2: 2024 G20 Rio de Janeiro Final Compliance Scores	9
Table 3: 2024 G20 Rio de Janeiro Final Compliance by Member	10
Table 4: 2024 G20 Rio de Janeiro Final Compliance Scores by Commitment	10
Table 5: G20 Compliance by Member, 2008–2024	11
1. Energy: Energy Transition Supply Chains	13
2. Development: Financial Support for Low- and Middle-Income Countries	113
3. Development: Integration of the African Union	403
4. Institutional Reform: Reforming Global Governance Institutions	447
5. Climate Change: Greenhouse Gas Reduction	570
6. Climate Change: Disaster Risk Reduction	685
7. Environment: Biodiversity	780
8. Health: Inclusive Health Systems	883
9. Macroeconomics: Fiscal Policy	1064
10. Regional Security	1141
11. Food and Agriculture: Fertilizer Shortages	1295
12. Gender Equality: Labour Markets	1333
13. Digitalization: Digital Platform Transparency	1399

11. Food and Agriculture: Fertilizer Shortages

“We aim to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.”

G20 Rio de Janeiro Leaders’ Declaration

Assessment

	No Compliance	Partial Compliance	Full Compliance
Argentina		0	
Australia		0	
Brazil			+1
Canada		0	
China		0	
France		0	
Germany			+1
India		0	
Indonesia			+1
Italy		0	
Japan			+1
Korea		0	
Mexico		0	
Russia	−1		
Saudi Arabia	−1		
South Africa		0	
Türkiye	−1		
United Kingdom		0	
United States			+1
African Union		0	
European Union		0	
Average	+0.10 (55%)		

Background

Although first mentioned in the 2012 Los Cabos Summit, fertilizer shortages were reintroduced 10 years later at the 2022 Bali Summit.⁸⁰⁴⁷ Since then, G20 leaders have acknowledged the critical role of fertilizers in global food production and highlighted the need to address these shortages to support efforts in increasing food security and mitigating malnutrition.⁸⁰⁴⁸ According to the Food and Agriculture Organization of the United Nations (FAO), the demand for nitrogen, phosphorus and potassium in fertilizers has steadily increased from 2016 to 2022.⁸⁰⁴⁹ The G20 leaders recognize that addressing fertilizer shortages is crucial for boosting agricultural productivity and ensuring food security. By enhancing local production, improving trade and optimizing fertilizer use, the G20 aims to build on its past commitments to sustainable agricultural development

⁸⁰⁴⁷ G20 Bali Leaders’ Declaration, G20 Information Centre (Toronto) 16 November 2022. Access Date: 5 March 2025.

<http://www.g20.utoronto.ca/2022/221116-declaration.html>

⁸⁰⁴⁸ G20 New Delhi Leaders' Declaration, G20 Information Centre (Toronto) 9 September 2023. Access Date: 5 March 2025.

<http://www.g20.utoronto.ca/2023/230909-declaration.html>

⁸⁰⁴⁹ World fertilizer trends and outlook to 2022, Food and Agriculture Organization of the United Nations (Rome) n.d. Access Date: 5 March 2025. <https://openknowledge.fao.org/server/api/core/bitstreams/42d5a668-f44c-4976-8540-8efdb0f4d17b/content>

and global food security. That said, the G20 has supported initiatives aimed at supporting food security since 2009.⁸⁰⁵⁰

At the 2009 Pittsburgh Summit, G20 leaders recognized the importance of sustained funding and targeted investments needed to improve food security.⁸⁰⁵¹

At the 2010 Toronto Summit, G20 leaders reaffirmed their commitments to funding and investments to improve long-term food security.⁸⁰⁵² G20 leaders also called for financing to improve agricultural productivity in low-income countries.

At the 2011 Cannes Summit G20 leaders launched the Agricultural Market Information System, aimed at increasing transparency in agricultural markets.⁸⁰⁵³ G20 leaders also reaffirmed their commitment to financial support for agriculture in low-income countries.

At the 2012 Los Cabos Summit, G20 leaders recognized the intersection between sustainable agriculture and climate change, affirming their support for available technologies, such as soil fertility enhancement.⁸⁰⁵⁴ G20 leaders also called for an increase in the world's food supply, through adherence to the Agricultural and Food Strategic Plan.

At the 2013 St. Petersburg Summit, G20 leaders affirmed the St. Petersburg Development Outlook, which included actions to promote food security and sustainable food production.⁸⁰⁵⁵ In line with previous G20 summits, G20 leaders called for greater support to the Secure Nutrition Knowledge Platform and advocated for results-based agricultural research in subsequent years.

At the 2014 Brisbane Summit, G20 leaders called for “facilitating responsible investment in agriculture and food systems,” by emphasizing the importance of the Committee for World Food Security’s Principles for Responsible Investment in Agriculture and Food Systems.⁸⁰⁵⁶ G20 leaders also underscored the crucial role of the private sector in food distribution, stressing that investment in this sector is essential for strengthening global food security.

At the 2015 Antalya Summit, G20 leaders announced the G20 Action Plan on Food Security and Sustainable Food Systems.⁸⁰⁵⁷ The Action Plan emphasized the importance of increasing the global food supply.

At the 2016 Hangzhou Summit, G20 leaders reiterated their commitment to strengthening food security and advancing sustainable agricultural development.⁸⁰⁵⁸

⁸⁰⁵⁰ G20 Leaders Statement: The Pittsburgh Summit, G20 Information Centre (Toronto) 24 September 2009. Access Date: 10 March 2025. <https://www.g20.utoronto.ca/2009/2009communique0925.html>

⁸⁰⁵¹ G20 Leaders Statement: The Pittsburgh Summit, G20 Information Centre (Toronto) 24 September 2009. Access Date: 10 March 2025. <https://www.g20.utoronto.ca/2009/2009communique0925.html>

⁸⁰⁵² The G20 Toronto Summit Declaration, G20 Information Centre (Toronto) 27 June 2010. Access Date: 10 March 2025. <https://www.g20.utoronto.ca/2010/to-communique.html>

⁸⁰⁵³ Communiqué: G20 Leaders Summit, G20 Information Centre (Toronto) 4 November 2011. Access Date: 10 March 2025. <https://www.g20.utoronto.ca/2011/2011-cannes-communique-111104-en.html>

⁸⁰⁵⁴ G20 Leaders Declaration, G20 Information Centre (Toronto) 19 June 2012. Access Date: 5 March 2025. <http://www.g20.utoronto.ca/2012/2012-0619-loscabos.html>

⁸⁰⁵⁵ G20 Leaders' Declaration, G20 Information Centre (Toronto) 6 September 2013. Access Date: 5 March 2025. <http://www.g20.utoronto.ca/2013/2013-0906-declaration.html>

⁸⁰⁵⁶ G20 Food Security and Nutrition Framework, G20 Information Centre (Toronto) n.d. Access Date: 5 March 2025. http://www.g20.utoronto.ca/2014/g20_food_security_nutrition_framework.pdf

⁸⁰⁵⁷ G20 Action Plan on Food Security and Sustainable Food Systems, G20 Information Centre (Toronto) n.d. Access Date: 5 March 2025. <http://www.g20.utoronto.ca/2015/G20-Action-Plan-on-Food-Security-and-Sustainable-Food-Systems.pdf>

⁸⁰⁵⁸ G20 Leaders' Communiqué: Hangzhou Summit, G20 Information Centre (Toronto) 5 September 2016. Access Date: 5 March 2025. <http://www.g20.utoronto.ca/2016/160905-communique.html>

At the 2017 Hamburg Summit, G20 leaders supported sustainable agriculture, with a focus on rural areas.⁸⁰⁵⁹ G20 leaders also urged the enhancement of the Agricultural Market Information System to improve transparency in global food markets, as well as protecting and managing water-related ecosystems.

At the 2018 Buenos Aires Summit, G20 leaders emphasized their commitment to the G20 Food Security and Nutrition Framework, encouraging collaboration between public and private stakeholders to propel agricultural efficiency.⁸⁰⁶⁰

At the 2019 Osaka Summit, G20 leaders highlighted the importance of utilizing technologies such as information and communications and AI to improve agricultural productivity and sustainability.⁸⁰⁶¹

At the 2020 Riyadh Summit, G20 leaders reaffirmed their commitment to sustainable agriculture by endorsing the G20 Riyadh Statement to Enhance Implementation of Responsible Investment in Agriculture and Food Systems.⁸⁰⁶²

At the 2021 Rome Summit, G20 leaders committed to innovating agricultural solutions intended to end hunger and poverty while promoting long-term sustainable agriculture.⁸⁰⁶³

At the 2022 Bali Summit, G20 leaders committed to developing further measures toward food security, which included fertilizer shortage.⁸⁰⁶⁴ G20 leaders mentioned groups such as the Agricultural Market Information System, FAO and the World Bank Group to better enact commitments towards improving the supply and demand of fertilizers in the market.

At the 2023 New Delhi Summit, G20 leaders emphasized the importance of fertilizers in agricultural productivity, especially in efforts towards eliminating hunger and malnutrition.⁸⁰⁶⁵ G20 leaders looked towards encouraging equitable access to fertilizers through policies informed by the World Trade Organization's rules and regulations.

At the 2024 Rio de Janeiro Summit, G20 leaders committed to addressing fertilizer shortages as part of their commitment to agriculture and food production.⁸⁰⁶⁶ G20 leaders emphasized the importance of looking at fertilizer shortage through “strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.”

Commitment Features

This commitment's overarching welfare target is to address the challenges of global fertilizer shortages and affect food production and prices, and thus quality of life. The commitment identifies instruments by which the G20 aims to achieve this goal, while also addressing environmental concerns about soil health and water efficiency.

⁸⁰⁵⁹ G20 Leaders' Declaration: Shaping an Interconnected World, G20 Information Centre (Toronto) 8 July 2017. Access Date: 5 March 2025. <http://www.g20.utoronto.ca/2017/2017-G20-leaders-declaration.html>

⁸⁰⁶⁰ G20 Leaders' Declaration: Building Consensus for Fair and Sustainable Development, G20 Information Centre (Toronto) 1 December 2018. Access Date: 5 March 2025. <http://www.g20.utoronto.ca/2018/2018-leaders-declaration.html>

⁸⁰⁶¹ G20 Osaka Leaders' Declaration, G20 Information Centre (Toronto) 29 June 2019. Access Date: 5 March 2025. <http://www.g20.utoronto.ca/2019/2019-g20-osaka-leaders-declaration.html>

⁸⁰⁶² Leaders' Declaration, G20 Information Centre (Toronto) 21 November 2020. Access Date: 4 March 2025. <http://www.g20.utoronto.ca/2020/2020-g20-leaders-declaration-1121.html>

⁸⁰⁶³ G20 Rome Leaders' Declaration, G20 Information Centre (Toronto) 31 October 2021. Access Date: 4 March 2025. <http://www.g20.utoronto.ca/2021/211031-declaration.html>

⁸⁰⁶⁴ G20 Bali Leaders' Declaration, G20 Information Centre (Toronto) 16 November 2022. Access Date: 4 March 2025. <http://www.g20.utoronto.ca/2022/221116-declaration.html>

⁸⁰⁶⁵ G20 New Delhi Leaders' Declaration, G20 Information Centre (Toronto) 9 September 2023. Access Date: 4 March 2025. <http://www.g20.utoronto.ca/2023/230909-declaration.html>

⁸⁰⁶⁶ G20 Rio de Janeiro Leaders' Declaration, G20 Information Centre (Toronto) 18 November 2024. Access Date: 4 March 2025. <https://www.g20.utoronto.ca/2024/241118-declaration.html>

Definitions and Concepts

“Address” is understood to mean giving attention to a matter or deal with a problem.⁸⁰⁶⁷

“Challenge” refers to “something needing great mental or physical effort in order to be done successfully, or the situation of facing this kind of effort.”⁸⁰⁶⁸

“Fertilizer” refers to “a natural or chemical substance that is spread on the land or given to plants, to make plants grow well.”⁸⁰⁶⁹

“Shortage” refers to “a situation where there is not enough of something.”⁸⁰⁷⁰

“Strengthening” is understood to mean to “make or become stronger.”⁸⁰⁷¹ In the context of this commitment it refers to improving fertilizer production efforts, trade, and efficiency.

“Local” is understood to mean existing in a particular area.⁸⁰⁷² In the context of the commitment it refers to fertilizer production within the area of use.

“Increase” refers to “additional efforts to an old commitment” and not “adding new efforts in new ways.”⁸⁰⁷³

“Efficiency” is understood to mean achieving the largest amount of useful work with as little quantity as possible.⁸⁰⁷⁴

“Utilize” refers to “use something in an effective way.”⁸⁰⁷⁵

“Biofertilizers” is understood to mean the application of microorganisms as fertilizer.⁸⁰⁷⁶

“Need to” refers to an obligation; to have to have something, or to want something very much.⁸⁰⁷⁷

⁸⁰⁶⁷ Compliance Coding Manual for International Commitments, G20 Information Centre (Toronto) 12 November 2020. Access Date: 10 March 2025. https://www.g7.utoronto.ca/compliance/Compliance_Coding_Manual_2020.pdf

⁸⁰⁶⁸ Challenge, Cambridge Dictionary (Cambridge) n.d. Access Date: 14 March 2024.

<https://dictionary.cambridge.org/dictionary/english/challenge>

⁸⁰⁶⁹ Fertilizer, Cambridge Dictionary (Cambridge) n.d. Access Date: 14 March 2024.

<https://dictionary.cambridge.org/dictionary/english/fertilizer>

⁸⁰⁷⁰ Shortage, Cambridge Dictionary (Cambridge) n.d. Access Date: 14 March 2024.

<https://dictionary.cambridge.org/dictionary/english/shortage>

⁸⁰⁷¹ Compliance Coding Manual for International Commitments, G20 Information Centre (Toronto) 12 November 2020. Access Date: 10 March 2025. https://www.g7.utoronto.ca/compliance/Compliance_Coding_Manual_2020.pdf

⁸⁰⁷² Local, Cambridge Dictionary Cambridge (Cambridge) n.d. Access Date: 10 March 2025.

<https://dictionary.cambridge.org/dictionary/english/local>

⁸⁰⁷³ Compliance Coding Manual for International Commitments, G20 Information Centre (Toronto) 12 November 2020. Access Date: 11 March 2025. https://www.g7.utoronto.ca/compliance/Compliance_Coding_Manual_2020.pdf

⁸⁰⁷⁴ Efficiency, Cambridge Dictionary Cambridge (Cambridge) n.d. Access Date: 10 March 2025.

<https://dictionary.cambridge.org/dictionary/english/efficiency>

⁸⁰⁷⁵ Utilize, Cambridge Dictionary (Cambridge) n.d. Access Date: 13 March 2025.

<https://dictionary.cambridge.org/dictionary/english/utilize>

⁸⁰⁷⁶ A comprehensive overview of eco-friendly bio-fertilizers extracted from living organisms, National Library of Medicine (Bethesda) 18 October 2023. Access Date: 10 March 2025. <https://pmc.ncbi.nlm.nih.gov/articles/PMC10663222/>

⁸⁰⁷⁷ Compliance Coding Manual for International Commitments, G20 Information Centre (Toronto) 12 November 2020. Access Date: 13 March 2025. https://www.g7.utoronto.ca/compliance/Compliance_Coding_Manual_2020.pdf

“Improve” is defined as “to get better, or to make something better.”⁸⁰⁷⁸ In a G20 context, when a commitment states that it will “improve” it should be interpreted to mean that old initiatives will be updated. It should not be interpreted to mean a new initiative.⁸⁰⁷⁹

“Soil health” is defined as the continued capacity for soil to function as an ecosystem that sustains plant life.⁸⁰⁸⁰

“Minimize” refers to reducing “something to the least possible level or amount.”⁸⁰⁸¹

“Water pollution” is defined as the “contamination of fresh water by pollutants, i.e., human and/or animal wastes, agricultural pesticides and fertilizers, industrial toxic waste, etc.”⁸⁰⁸²

General Interpretive Guidelines

This commitment identifies six criteria by which the G20 aims to address the challenges of global fertilizer shortages by 1) strengthening local production of fertilizers; 2) engaging in international fertilizer trade; 3) increasing fertilizer efficiency; 4) using biofertilizers; 5) addressing environmental concerns about soil health; and 6) addressing concerns about water efficiency.

Full compliance, or a score of +1, will be given to a G20 member that takes strong actions five or more of the criteria. Strong actions include policy, legal, financial/fiscal/monetary, human resources support, and active international cooperation.

Partial compliance, or a score of 0, will be assigned to a G20 member that takes strong action in three of the six criteria, or weak action in at least four criteria. Weak actions include attendance without evidence of active participation in international forums, verbal or written reiteration of support, and signing memorandums of understanding with no tangible backing such as funds.

Non-compliance, or a score of –1, will be assigned to a G20 member that takes action two or fewer criteria, or takes actions directly and explicitly antithetical to the commitment. Antithetical actions include halting funding schemes for fertilizer research, rescinding support for previous verbal or written initiatives, and withdrawing from agreements involving implementation plans for the use of fertilizers or bio fertilizers.

Scoring Guidelines

–1	The G20 member took strong action to address fertilizer challenges in two or fewer or weak action in three of the six criteria: 1) strengthening local production of fertilizers; 2) engaging in international fertilizer trade; 3) increasing fertilizer efficiency; 4) using biofertilizers; 5) addressing environmental concerns about soil health; and 6) addressing concerns about water efficiency; or taken actions directly and explicitly antithetical to the commitment.
0	The G20 member took strong action in three criteria or weak action in at least four of the six criteria.
+1	The G20 member took strong action in five or more criteria.

Compliance Director: Therese Angeline Reyes
Lead Analyst: Tisha Banerjee

⁸⁰⁷⁸ Improve, Cambridge Dictionary (Cambridge) n.d. Access Date: 13 March 2025.

<https://www.oxfordreference.com/display/10.1093/oi/authority.20110803121301579>

⁸⁰⁷⁹ Compliance Coding Manual for International Commitments, G20 Information Centre (Toronto) 12 November 2020. Access Date: 13 March 2025. https://www.g7.utoronto.ca/compliance/Compliance_Coding_Manual_2020.pdf

⁸⁰⁸⁰ Soil Health, Natural Resources Conservation Service (Washington D.C.) n.d. Access Date: 10 March 2025. <https://www.nrcs.usda.gov/conservation-basics/natural-resource-concerns/soils/soil-health>

⁸⁰⁸¹ Minimize, Cambridge Dictionary (Cambridge) n.d. Access Date: 13 March 2025. <https://dictionary.cambridge.org/english/minimize>

⁸⁰⁸² Water pollution, Oxford Reference (Oxford) n.d. Access Date: 13 March 2025. <https://www.oxfordreference.com/display/10.1093/oi/authority.20110803121301579>

Argentina: 0

Argentina has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 17 February 2025, the Ministry of Agriculture, Livestock and Fisheries of the Ministry of Economy of Argentina announced a comprehensive update of the provisions governing fertilizers and agricultural amendments within the framework of Law No. 20,466.⁸⁰⁸³ This update makes importing certified products easier by simplifying the registration procedures, facilitating a greater integration in the international fertilizer trade.

On 10 March 2025, Secretary Sergio Iraeta of the Secretariat of Agriculture, Livestock, and Fisheries announced the reduction of import tariffs on fertilizers at ExpoAgro.⁸⁰⁸⁴ This action aims to strengthen the existing international fertilizer trade relations between Argentina and foreign countries, increasing the supply of cost-effective fertilizers available to Argentina's agriculture industry.

On 3 April 2025, the Ministry of Deregulation and State Transformation announced the simplification of import and export rules for fertilizers under the National Service of Agrifood Health and Quality.⁸⁰⁸⁵ This measure aims to enhance the quality of agricultural products and facilitate Argentina's integration into the international fertilizer market.

On 7 May 2025, the National Agricultural Technology Institute, under the Ministry of Economy, announced that it was working on the development of a new biofertilizer.⁸⁰⁸⁶ The new biofertilizer, developed in cooperation with the Ovobrand Biogas Plant, promotes the development of sustainable agriculture.

Argentina has partially complied with its commitment to address the challenges of fertilizer shortages. It has taken action in four of the six criteria through exhibiting commitments regarding facilitating international fertilizer trade, making fertilizers available for local agricultural production, and the domestic production of a new biofertilizer for domestic use. Argentina has significantly simplified the process of importing fertilizers into the country, thus increasing its presence in the global fertilizer trade. Its partnership with private sector companies in the production of biofertilizers also helps to alleviate fertilizer shortages within the country. However, Argentina has not taken action on other important commitment criteria, increasing fertilizer efficiency while taking strong action to improve soil health and minimize water pollution.

Thus, Argentina receives a score of 0.

Analyst: Alison Haoying Yu

⁸⁰⁸³ El Gobierno Nacional simplifica normativa de fertilizantes para fortalecer el sector agroindustrial, La Secretaría de Agricultura, Ganadería y Pesca del Ministerio de Economía (Buenos Aires) 17 February 2025. Translation provided by Google Translate. Access Date: 22 March 2025. <https://www.argentina.gob.ar/noticias/el-gobierno-nacional-simplifica-normativa-de-fertilizantes-para-fortalecer-el-sector>

⁸⁰⁸⁴ El Gobierno Nacional presente en ExpoAgro, La Secretaría de Agricultura, Ganadería y Pesca del Ministerio de Economía (Buenos Aires) 10 March 2025. Translation provided by Google Translate. Access Date: 24 March 2025. <https://www.argentina.gob.ar/noticias/el-gobierno-nacional-presente-en-expoagro>

⁸⁰⁸⁵ SENASA simplificó procesos para la importación y exportación de fertilizantes, Ministerio de Desregulación y Transformación del Estado (Buenos Aires) 3 April 2025. Translation Provided by Google Translate. Access Date: 27 June 2025. <https://www.argentina.gob.ar/noticias/senasa-simplifico-procesos-para-la-importacion-y-exportacion-de-fertilizantes>

⁸⁰⁸⁶ El INTA trabaja en la producción de un biofertilizante, Instituto Nacional de Tecnología Agropecuaria (Buenos Aires) 7 May 2025. Translation Provided by Google Translate. Access Date: 27 June 2025. <https://www.argentina.gob.ar/noticias/el-inta-trabaja-en-la-produccion-de-un-biofertilizante>

Australia: 0

Australia has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 3 January 2025, the Albanese Labor Government and the Tasmanian Government invested AUD2.43 million to promote better land use of Australia's carbon-rich soil.⁸⁰⁸⁷ The funding ties to the commitment as carbon-rich soil promotes the fertilization of arable land. This promotes sustainable agriculture and reduces fertilizer shortages through natural alternatives.

On 1 March 2025, Australia's Grains Research Development Corporation commenced the "Addressing emerging nutrient limitations in the Australian grains industry for improved fertilizer management of potassium (K)" project which supports improved fertilizer efficiency.⁸⁰⁸⁸

On 4 March 2025, the Australian Bureau of Agricultural and Resource Economics and Sciences (ABARES) held ABARES's Outlook Conference 2025 where a session was held on discussing the security and availability of essential inputs including fertilisers for bolstering the resilience of farming communities and securing them for long-term development.⁸⁰⁸⁹ The conference also featured speakers from government ministers as well as private partners. This initiative advances Australia's commitment to strengthening local supply chains.

On 1 April 2025, Australia began the "Fostering the adoption of variable rate fertilizer application for improved nutrient use efficiency" project.⁸⁰⁹⁰ This project improves nutrient use efficiency through the adoption of Variable Rate technology (VRT).

On 30 April 2025, the Grains Research Development Corporation began the development of an integrated "Soil Health Framework" alongside the Commonwealth Scientific and Industrial Research Organization.⁸⁰⁹¹ This project seeks to provide a standardized framework for Australian producers to quantify, monitor and report soil health against relevant benchmarks, in order to provide data to inform future policies and practices aimed at optimizing soil health.

On 21 July 2025, the Australian Government Grains Research and Development Corporation announced a new AUD39 million initiative into low-emission farming.⁸⁰⁹² This funding is part of the five-year national Low Emissions Intensity Farming System (LEIFS) program. Among its sustainability goals, LEIFS aims to improve nitrogen and other fertilizer efficiency.

⁸⁰⁸⁷ Carbon-rich Tassie soil to be mapped for national framework, Minister of Agriculture, Fisheries and Forestry (Canberra) 3 January 2025. Access Date: 31 October 2025. <https://minister.agriculture.gov.au/collins/media-releases/tasmania-soil-mapped-framework>

⁸⁰⁸⁸ Addressing emerging nutrient limitations in the Australian grains industry for improved fertiliser management of potassium (K), Australian Government Grains Research and Development Corporation (Canberra) 1 March 2025. Access Date: 3 September 2025. <https://grdc.com.au/grdc-investments/investments/investment?code=UOQ2503-008RTX>

⁸⁰⁸⁹ ABARES Outlook 2025 Insights for Action: Fostering Growth in a Changing World, Department of Agriculture, Fisheries and Forestry (Canberra) 4 March 2025. Access Date: 11 July 2025. <https://www.agriculture.gov.au/sites/default/files/documents/outlook-2025-a4-web-program.pdf>

⁸⁰⁹⁰ Fostering the adoption of variable rate fertiliser application for improved nutrient use efficiency,), Australian Government Grains Research and Development Corporation (Canberra) 1 April 2025. Access Date: 3 September 2025. <https://grdc.com.au/grdc-investments/investments/investment?code=SPA2504-002SAX>

⁸⁰⁹¹ Development of a Soil Health Framework for Australian agricultural production systems), Australian Government Grains Research and Development Corporation (Canberra) 30 April 2025. Access Date: 13 October 2025. <https://grdc.com.au/grdc-investments/investments/investment?code=CSP2504-015RTX>

⁸⁰⁹² \$39M to help grain growers reduce on-farm emissions Australian Government Grains Research and Development Corporation (Canberra) 21 July 2025. Access Date: 30 September 2025. [https://groundcover.grdc.com.au/grdc/announcements/\\$39m-to-help-grain-growers-reduce-on-farm-emissions](https://groundcover.grdc.com.au/grdc/announcements/$39m-to-help-grain-growers-reduce-on-farm-emissions)

On 25 August 2025, Agricultural Innovation Australia (AIA) received an AUD6.4 million grant to improve agricultural greenhouse gas emissions calculators.⁸⁰⁹³ These calculators are vital tools in managing emissions from agricultural inputs such as nitrogen fertilizers. This action utilizes technologies to promote sustainable fertilizer usage.

On 1 September 2025, Minister for Agriculture, Fisheries and Forestry Julie Collins sent an address to farmers expressing gratitude for the significant progress the country has made in implementing environmentally sustainable practices in local agriculture.⁸⁰⁹⁴ In the address, Collins mentions Australia's lower use of fertilizer relative to other nations. The use of less fertilizers encourages sustainable agriculture by decreasing carbon emissions.

Australia has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. Australia has taken action through the ABARES Outlook Conference to facilitate discussion on bolstering local production of fertilizers. It has also taken action in the form of government policies, actions or agreements implemented towards soil improvement domestically. However, it has not taken action to engage in international fertilizer trade, promote the use of biofertilizers or address concerns about water efficiency.

Thus, Australia receives a score of 0.

Analyst: Chebzaad Farid Singh

Brazil: +1

Brazil has fully complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 3 December 2024, President Luiz Inácio Lula da Silva announced a BRL546.6 billion investment to boost sustainable agro-industrial chains for food, nutritional and energy security.⁸⁰⁹⁵ This initiative aims to boost agribusiness by three per cent per year from 2024-2026, including strengthening and modernizing of fertilizer and biofertilizer production chains.

On 6 December 2024, a MAPA-led Brazilian mission to Angola, coordinated by Minister of Agriculture and Livestock Carlos Fávaro, ended with two bi-lateral instruments signed. Both countries formally agreed to cooperation in agricultural research and strengthening relations in the agricultural and agro-industrial sectors between both government and private-sector partners.⁸⁰⁹⁶ The Brazilian delegation highlighted Angola's potential in producing nitrogen fertilizers and their interest in acquiring it as well as Angola's benefit from usage of Brazilian agricultural technology and research.

⁸⁰⁹³ Albanese Labor Government delivering new support for farmers to improve emissions accounting, Minister of Agriculture, Fisheries and Forestry (Canberra) 25 August 2025. Access Date: 30 October 2025. <https://minister.agriculture.gov.au/collins/media-releases/emissions-calculator>

⁸⁰⁹⁴ Address to Farmers for Climate Action, Canberra, Minister of Agriculture, Fisheries and Forestry (Canberra) 1 September 2025. Access Date: 31 October 2025. <https://minister.agriculture.gov.au/collins/speeches-and-transcripts/address-to-farmers-for-climate-action>

⁸⁰⁹⁵ Governo Federal anuncia R\$ 546,6 bilhões em investimentos para impulsionar cadeias agroindustriais sustentáveis, Ministério da Agricultura e Pecuária (Brasília) 3 December 2024. Translation provided by Google Translate. Access Date: 28 March 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/governo-federal-anuncia-r-546-6-bilhoes-em-investimentos-para-impulsionar-cadeias-agroindustriais-sustentaveis>

⁸⁰⁹⁶ Missão oficial em Angola registra formalização de parcerias e abertura de oportunidades para o setor agropecuário, Ministério da Agricultura e Pecuária (Brasília) 12 December 2024. Translation provided by Google Translate. Access Date: 28 March 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/missao-oficial-em-angola-registra-formalizacao-de-parcerias-e-abertura-de-oportunidades-para-o-setor-agropecuario>

On 12 December 2024, the Brazilian Ministry of Agriculture and Livestock (MAPA) and the Government of the province of Mendoza, Argentina sign an agreement to foster cooperation in strategic areas of agribusiness and optimizing trade between the two countries.⁸⁰⁹⁷ This agreement took place during a seminar hosted by the Inter-American Institute for Cooperation on Agriculture, where Brazilian and Argentine representatives reinforced their commitment to regional cooperation in agricultural inputs and fertilizers made during the 2024 G20 Summit.

On 12 February 2025, Minister of Agriculture and Livestock Carlos Fávaro received a Russian delegation under the International Municipalities of BRICS forum to discuss agriculture, food security and fertilizers.⁸⁰⁹⁸ Both countries discussed cooperation in the fertilizer sector, with a focus on new Russian technologies and the need for fertilizer cooperation given Russia's role as Brazil's main supplier of fertilizers.

On 16 April 2025, Minister Fávaro participated in a bilateral meeting with the Minister of Agriculture of Iran Gholamreza Nouri Ghezeljeh.⁸⁰⁹⁹ The primary topic of the meeting was bilateral trade, with both delegations discussing the expansion of trade in fertilizers, especially urea.

On 21 April 2025, the Ministry of Foreign Affairs and the Ministry of Agriculture and Livestock took part in the 17th edition of the Salon International de l'Agriculture au Maroc, a large agricultural fair in Morocco.⁸¹⁰⁰ The Brazilian stand, which included partners from the fertilizer industry, aimed to strengthen its position in the North African agricultural market and create new opportunities for Brazilian exports.

On 5 May 2025, MAPA seized 336 tons of illegally distributed organic fertilizers.⁸¹⁰¹ Distributing organic fertilizers without registration from the Ministry is harmful to soil health, as they may have imbalanced formulations that can harm soil health and contain biological contaminants. The suspension of the company that distributed the illegal organic fertilizers helps strengthen local production of fertilizers, ensuring the quality of products distributed to local producers while addressing environmental concerns to soil health due to the potential for biological contaminants in the fertilizer.

On 30 June 2025, the Minister of Agriculture and Livestock Carlos Fávaro met with the Governor of the Argentine province of Mendoza Alfredo Cornejo to discuss the trade of fertilizers between Argentina and Brazil, especially potassium fertilizers.⁸¹⁰² The meeting reinforces both countries' commitments to the fertilizer trade, reiterating Argentina's strategic importance to Brazil and Mendoza's interest in international investment

⁸⁰⁹⁷ Brasil e Argentina avançam na cooperação para fertilizantes e insumos agrícolas em seminário bilateral, Ministério da Agricultura e Pecuária (Brasília) 17 December 2024. Translation provided by Google Translate. Access Date: 28 March 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/brasil-e-argentina-avancam-na-cooperacao-para-fertilizantes-e-insumos-agricolas-em-seminario-bilateral>

⁸⁰⁹⁸ Ministro Carlos Fávaro dialoga com delegação russa no Mapa sobre o Fórum IMBRICS, Ministério da Agricultura e Pecuária (Brasília) 13 February 2025. Translation provided by Google Translate. Access Date: 28 March 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/ministro-carlos-favaro-dialoga-com-delegacao-russa-no-mapa-sobre-o-forum-imbrics>

⁸⁰⁹⁹ Ministro Carlos Fávaro se reúne com ministro da Agricultura do Irã para ampliar cooperação comercial, Ministério da Agricultura e Pecuária (Brasília) 17 April 2025. Translation provided by Google Translate. Access Date: 14 May 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/ministro-carlos-favaro-se-reune-com-ministro-da-agricultura-do-ira-para-ampliar-cooperacao-comercial>

⁸¹⁰⁰ Brasil amplia presença no agronegócio africano com participação na SIAM 2025, no Marrocos, Ministério da Agricultura e Pecuária (Brasília) 29 April 2025. Translation provided by Google Translate. Access Date: 14 May 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/brasil-amplia-presenca-no-agronegocio-africano-com-participacao-na-siam-2025-no-marrocos>

⁸¹⁰¹ Operação apreende 336 toneladas de fertilizante orgânico sem registro no Mapa no interior de SP Ministério da Agricultura e Pecuária (Brasília) 5 May 2025. Translation Provided by Google Translate. Access Date: 28 June 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/operacao-apreende-336-toneladas-de-fertilizante-organico-sem-registro-no-mapa-no-interior-de-sp>

⁸¹⁰² Ministro Fávaro recebe governador de Mendoza para tratar de comércio bilateral de fertilizantes, Ministério da Agricultura e Pecuária (Brasília) 30 June 2025. Translation provided by Google Translate. Access Date: 10 July 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/ministro-favaro-recebe-governador-de-mendoza-para-tratar-de-comercio-bilateral-de-fertilizantes>

to develop its potassium production. The partnership represents a concrete initiative toward reducing Brazil's external dependence on potassium and stabilizing agricultural production costs.

On 30 June 2025, the Brazilian Federal Government presented the Plano Safra da Agricultura Familiar (Family Farming Harvest Plan), allocating BRL89 billion toward rural credit, public procurement, agricultural insurance, technical assistance, minimum price guarantees and other programs.⁸¹⁰³ Part of the plan includes the Programa Nacional de Redução de Agrotóxicos (National Pesticide Reduction Program), seeking to promote safer and healthier agricultural practices. Included is a commitment toward expanding the use of bio-inputs, such as biofertilizers. The plan aims to reduce costs for agricultural producers and promoting sustainable bio-inputs.

On 1 July 2025, the Brazilian Federal Government launches the Plano Safra (Harvest Plan) 2025/2026, which allocates BRL516.2 billion to boost Brazilian agriculture.⁸¹⁰⁴ The plan primarily focuses on expanding access to credit for rural producers, seeking to reduce agricultural production costs. The plans include lower interest for producers who adopt sustainable practices, such as adopting bio-inputs and biofertilizers.

On 1 September 2025, the Ministry of Agrarian Development and Family Farming (MDA) participated in the Expointer agriculture fair, seeking to promote the MDA's agricultural production policies, encourage innovation, and connect producers.⁸¹⁰⁵ During the fair, the MDA held meetings titled "Scenarios and Opportunities in Bioinputs," where discussions were held on encouraging greater sustainability and less external dependence in bio-inputs.

On 9 September 2025, the MDA coordinated a large meeting of Brazilian cooperatives, associations, and centres linked to family farming to discuss various topics, including bio-inputs.⁸¹⁰⁶ During the meeting, the Government announced several bio-input initiatives: the signing of Decentralized Execution Terms with universities under the Bio-inputs Strategy and Network and the launch of the Manual of Good Practices in Bio-inputs. The announcements reinforce the Brazilian Government's commitment to bio-input innovation and sustainable practice, as well as its coordination with cooperatives and other agricultural partners.

On 10 September 2025, Deputy Agricultural Minister Cleber Oliveira Soares and the UK Special Representative for Nature Ruth Davis developed a memorandum of understanding that aims to enhance fertilizer production by making it more efficient and sustainable.⁸¹⁰⁷ The partnership aims to do so through collaborative research and development of fertilizers.

On 26 September 2025, the Secretariat of Family Farming and Agroecology (SAF) held meetings with civil society organizations under the "From Land to Table Brazil" call for proposals.⁸¹⁰⁸ The meetings are part of a

⁸¹⁰³ Plano Safra 2025/2026, Ministério da Agricultura e Pecuária (Brasília) 30 June 2025. Translation provided by Google Translate. Access Date: 15 July 2025. <https://www.gov.br/mda/pt-br/noticias/2025/06/plano-safra-2025-2026>

⁸¹⁰⁴ <https://www.gov.br/agricultura/pt-br/assuntos/noticias/governo-federal-lanca-plano-safra-2025-2026-com-r-516-2-bilhoes-para-impulsionar-o-agro-brasileiro>, Ministério da Agricultura e Pecuária (Brasília) 30 June 2025. Translation provided by Google Translate. Access Date: 15 July 2025. <https://www.gov.br/agricultura/pt-br/assuntos/noticias/governo-federal-lanca-plano-safra-2025-2026-com-r-516-2-bilhoes-para-impulsionar-o-agro-brasileiro>

⁸¹⁰⁵ MDA reforça presença na Expointer e destaca papel estratégico da agricultura familiar, Ministério do Desenvolvimento Agrário e Agricultura Familiar (Brasília) 29 August 2025. Translation provided by Google Translate. Access Date: 29 September 2025. <https://www.gov.br/mda/pt-br/noticias/2025/08/mda-reforca-presenca-na-expointer-e-destaca-papel-estrategico-da-agricultura-familiar>

⁸¹⁰⁶ MDA reforça compromisso com o cooperativismo durante encontro em Brasília, Ministério da Agricultura e Pecuária (Brasília) 9 September 2025. Translation provided by Google Translate. Access Date: 29 September 2025. <https://www.gov.br/mda/pt-br/noticias/2025/09/mda-reforca-compromisso-com-o-cooperativismo-durante-encontro-em-brasilia>

⁸¹⁰⁷ UK and Brazil to show global leadership on fertilisers sustainability, Government of the UK Environment Agency (London) 10 September 2025. Access Date: 27 October 2025. <https://www.gov.uk/government/news/uk-and-brazil-to-show-global-leadership-on-fertilisers-sustainability>

⁸¹⁰⁸ Da Terra à Mesa Brasil: 45 OSCs se preparam para iniciar projetos de transição agroecológica, Ministério do Desenvolvimento Agrário e Agricultura Familiar (Brasília) 26 September 2025. Translation provided by Google Translate. Access Date: 29 September 2025. <https://www.gov.br/mda/pt-br/noticias/2025/09/da-terra-a-mesa-brasil-45-oscs-se-preparam-para-iniciar-projetos-de-transicao-agroecologica>

larger framework of 45 initiatives now entering the implementation phase, including projects to multiply native bio-inputs. The meetings are aimed to ensure civil society organizations, originating from across Brazil and include cooperatives, associations, and collectives, are included in agricultural policy discussions. They also reinforce SAF's commitment to strengthening the agroecological transition in Brazil.

Brazil has fully complied with its commitment to combat fertilizer shortages through efforts to strengthen local production, engage in trade, increase fertilizer efficiency and encourage biofertilizer usage while protecting soil health and minimize water pollution. Brazil has taken steps to improve fertilizer relations and exchange fertilizer research with various countries that are, or potentially can become, large fertilizer producers. It has put great effort in expanding local production and research and development of fertilizers through investments and financial incentives, which also encourages biofertilizer as an alternative to traditional fertilizers. To complement this push, Brazil has put effort into regulating biofertilizer production, distribution and usage, with the aim of accounting for environmental impacts.

Thus, Brazil receives a score of +1.

Analyst: Jackie Wang

Canada: 0

Canada has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 22 November 2024, Minister of Agriculture and Agri-Food Lawrence MacAulay announced CAD7.2 million into four AgriInnovative Program projects.⁸¹⁰⁹ The investment aims to aid strengthen local production of fertilizers and facilitate the production of innovative and more sustainable alternatives.

On 15 January 2025, Minister MacAulay and Saskatchewan's Minister of Agriculture Daryl Harrison announced CAD9.4 million in funding for crop-related research.⁸¹¹⁰ Funded research includes research into fertilizer management.

On 19 February 2025, Minister MacAulay and Saskatchewan Agriculture Minister Daryl Harrison reaffirmed their support for the Saskatchewan Crop Insurance Corporation (SCIC) through continued funding for their 2025 Crop Insurance Program.⁸¹¹¹ The SCIC-led Program aims to aid farmers with policy and program offerings to improve the livestock sector of Canada. In particular, the SCIC is working on remote sensing technologies allowing farmers to measure soil moisture and plant growth.

On 26 February 2025, the Canadian Food Inspection Agency released a list of amendments to the inspection process.⁸¹¹² Among the amendments were clarifications on the conditions for exporting fertilizer and fertilizer supplements. By clarifying regulations, Canada can better participate in the international fertilizer market.

⁸¹⁰⁹ Minister MacAulay announces funding for innovations in sustainable agricultural technology, Government of Canada (Ottawa) 22 November 2024. Access Date: 21 April 2025. <https://www.canada.ca/en/agriculture-agri-food/news/2024/11/minister-macaulay-announces-funding-for-innovations-in-sustainable-agricultural-technology.html>

⁸¹¹⁰ Governments of Canada and Saskatchewan Invest in Crop Research, Government of Saskatchewan (Regina) 15 January 2025. Access Date: 30 September 2025. <https://www.saskatchewan.ca/government/news-and-media/2025/january/15/governments-of-canada-and-saskatchewan-invest-in-crop-research>

⁸¹¹¹ Governments of Canada and Saskatchewan announce continued commitment through the 2025 Crop Insurance Program, Government of Canada (Ottawa) 19 February 2025. Access Date: 21 April 2025. <https://www.canada.ca/en/agriculture-agri-food/news/2025/02/governments-of-canada-and-saskatchewan-announce-continued-commitment-through-the-2025-crop-insurance-program.html>

⁸¹¹² Regulations Amending Certain Canadian Food Inspection Agency Regulations (Miscellaneous Program): SOR/2025-47, Canadian Gazette (Ottawa) March 12 2025. Access Date 30 September 2025. <https://gazette.gc.ca/rp-pr/p2/2025/2025-03-12/html/sor-dors47-eng.html>

On 7 March 2025, Minister MacAulay announced an interest-free limit on the Advance Payments Program at CDN250,000 for 2025.⁸¹¹³ The initiative aims to support farmers in purchasing agriculture inputs such as fertilizers and fuels.⁸¹¹⁴

On 16 June 2025, Canada unveiled Agriculture and Agri-Food Canada's 2025–26 Departmental Plan.⁸¹¹⁵ As part of the new plan, the Department will continue its work with the agricultural sector to reduce fertilizer emissions, thus promoting clean and efficient fertilizers.

On 23 July 2025, Agriculture and Agri-Food Canada Director General Sophie Beecher attended the Soil for our Future conference in Winnipeg.⁸¹¹⁶ The conference invited professionals with an interest in soil such as scientists and policy makers to listen to Beecher talk about the soil health strategy that is in its early days of development.

On 3 September 2025, Agriculture and Agri-Food Canada invested CAD14.6 million to help farmers fund improvements to their farmlands.⁸¹¹⁷ The funding received by farmers as part of the Resilient Agricultural Landscape Program can be used to gain access to fertilizers or technologies to improve soil quality.

On 8 September 2025, Agriculture and Agri-Food Canada invested CAD4.77 million to support the 48 research and innovation projects of 20 companies through the Ontario Agri-Food Research Initiative.⁸¹¹⁸ The research projects that are funded can utilize technology to nourish crops accurately in arable land. These projects aim to help agricultural industries grow despite the U.S. tariffs.

Canada has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. Canada has taken strong action in strengthening local production of fertilizers, increasing fertilizer efficiency and in addressing environmental concerns about soil health through investments, payment programs and verbal affirmations. However, it has not taken action in the other components of the commitment being engaging in international fertilizer trade, using biofertilizers and addressing concerns about water efficiency.

Thus, Canada receives a score of 0.

Analyst: Tatum Hillier

⁸¹¹³ Minister MacAulay announces interest-free limit under the Advance Payments Program will be set at \$250,000 for 2025, Agriculture and Agri-Food Canada (Ottawa) 7 March 2025. Access Date: 9 May 2025. <https://www.canada.ca/en/agriculture-agri-food/news/2025/03/minister-macaulay-announces-interest-free-limit-under-the-advance-payments-program-will-be-set-at-250000-for-2025.html>

⁸¹¹⁴ Chapter 3: Lowering Everyday Costs, Department of Finance Canada (Ottawa) 16 April 2024. Access Date: 9 May 2025. <https://budget.canada.ca/2024/report-rapport/chap3-en.html#s3-1>

⁸¹¹⁵ Agriculture and Agri-Food Canada's 2025–26 Departmental Plan, Agriculture and Agri-Food Canada (Ottawa) 16 June 2025. Access Date: 30 September 2025. <https://agriculture.canada.ca/en/departement/transparency/departemental-plan/2025-26-departemental-plan>

⁸¹¹⁶ Federal government supports soil health strategy, Manitoba Co-Operator (Manitoba) 7 August 2025. Access Date: 31 October 2025. <https://www.manitobacooperator.ca/news-opinion/news/federal-government-supports-soil-health-strategy/>

⁸¹¹⁷ Canada and Ontario investing \$14.6 million to help farmers make improvements to farmlands, Government of Canada (Toronto) 3 September 2025. Access Date: 29 October 2025. <https://www.canada.ca/en/agriculture-agri-food/news/2025/09/canada-and-ontario-investing-146-million-to-help-farmers-make-improvements-to-farmlands.html>

⁸¹¹⁸ Canada and Ontario investing \$4.77 million in agri-food research, Government of Canada (Toronto) 8 September 2025. Access Date: 1 November 2025. <https://www.canada.ca/en/agriculture-agri-food/news/2025/09/canada-and-ontario-investing-477-million-in-agri-food-research.html>

China: 0

China has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 9 December 2024, the Ministry of Agriculture and Rural Affairs announced the completion of the third national soil census.⁸¹¹⁹ This soil census plays a role in supporting China's agricultural modernization and ecological sustainability, identifying soil degradation issues and supporting measures to protect the ecological functions of soil and mitigate the impact of urbanization and industrialization on agricultural land.

On 14 February 2025, the Ministry of Agriculture and Rural Affairs issued a notice on agricultural technology innovations set from 2024-2028.⁸¹²⁰ The innovations aim to advance biotechnology and information technology, improve the quality of soil health, to cultivate self-reliance in the agricultural sector of the nation.

On 17 February 2025, Vice Premier Liu Guozhong underscored the importance of farmland management including managing water and fertilizers scientifically in preparation for spring farming.⁸¹²¹ In addition, he stressed the need to ensure the supply of agricultural inputs including fertilizers.

On 24 February 2025, the Ministry of Agriculture and Rural Affairs unveiled a policy blueprint for rural development.⁸¹²² The blueprint aims to revitalize the rural agricultural scene, fortify food security and cultivate agricultural productivity by empowering local farmers, expanding infrastructure, developing efficient harvesting machinery, and cultivating the seed industry to breed more high yield seeds.

On 11 June 2025, Vice Minister of Agriculture and Rural Affairs Zhang Zhili met with Grégoire Mutshail Mutomb Kangaji, Minister of Agriculture and Food Security of the Democratic Republic of the Congo (DRC).⁸¹²³ The representatives discussed deepening collaboration between the two nations regarding agricultural endeavours through a Memorandum of Understanding. The cooperation between China and the DRC aims to promote soil health and utilize fertilizers to enhance soil productivity in the DRC and its neighboring countries.

On 27 July 2025, China released a joint guideline to boost consumption of agricultural products through efforts to advance the combination of agriculture, culture and tourism to inspire new consumption spaces.⁸¹²⁴ The efforts include using agricultural products effectively to meet demand, elevate standards for domestic food production and boosting production, supply and marketing of agricultural products.

⁸¹¹⁹ Soil census to provide insight for agricultural practices, Ministry of Agriculture and Rural Affairs of the People's Republic of China (Beijing) 9 December 2024. Access Date: 27 March 2025. http://english.moa.gov.cn/news_522/202412/t20241210_301401.html

⁸¹²⁰ China pushes for high-level self-reliance in agricultural tech, Ministry of Agriculture and Rural Affairs of the People's Republic of China (Beijing) 14 February 2025. Access Date: 18 April 2025. http://english.moa.gov.cn/news_522/202502/t20250220_301456.html

⁸¹²¹ Chinese vice premier stresses preparation for spring farming, The State Council of the People's Republic of China (Beijing) 17 February 2025. Access Date: 16 November 2025. https://english.www.gov.cn/news/202502/17/content_WS67b32046c6d0868f4e8efb2d.html

⁸¹²² China's new push for rural reform, revitalization, Ministry of Agriculture and Rural Affairs of the People's Republic of China (Beijing) 24 February 2025. Access Date: 13 May 2025. http://english.moa.gov.cn/news_522/202502/t20250227_301460.html

⁸¹²³ Vice Minister Zhang Zhili Meets with Agriculture Minister of DRC, Ministry of Agriculture and Rural Affairs of the People's Republic of China (Beijing) 13 June 2025. Access Date: 21 June 2025. http://english.moa.gov.cn/news_522/202506/t20250616_301509.html

⁸¹²⁴ China to promote consumption of agricultural products, Ministry of Agriculture and Rural Affairs of the People's Republic of China (Beijing) 27 July 2025. Access Date: 2 October 2025. https://english.moa.gov.cn/news_522/202507/t20250727_301522.html

On 10 August 2025, the Ministry of Agriculture and Rural Affairs announced revised requirements for the labeling and manuals of pesticide products.⁸¹²⁵ These new requirements aim to promote the safe use of agrochemicals and improve the production processes. The new regulation will be put into effect starting 1 January 2026.

China has partially complied with the commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. While China has taken moderate action in strengthening the local production of fertilizers, enhancing fertilizer efficiency and addressing concerns about soil health and water efficiency, it has not taken strong action in the other components of the commitment.

Thus, China receives a score of 0.

Analyst: Nicole Chi Yan Tsang

France: 0

France has partially complied with its commitment to address the challenges of fertilizer shortages through strengthening local production, engaging in international trade, take efforts to increase fertilizer efficiency, encourage the domestic use of biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 16 December 2024, France published several national analysis highlighting tools such as impact-linked loans, carbon credit programs and payments for environmental services.⁸¹²⁶ These mechanisms support adopting sustainable agricultural practices and contribute to improved soil health and resource efficiency for agricultural inputs including fertilizers across the sector.

On 18 February 2025, the Council of State announced that it recognized the new standard for High Value Evaluation.⁸¹²⁷ As part of the new standard, farms are encouraged to adopt environmentally friendly practices in several areas, including fertilization.

On 10 March 2025, France launched its third Plan for National Adaptation and Climate Change to prepare for a +4 °C scenario by 2100.⁸¹²⁸ The plan includes concrete actions across territories, with an emphasis on adaptation in sectors like agriculture and land management. It highlights sustainable water use, the protection of soil health and the financing of local climate resilience efforts, supporting long-term strategies to mitigate water pollution and preserve natural resources. The initiative builds on existing actions including a climate diagnostic tool for organic farming and the use of organic fertilizers, and a national strategy supporting plant-based protein sectors aligning with ecological planning objects including the reduction of nitrogen fertilizers.

⁸¹²⁵ China Tightens Pesticide Label Regulations Ahead of 2026 Implementation, Global Agriculture (Beijing) 10 August 2025. Access Date: 31 October 2025. <https://www.global-agriculture.com/crop-protection/china-tightens-pesticide-label-regulations-ahead-of-2026-implementation/#:~:text=Set%20to%20come%20into%20force,prior%20to%20the%20implementation%20date>

⁸¹²⁶ Vers des outils de financement innovants pour l'agriculture française - Analyse n°208, Ministry of Agriculture and Sovereignty (Paris) 16 December 2024. Translation provided by Analyst. Access Date: 30 March 2025. <https://agriculture.gouv.fr/vers-des-outils-de-financement-innovants-pour-lagriculture-francaise-analyse-ndeg208>

⁸¹²⁷ Le Conseil d'État reconnaît le nouveau référentiel de la certification Haute Valeur Environnementale (HVE), Ministry of Agriculture and Food Sovereignty (Paris) 18 February 2025. Access Date: 28 September 2025. <https://agriculture.gouv.fr/hve-le-conseil-detat-reconnait-le-nouveau-referentiel-de-la-certification>

⁸¹²⁸ Government launches new national climate change adaptation plan, Ministry of Territorial Planning and Decentralization (Paris) 10 March 2025. Translation provided by Google Translate. Access Date: 29 March 2025. https://www.ecologie.gouv.fr/sites/default/files/documents/PNACC_EN_VF_2.pdf

On 17 March 2025, France reinforced its national strategy for securing supplies of critical metals, which are essential to the energy and digital transitions.⁸¹²⁹ This includes international partnerships focused on sustainable and ethical extraction practices, such as the Centenario lithium extraction project in Argentina and the Caremag rare earth separation plant. The strategy also promotes recycling and ESG standards, indirectly contributing to reduced environmental harm, improved resource efficiency and sustainable industrial inputs, including in sectors like fertilizer production that depend on such critical minerals.

On 17 April 2025, the Agence Française de Développement (AFD) Group and the OCP Group signed an agreement to finance a multistakeholder platform to strengthen African agricultural value chains.⁸¹³⁰ The initiative further supports the production of green fertilizers in Morocco.

On 2 July 2025, the Ministry of Agriculture and Food Sovereignty awarded EUR8.6 million in public funding to seven territorial projects under its ecological planning initiative.⁸¹³¹ Among the selected actions, the Terralaine project in Occitanie will transform wool into pellets that enhance water retention and fertilize crops, supporting the use of biofertilizers and contributing to more sustainable soil management.

France has partially complied its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. France committed to new tools for sustainable agriculture finance, international cooperation on water, updated national indicators on soil drought and pollution, climate adaptation plans, expanded mineral diplomacy to support sustainable inputs and promoting public education through initiatives. It has taken strong action in three of the components being strengthening local production of fertilizers, addressing environmental concerns about soil health and addressing concerns about water efficiency. However, France did not take steps to engage in international fertilizer trade, increase fertilizer efficiency or use biofertilizers.

Thus, France receives a score of 0.

Analyst: Iva Zivaljevic

Germany: +1

Germany has fully complied with its commitment to address the challenges of fertilizer shortages through strengthening local production, engaging in international trade, take efforts to increase fertilizer efficiency, encourage the domestic use of biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 11 December 2024, Germany supported launching the SolFOOD project in Kenya to strengthen climate-resilient maize production and reduce food loss from aflatoxin contamination.⁸¹³² The project focuses on the entire maize production chain—from soil health to microorganisms as fertilizers and post-harvest

⁸¹²⁹ France is taking action to secure its supplies of critical minerals and metals, essential for the energy and digital transitions, Government of France (Paris) 17 March 2025. Translation provided by Google Translate. Access Date: 31 March 2025.

<https://www.info.gouv.fr/actualite/la-france-agit-pour-securiser-ses-approvisionnements-en-minerais-et-metaux-critiques-indispensable-aux-transitions-energetique-et-numerique> <https://www.info.gouv.fr/actualite/la-france-agit-pour-securiser-ses-approvisionnements-en-minerais-et-metaux-critiques-indispensable-aux-transitions-energetique-et-numerique>

⁸¹³⁰ OCP Group and AFD Group formalize their strategic partnership in support of Morocco's low-carbon transition and the development of sustainable and inclusive agriculture to advance food security in Africa, Agence Française de Développement (Paris) n.d. Access Date: 3 September 2025. <https://www.afd.fr/en/actualites/communique-de-presse/ocp-group-and-afd-group-formalize-their-strategic-partnership-support-moroccos-low-carbon-transition-and-development-sustainable-and-inclusive-agriculture-advance-food>

⁸¹³¹ Planification écologique : 8,6 millions d'euros d'aides en faveur de la souveraineté et des transitions, Ministry of Agriculture and Food Sovereignty (Paris) 2 July 2025. Translation provided by Google Translate. Access Date: 9 July 2025.

<https://agriculture.gouv.fr/planification-ecologique-86-millions-deuros-daides-en-faveur-de-la-souverainete-et-des-0>

⁸¹³² Kenia - SolFOOD, Federal Ministry of Food and Agriculture (Berlin) 11 December 2024. Access Date: 30 March 2025. https://www.bmel.de/SharedDocs/Praxisbericht/EN/BKP_BTf/kenia_solfood.html

detoxygenation – aiming to support small farmers with ecological and technological solutions.⁸¹³³ The initiative promotes sustainable local food systems and improved soil management practices under changing climate conditions.

On 13 December 2024, Germany’s Commission on the Future of Agriculture issued a strategic report recommending reforms to fertilization policy to improve environmental performance and farm viability.⁸¹³⁴ Key recommendations include developing a farm-wide nutrient balance system for nitrogen and phosphorus, tailoring adjustments to fertilizer rules in nitrate-sensitive zones and promoting precision agriculture to reduce fertilizer use and environmental impacts. These measures aim to increase fertilizer efficiency, support soil health and reduce water pollution risks.

On 2 January 2025, the government of Germany reaffirmed its support for sustainable agriculture by funding projects through its Bilateral Trust Fund with the Food and Agriculture Organization (FAO) of the United Nations.⁸¹³⁵ Among the initiatives are efforts to promote sustainable soil management for nutrition-sensitive agriculture and ensure responsible governance of tenure in the water management sector. These actions aim to improve soil health and reduce the risk of water pollution from agricultural sources.

On 11 January 2025, the Federal Ministry of Food and Agriculture released the “Policy for our cooperation with African countries and regions” to facilitate joint efforts with African partners to promote sustainable agriculture.⁸¹³⁶ As a part of its Action Area 1, the policy outlines a plan to “base fertiliser supply on a sustainable, circular system,” improve soil health due to under-fertilization, use organic fertilisers to build resilient and regenerative systems.

On 18 January 2025, Germany hosted the 17th Berlin Agriculture Ministers’ Conference during the Global Forum for Food and Agriculture where participants committed to promoting sustainable agriculture systems.⁸¹³⁷ The ministers reaffirmed their commitment to using sustainable fertilizers and bolstering local fertilizer production, and underscored the importance of innovative technologies in enhancing fertilizers. Further, ministers also highlighted the need for coordinated efforts on biofertilizers.

On 29 January 2025, the Government of Germany committed USD900,000 to support emergency spring crop production in southern Ukraine through the FAO.⁸¹³⁸ The funding provides vouchers for fertilizers and other inputs to 250 smallholder farmers and 1,000 vulnerable households, aiming to restore agricultural livelihoods. This initiative strengthens local fertilizer use and efficiency in conflict-affected regions. It also supports food security by enabling continued crop production amidst disrupted supply chains.

On 3 April 2025, the Aspen Institute, supported by the German Federal Ministry for Economic Affairs and Climate Action concluded the 2025 U.S.-German Forum Future Agriculture in Magdeburg through its Transatlantic Program.⁸¹³⁹ The initiative brought together German and U.S. farmers and agricultural

⁸¹³³ CALL NIPS “Innovative Sustainable Production Systems,” Federal Ministry of Food and Agriculture (Bonn) n.d. Access Date: 11 July 2025. <https://aflasol.org/about-this-project/>

⁸¹³⁴ The future of agriculture. A common agenda in difficult times, Federal Ministry of Food and Agriculture (Berlin) 13 December 2024. Access Date: 30 March 2025. https://www.bmel.de/SharedDocs/Downloads/EN/_Farming/zkl-report-2-24.html

⁸¹³⁵ Food security projects - Bilateral Trust Fund with the FAO, Federal Ministry of Food and Agriculture (Berlin) 2 January 2025. Access Date: 29 March 2025. <https://www.bmel.de/EN/topics/international-affairs/international-projects/bilateral-trust-fund.html>

⁸¹³⁶ Policy for our cooperation with African countries and regions, Federal Ministry of Food and Agriculture (Berlin) 11 January 2025. Access Date: 11 July 2025. <https://www.bmel.de/SharedDocs/Download/EN/Publications/africa.pdf>

⁸¹³⁷ 17th Berlin Agriculture Ministers’ Conference 2025 Final Communiqué, Federal Ministry of Food and Agriculture (Berlin) 18 January 2025. Access Date: 11 July 2025. https://www.bmel.de/SharedDocs/Downloads/EN/_International-Affairs/gffa-2025-communicue-en.pdf

⁸¹³⁸ Ukraine - Emergency assistance for spring crop production in southern Ukraine, Federal Ministry of Food and Agriculture (Berlin) 29 January 2025. Access Date: 30 March 2025. https://www.bmel.de/SharedDocs/Praxisbericht/EN/BKP_BTf/btf_fao_ukraine_springcrop.html

⁸¹³⁹ US-German Forum Future Agriculture, Aspen Institute Germany (Berlin) 31 March 2025. Access Date: 12 May 2025. <https://www.aspeninstitute.de/events/u-s-german-forum-future-agriculture-in-person-meeting-in-magdeburg-germany>

stakeholders to discuss sustainable land use, including the interaction between agriculture and renewable energy. Participants explored practical and policy solutions to advance sustainable rural development, with implications for improving soil health and resource use in agricultural regions.

On 22 April 2025, Germany's draft coalition agreement reaffirmed its commitment to sustainable agriculture and land use as part of its broader climate and environmental agenda.⁸¹⁴⁰ The incoming government pledged to strengthen organic farming through a new strategy significantly, improve the framework for climate-resilient forests, and implement priority measures from the national water strategy. These efforts support improved soil health and water resource management through incentive-based approaches and environmental standards in the agricultural sector.

On 26 June 2025, the German CDU-SPD coalition announced the repeal of the agricultural raw materials balance law, which had required farmers to track fertilizer inputs and outputs to monitor nitrate pollution.⁸¹⁴¹ This rollback marked a deliberate shift away from regulatory oversight of fertilizer use, reducing pressure on farmers to limit nitrogen runoff. The decision signals a weakening of fertilizer efficiency measures and poses risks to soil and water protection commitments under EU law.

On 3 July 2025, the German government implemented strengthened regulations under its Fertiliser Application Ordinance to mandate rapid incorporation of urea into soil and ban surface-level spreading on grasslands and arable land.⁸¹⁴² These measures were designed to sharply reduce ammonia emissions, protect water resources, and ensure more efficient nutrient uptake through stricter control of nitrogen fertilizer application. This action demonstrates Germany's efforts to increase fertilizer efficiency and take strong steps to improve soil health and minimize water pollution, though it does not address domestic fertilizer production, international fertilizer trade, or biofertilizers.

Germany has fully complied with its commitment to address the challenges of fertilizer shortages through strengthening local production, engaging in international trade, take efforts to increase fertilizer efficiency, encourage the domestic use of biofertilizers while addressing the need to improve soil health and minimize water pollution. It has taken strong action in strengthening local production of fertilizers, increase fertilizer efficiency addressing environmental concerns about soil health and addressing concerns about water efficiency through amendments to the Fertilizer Act, funding schemes, stricter nitrate pollution controls and support for low-emission nutrient application.

Thus, Germany receives a score of +1.

Analyst: Iva Zivaljevic

India: 0

India has partially complied with its commitment to addressing the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

⁸¹⁴⁰ Coalition Agreement, Coalition Agreement (Berlin) 22 April 2025. Access Date: 15 May 2025.

<https://www.koalitionsvertrag2025.de/>

⁸¹⁴¹ German CDU-SPD coalition rolls back manure law; EU fine looms, EIDE News (Berlin) 26 June 2025. Access Date: 10 October 2025. <https://iede.news/en/european-union/german-cdu-spd-coalition-reverses-green-substance-balance-new-eu-fine-looms/>

⁸¹⁴² Study shows how successful new regulations on German agricultural ammonia emissions are helping to achieve EU targets, European Commission (Brussels) . https://environment.ec.europa.eu/news/study-shows-how-successful-new-regulations-german-agricultural-ammonia-emissions-are-helping-achieve-2025-07-03_en. https://environment.ec.europa.eu/news/study-shows-how-successful-new-regulations-german-agricultural-ammonia-emissions-are-helping-achieve-2025-07-03_en

On 19 March 2025, the Union Cabinet approved a proposal to develop a new Ammonia-Urea complex within the existing premises of Brahmaputra Valley Fertilizer Limited.⁸¹⁴³ This project will increase the domestic production of urea fertilizers and help address the growing demand nationwide.

On 28 March 2025, the Union Cabinet approved the Department of Fertilizer's Nutrient Based Subsidy rates for Phosphatic and Potassic (P&K) fertilizers.⁸¹⁴⁴ This funding applies for the Kharif 2025 season, from 1 April to 30 September 2025. The INR37,216 funding aims to promote the accessibility of P&K fertilizers for farmers despite potential global price fluctuations.

On 1 August 2025, the Government of India launched a campaign to ensure the quality and quantity of fertilizers across the country.⁸¹⁴⁵ The campaign aims to enforce the Fertilizers Control Order, which strictly prohibits the distribution of fertilizers that do not meet the standards prescribed by the government. The government has taken measures to investigate the conduct of manufacturers in the period of April 2025 to 25 July 2025.

On 11 September 2025, Chief Minister Mohan Charan Majhi announced a crackdown on the fertilizer black market, ordering stricter inspections and the redirection of seized stock.⁸¹⁴⁶ This initiative addresses challenges associated with fertilizer shortages, ensuring proper distribution through cooperative outlets.

On 30 October 2025, the Ministry of Ayush, IARI-R1, the National Bank of Agriculture and Rural Development (NABARD) in partnership with the Patanjali Organics Research Institute organized a two-day workshop on the "Cultivation of High-Quality Medicinal Plants through Soil Health Monitoring and Management."⁸¹⁴⁷ The event raised awareness on the importance of healthy soil, soil management techniques and soil fertility. Further, representatives reiterated their commitment to leveraging organic compost in agricultural practices.

India has partially complied with its commitment to addressing the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. India has taken moderate action in strengthening the local production of fertilizers, promoting fertilizer efficiency and biofertilizers as well as addressing environmental concerns on soil health. However, it has not taken action to address the other components of the commitment.

Thus, India receives a score of 0.

Analyst: Therese Angeline Reyes

⁸¹⁴³ Cabinet approves setting up of a new Brownfield Ammonia-Urea Complex Namrup IV Fertilizer Plant within the existing premises of Brahmaputra Valley Fertilizer Corporation Limited (BVFCL), Namrup, Assam, Press Information Bureau (New Delhi). 19 March 2025. Access Date: 29 June 2025. <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2112775>

⁸¹⁴⁴ Cabinet approves Nutrient Based Subsidy (NBS) rates for Kharif, 2025 (from 01.04.2025 to 30.09.2025) on Phosphatic and Potassic (P&K) fertilizers, Press Information Bureau (New Delhi) 28 March 2025. Access Date: 30 April 2025. <https://www.pib.gov.in/PressReleasePage.aspx?PRID=2116176>

⁸¹⁴⁵ CAMPAIGN FOR ENSURING QUALITY OF FERTILIZERS, Ministry of Agriculture & Farmers Welfare (Delhi) 1 August 2025. Access Date: 6 August 2025. <https://www.pib.gov.in/PressReleaseDetail.aspx?PRID=2151348>

⁸¹⁴⁶ Odisha government takes action against fertilizer black marketing to ensure supply to farmers, Times of India (New Delhi) 11 September 2025. Access Date: 15 November 2025. <https://1312apan1312sia13121312ia.indiatimes.com/city/bhubaneswar/odisha-government-takes-action-against-fertilizer-black-marketing-to-ensure-supply-to-farmers/articleshow/123831830.cms>

⁸¹⁴⁷ Patanjali Organics and IARI Collaborate to Promote Soil Health and Sustainable Agriculture through 'Swasth Dhara' Initiative, Times of India (New Delhi) 30 October 2025. Access Date: 16 November 2025. <https://timesofindia.in1312apan1312siacom/life-style/spotlight/patanjali-organics-and-iari-collaborate-to-promote-soil-health-and-sustainable-agriculture-through-swasth-dhara-initiative/articleshow/124937782.cms>

Indonesia: +1

Indonesia has fully complied with its commitment to addressing the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 25 December 2024, Indonesia allocated approximately USD2.9 billion worth, 9.55 million tonnes of subsidized fertilizers to be distributed domestically.⁸¹⁴⁸

On 1 January 2025, Indonesia distributed 9.55 million tons of subsidized fertilizers.⁸¹⁴⁹ This includes 4.6 million tons of urea fertilizer; 4.2 million tons of nitrogen, phosphorous, potassium-based fertilizer; 147,000 tons of cacao fertilizers and 500,000 tons of organic fertilizer. This initiative improves on Indonesia's agriculture sector, allowing for better absorption and future food security.

On 6 March 2025, Senior Minister Airlangga Hartarto and France's Ambassador of International Investments Pascal Cagni discussed collaborating on green technology, prior to the implementation of the European Union's carbon border adjustment mechanism.⁸¹⁵⁰ The green technology would include further developing low carbon industries for fertilizer.

On 11 March 2025, Coordinating Minister for Food Zulkifli Hasan formed a group "to supervise and evaluate the implementation of subsidized fertilizers."⁸¹⁵¹ The group would be responsible for creating and managing policies for subsidized fertilizers, to avoid irregular distribution in subsidized fertilizers in an effort to achieve food self-sufficiency.

On 15 April 2025, Indonesia and Jordan signed three memorandums of understanding (MoU) and a cooperation pact to establish a strategic partnership in the agricultural sector.⁸¹⁵² Under the partnership, the two countries commit to collaborating on fertilizer production, supporting agricultural trade and private sector investment.

On 17 April 2025, Minister of Agriculture Andi Amran Sulaiman, following a meeting with Jordanian Ambassador Sudqi Atallah Al Omoush, proposed the establishment of a joint fertilizer corporation that would supply both nations, as well as markets in Southern Asia and Asia.⁸¹⁵³ The partnership reduces fertilizer costs, utilize water management and irrigation systems modeled after Jordan's practices and implement drone technology as farming tools for the distribution of fertilizer, pesticides and herbicides.

On 21 April 2025, Minister of Public Works Dody Hanggodo instructed the implementation of water-saving rice irrigation technology at all regional centers.⁸¹⁵⁴ The technology would enable accurate and efficient water management, reducing water consumption to enhance crop quality and quantity.

⁸¹⁴⁸ Gov't Allocates Rp 46.8 Trillion Worth of Subsidized Fertilizers for 2025, Jakarta Globe (Jakarta) 25 December 2024. Access Date: 27 March 2025. <https://jakartaglobe.id/special-updates/govt-allocates-rp-468-trillion-worth-of-subsidized-fertilizers-for-2025>

⁸¹⁴⁹ Government Finally Distributes Subsidized Fertilizers on Time, Jakarta Globe (Jakarta) 3 January 2025. Access Date: 30 March 2025. <https://jakartaglobe.id/special-updates/government-finally-distributes-subsidized-fertilizers-on-time>

⁸¹⁵⁰ Indonesia Seeks French Technology to Brace for EU Carbon Border Tax, Jakarta Globe (Jakarta) 7 March 2025. Access Date: 30 March 2025. <https://jakartaglobe.id/business/indonesia-seeks-french-technology-to-brace-for-eu-carbon-border-tax>

⁸¹⁵¹ Minister forms working group to supervise subsidized fertilizers, Antara News (Jakarta) 11 March 2025, Access Date: 14 May 2025. <https://en.antaranews.com/news/347905/minister-forms-working-group-to-supervise-subsidized-fertilizers>

⁸¹⁵² Indonesia, Jordan sign agricultural cooperation deal, Antara News (Jakarta) 15 April 2025. Access Date: 16 November 2025. <http://1313apan1313siataranews.com/news/351909/indonesia-jordan-sign-agricultural-cooperation-deal>

⁸¹⁵³ Indonesia and Jordan explore fertilizer, agri-tech partnership, Antara News (Jakarta) 17 April 2025. Access Date: 14 May 2025. <https://en.antaranews.com/news/355077/indonesia-and-jordan-explore-fertilizer-agri-tech-partnership>

⁸¹⁵⁴ Indonesia expands use of water-saving rice irrigation technology, Antara News (Jakarta) 21 April 2025. Access Date: 14 May 2025. <https://en.antaranews.com/news/352325/indonesia-expands-use-of-water-saving-rice-irrigation-technology>

On 26 May 2025, Prime Minister Prabowo Subianto asked Laotian Prime Minister Sonexay Siphandone to explore opportunities of increasing potential trade and cooperation in agriculture, the fertilizer industry and mineral exploration.⁸¹⁵⁵

On 6 June 2025, Foreign Affairs Minister Sugiono announced that Indonesia hopes to strengthen cooperation with Belarus in developing a potash fertilizer that can further enhance food security.⁸¹⁵⁶ The minister also expressed a desire to expand exports and market access to Belarus. This partnership expands business contacts and market access between Indonesia and Belarus. The development and use of potash fertilizer provides nutrients to plants that support better harvest quality, flavour, and water retention.

On 11 June 2025, Agriculture Minister Sulaiman announced that President Prabowo Subianto has approved the allocation of approximately USD2.45 billion to support the national goal of sugar self-sufficiency within three years.⁸¹⁵⁷ The funds are allocated explicitly for fertilizer subsidies, procuring high-quality sugar cane, as well as other production inputs.

On 21 June 2025, Indonesia and the Eurasian Economic Union (EAEU) announced the conclusion of negotiations on the Indonesia-Eurasian Economic Union Free Trade Agreement (I-EAEU FTA).⁸¹⁵⁸ The I-EAEU FTA would increase commodities from the EAEU, including chemical fertilizer raw materials, wheat and other resources, as well as open new export avenues and foster better trade relations in Southeast Asia.

On 4 July 2025, the National Food Agency announced the government would be strengthening the Merah Putih Village/Urban Cooperatives with basic food outlets and operating business units that include fertilizer agents.⁸¹⁵⁹

On 14 October 2025, Director General of Economic and Fiscal Strategy at the Finance Ministry Febrio Kacaribu delivered a statement announcing several strategic measures including the streamlining of regulations and easing rules that hinder business development to attract more investors.⁸¹⁶⁰ This initiative advances efforts early in the year whereby the government removed 145 regulations on fertilizer distribution. Overall, these combined efforts boost the agricultural sector.

On 22 October 2025, Indonesia announced the construction of seven new fertilizer factories over a five-year period to boost national fertilizer self-sufficiency and reduce production costs through energy-efficiency technology.⁸¹⁶¹ The project is expected to increase subsidized fertilizer production by 700,000 tons. It reflects the government's commitment to strengthening local fertilizer production.

On 23 October 2025, Indonesia announced its decision to cut subsidized fertilizer prices by up to 20 per cent and streamline distribution channels, ensuring timely access for fertilizers to prevent price violations.⁸¹⁶² The

⁸¹⁵⁵ Prabowo invites Laos PM to step up bilateral trade, Antara News (Jakarta) 26 May 2025. Access Date: 8 July 2025.

<https://en.antaranews.com/news/356649/prabowo-invites-laos-pm-to-step-up-bilateral-trade>

⁸¹⁵⁶ Indonesia seeks stronger potash fertilizer ties with Belarus, Antara News (Jakarta) 6 June 2025. Access Date: 8 July 2025.

<https://en.antaranews.com/news/358141/indonesia-seeks-stronger-potash-fertilizer-ties-with-belarus>

⁸¹⁵⁷ Indonesia aims for sugar self-sufficiency in three years, Antara News (Surabaya) 11 June 2025. Access Date: 8 July 2025.

<https://en.antaranews.com/news/358909/indonesia-aims-for-sugar-self-sufficiency-in-three-years>

⁸¹⁵⁸ Indonesia, Eurasian Economic Union wrap up free trade talks, Antara News (Jakarta) 21 June 2025. Access Date: 8 July 2025.

<https://en.antaranews.com/news/360809/indonesia-eurasian-economic-union-wrap-up-free-trade-talks>

⁸¹⁵⁹ Bapanas plans simplified food supply chain via Kopdes, Antara News (Jakarta) 4 July 2025. Access Date: 8 July 2025.

<https://en.antaranews.com/news/363957/bapanas-plans-simplified-food-supply-chain-via-kopdes>

⁸¹⁶⁰ Indonesia moves to cut red tape, attract more investors, Antara News (Jakarta) 14 October 2025. Access Date: 16 November 2025. <http://1314apan1314siataranews.com/news/386073/indonesia-moves-to-cut-red-tape-attract-more-investors>

⁸¹⁶¹ Indonesia to build 7 new fertiliser factories worth Rp50 trillion, Antara News (Jakarta) 22 October 2025. Access Date: 16 November 2025. <http://1314apan1314siataranews.com/news/387365/indonesia-to-build-7-new-fertiliser-factories-worth-rp50-trillion>

⁸¹⁶² Indonesia cuts fertilizer 'rices 20 percent to boost farmers' welfare, Antara News (Jakarta) 23 October 2025. Access Date: 16 November 2025. <http://1314apan1314siataranews.com/news/387529/indonesia-cuts-fertilizer-prices-20-percent-to-boost-farmers-welfare>

policy also includes a planned increase of 700,000 tons of subsidized fertilizer by 2029, aligning with Indonesia's long-term fertilizer strategy.

On 25 October 2025, Indonesia increased its annual subsidized fertilizer quota from four million to 9.5 million tons and cuts prices by up to 20 per cent to support local farmers.⁸¹⁶³ Due to below target fertilizer distribution and gaps in resource allocation and absorption, these measures aim to strengthen local production.

On 5 November 2025, under President Subianto's direction, Indonesia cut subsidized fertilizer prices by up to 20 per cent, with urea capped at IDR90,000 and NPK at IDR92,000.⁸¹⁶⁴ These policies aim to enhance budget efficiency and support the construction of new fertilizer factories, addressing challenges in fertilizer shortages and strengthening local fertilizer production.

Indonesia has fully complied its commitment to addressing the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. Indonesia has taken strong action towards strengthening local production, increasing fertilizer efficiency and using biofertilizers, through increasing access and distribution of fertilizers. Indonesia has further taken action with increased engagement in international fertilizer trade through partnerships and implemented new technology addressing use of water in the agriculture sector.

Thus, Indonesia receives a score of +1.

Analyst: Jessica Wan

Italy: 0

Italy has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 16 December 2024, the Italian Committee for Biosafety, Biotechnology and Sciences of Life published the Implementation Action Plan (IAP) for the Italian Bioeconomy Strategy BIT II (2025-2027) on strategic measures to strengthen local fertilizer production, optimize fertilizer use, improve soil regeneration and minimize water pollution through promoting controlled fertilizer application and the use of slow-release fertilizers.⁸¹⁶⁵

On 30 January 2025, Regional Authorities of Calabria, Italy and the European Investment Bank signed two agreements that total to EUR100 million for sustainable agriculture and infrastructure.⁸¹⁶⁶ The first agreement focuses on supporting sustainable farming, converting land for organic farming and preventing hydrological instability. The second agreement focuses on supporting environmental sustainability through infrastructure.

On 10 March 2025, Ambassador to Kenya Roberto Natali, Director of the Office of the Foreign Trade Agency in Nairobi Giuseppe Manenti and the Director of the Horticultural Crops Directorate Christine Chesaro

⁸¹⁶³ Indonesia boosts subsidy for fertilizers, seeks tighter monitoring, Antara News (Jakarta) 26 October 2025. Access Date: 16 November 2025. <http://1315apan1315siataranews.com/news/388037/indonesia-boosts-subsidy-for-fertilizers-seeks-tighter-monitoring>

⁸¹⁶⁴ Minister reviews fertil'zer price cut policy in East Java's Bondowoso, Antara News (Jakarta) 5 November 2025. Access Date: 16 November 2025. <https://en.antaranews.com/news/390057/minister-reviews-fertilizer-price-cut-policy-in-east-javas-bondowoso>

⁸¹⁶⁵ UPDATED IMPLEMENTATION ACTION PLAN (2025-2027) FOR THE ITALIAN BIOECONOMY STRATEGY BIT II, Italian Committee for Biosafety, Biotechnology and Sciences of Life (Rome) 16 December 2024. Access Date: 3 September 2025. <https://cnbbsv.palazzochigi.it/media/gx3n4rwl/iap-16122024-en.pdf>

⁸¹⁶⁶ Italy: Regional authorities in Calabria receive €100 million for sustainable agriculture and infrastructure, European Investment Bank (Luxembourg) 30 January 2025. Access Date: 26 March 2025. <https://www.eib.org/en/press/all/2025-041-bei-100-milioni-alla-regione-calabria-per-agricoltura-e-infrastrutture-sostenibili>

launched the “Lab Innova for Africa Kenya” project, aimed to support African companies in the agribusiness sector.⁸¹⁶⁷ The initiative aims to strengthen Kenya’s production of fruits and vegetables by increasing the production of organic fertilizers and biofuels, while also fostering stronger bonds between Italy and Kenya.

On 16 April 2025, Ambassador to El Salvador Paola Emanuele Rozo Sordini, Vice President of the Republic of El Salvador Félix Ulloa and President-elect of Honduras Doris Gutiérrez inaugurated a soil and water analysis laboratory in El Salvador donated by Italy.⁸¹⁶⁸ The laboratory will provide soil and water health analysis services, enabling farmers to access data on soil fertility, which will facilitate more optimal fertilizer use and promote more sustainable agricultural practices.

On 29 May 2025, Italy financed EUR365 million to the Moroccan company Office Cherifien des Phosphates (OCP), the third largest fertilizer company in the world.⁸¹⁶⁹ The financing provides more opportunities for Italian companies in relevant sectors, strengthens ties between Italy and Morocco and creates more economic collaboration between the two states.

On 16 June 2025, the Italian National Agency for New Technologies, Energy and Sustainable Economic Development (ENEA) announced the ‘Bioses’-BIOgas SOSTenibile’ project, aimed to filter water, dilute fertilizers and irrigate fields.⁸¹⁷⁰ The project’s filtration process extracts nutrients and elements that can be used as agricultural fertilizers, helping Italy work towards its goal of a 20 percent reduction in synthetic fertilizers by 2030.

On 27 June 2025, Minister of Agriculture, Food Sovereignty and Forestry Francesco Lollobrigida and Minister of Agriculture and Irrigation of Somalia Mohamed Abdi Hayir met at the 6th African Union-European Union Ministerial Conference on Agriculture and confirmed the excellent relations between the two states and their desire to strengthen cooperation in the agri-food sector.⁸¹⁷¹ Areas for strategic collaboration in regard to irrigation and sustainable water management, promotion of agricultural research and climate adaptable agriculture were discussed, with Lollobrigida expressing interest in developing a Memorandum of Understanding with Somalia to further strengthen relations.

Italy has partially complied with commitment to undertake work on addressing fertilizer shortages through strengthening local production and local production. Italy has taken strong action to address environmental concerns about soil health and water efficiency and has taken weak action in engaging in international fertilizer trade and usage. However, it has not taken steps to strengthen local production of fertilizers.

Thus, Italy receives the score of 0.

Analyst: Jessica Wan

⁸¹⁶⁷ L'Italia avvia un corso di agribusiness per aziende del Kenya, (Rome) 10 March 2025. Translated by Google Translate. Access Date: 16 May 2025. https://www.ansa.it/canale_terraegusto/notizie/business/2025/03/10/litalia-avvia-un-corso-di-agribusiness-per-aziende-del-kenya_b0743e4a-4a14-4418-a112-8961df274637.html

⁸¹⁶⁸ L'Italia dona un laboratorio di analisi del suolo a El Salvador, ANSA (San Salvador) 16 April 2025. Translation provided by Google Translate. Access Date: 9 July 2025. https://www.ansa.it/sito/notizie/mondo/news_dalle_ambasciate/2025/04/16/litalia-dona-un-laboratorio-di-analisi-del-suolo-a-el-salvador_1fbef33a-713d-4eb2-a461-74d858588f6a.html

⁸¹⁶⁹ Da Italia 365 milioni di euro ad Azienda marocchina fosfato OCP, ANSA (Rome) 29 May 2025. Translation provided by Google Translate. Access Date: 9 July 2025. https://www.ansa.it/ansamed/it/notizie/rubriche/economia/2025/05/29/da-italia-365-milioni-di-euro-ad-azienda-marocchina-fosfato-ocp_4f548f7d-a5d0-49ba-8086-db86ecc0646a.html

⁸¹⁷⁰ Enea, concimi e acqua per i campi dagli scarti del biogas, ANSA (Rome) 16 June 2025. Translation provided by Google Translate. Access Date: 9 July 2025. https://www.ansa.it/canale_terraegusto/notizie/mondo_agricolo/2025/06/14/enea-concimi-e-acqua-per-i-campi-dagli-scatti-del-biogas_88e11039-7d17-4f85-9e48-1de466519a19.html

⁸¹⁷¹ Agricoltura. Bilaterale tra il Ministro Lollobrigida e il Ministro somalo Hayir: rafforzata la cooperazione nel settore agroalimentare, Ministero dell’agricoltura, della sovranità alimentare e delle foreste (Rome) 27 June 2025. Translation provided by Google Translate. Access Date: 9 October 2025. <https://www.masaf.gov.it/agricoltura-bilaterale-lollobrigida-hayir-cooperazione-settore-agroalimentare>

Japan: +1

Japan has fully complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 21 February 2025, the Japan International Cooperation Agency (JICA) and the World Food Programme (WFP) signed a grant agreement to provide aid up to JPY951 million for the Project for Strengthening the Wheat Value Chain.⁸¹⁷² This project targets the Republic of the Sudan, and seeks to distribute wheat seeds and fertilizers, provide equipment and foster effective wheat production management expertise. The goal is to contribute to food security and agricultural development in Sudan.

On 25 February 2025, JICA and the Food and Agriculture Organization of the United Nations (FAO) signed a grant agreement to provide aid up to JPY1.093 billion for the Project for Promoting Climate-resilient Agricultural Management through the Establishment of the Farmers Field School in the Conflict-affected Communities in Northern Regions.⁸¹⁷³ This project targets key regions in Ethiopia and initiatives to improve agricultural productivity by disseminating useful knowledge, practices and skills and rehabilitating irrigation infrastructure to improve soil health and address water efficiency.

On 28 February 2025, JICA and the Government of Egypt established a research partnership for the Project for Utilization of Agricultural Wastes for Plastic Alternative Productions to Establish a Circular Economy.⁸¹⁷⁴ This project intends to research and develop alternatives to plastic which may be produced using agricultural waste. The adoption of such plastic alternatives aims to reduce plastic/microplastic waste and, improve soil health and minimize water pollution.

On 6 March 2025, the Ministry of Agriculture, Forestry and Fisheries inducted new members into its National Promotion Council for Expanding the Use of Domestic Fertilizer Resources. Members include fertilizer raw material production companies, fertilizer manufacturing companies, farms and other consumers of fertilizer resources, research institutes and other related organizations and parties.⁸¹⁷⁵ This council facilitates both the promotion of domestic fertilizer utilization and the sharing of information and resources between council members.

On 9 April 2025, JICA and the Government of the Dominican Republic signed a loan agreement providing up to JPY10.93 billion for the Project to Improve Agricultural Financing for Strengthening the Food Value Chain.⁸¹⁷⁶ This project aims to improve access to finances in the agricultural sector of the Dominican Republic, primarily by providing loans to agricultural enterprises and cooperatives. In providing these loans, this project strengthens both local fertilizer production and trade in the Dominican Republic.

⁸¹⁷² Signing of Grant Agreement with WFP for Suda : Contributing to enhancement of agricultural productivity through improvement of the wheat value chain, Japan International Cooperation Agency (Tokyo) 25 February 2025. Access Date: 31 March 2025. https://www.jica.go.jp/english/information/press/2024/20250218_21.html

⁸¹⁷³ Signing of Grant Agreement with Ethiopia : Contributing to Reconstruction of Conflict-affected Areas through the Establishment of the Farmers Field School, Japan International Cooperation Agency (Tokyo) 26 February 2025. Access Date: 31 March 2025. https://www.jica.go.jp/english/information/press/2024/20250221_21.html

⁸¹⁷⁴ Signing of Record of Discussions on Science and Technology Research Partnership for Sustainable Development Project with Egypt: To promote circular economy, developing plastic alternatives through the utilization of agricultural waste, Japan International Cooperation Agency (Tokyo) 6 March 2025. Access Date: 31 March 2025. https://www.jica.go.jp/english/information/press/2024/20250305_11.html

⁸¹⁷⁵ 国内肥料資源の利用拡大に向けた全国推進協議会, 農林水産省 (Tokyo) 21 March 2025. Translation provided by Google Translate. Access Date: 31 March 2025. https://www.maff.go.jp/j/seisan/sien/sizai/s_hiryo/kokunaishigen/zennkokusuishin.html

⁸¹⁷⁶ Signing of Japanese ODA Loan Agreement with the Dominican Republic: Contributing to Development of Agricultural Sector and Strengthening Food Security, Japan International Cooperation Agency (Tokyo) 30 April 2025. Access Date: 8 June 2025. https://www.jica.go.jp/english/information/press/2025/20250409_11.html

On 28 May 2025, JICA signed an investment agreement with Agrolend, a Brazilian digital bank, for their Project for Improving Efficiency in Agricultural Finance.⁸¹⁷⁷ Agrolend finances more than 3,700 small and medium-sized farmers across Brazil by providing loans to help them purchase seeds, fertilizers, pesticides and other essential agricultural inputs. By investing in Agrolend, Japan contributes to Brazil's agricultural development and strengthen local fertilizer production and trade.

On 29 August 2025, the Japanese Ministry of the Environment announced the adoption of a project proposal submitted earlier in the year by the Oji Materia corporation under the "Decarbonized Circular Economy System Construction Promotion Project."⁸¹⁷⁸ The project aims to demonstrate the viability of a novel, marine-degradable resin made from wood and pulp fibers for use in the manufacturing of slow-release fertilizer. As existing resins are prone to become microplastics, this project aims to both reduce water pollution and encourage the production and use of fertilizer by lessening the environmental impact of fertilizer production.

Japan has fully complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. Japan has taken strong action in strengthening local production of fertilizers, increasing fertilizer efficiency, addressing environmental concerns about soil health and addressing concerns about water efficiency through its National Promotion Council, financial aid and research partnerships.

Thus, Japan receives a score of +1.

Analyst: Chebzaad Farid Singh

Korea: 0

Korea has partially complied with its commitment to address the challenges of fertilizer shortages through strengthening local production, engaging in international trade, taking efforts to increase fertilizer efficiency, encourage the domestic use of biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 14 February 2025, the Ministry of Agriculture, Food and Rural Affairs (MAFRA) released its 2025 Agricultural Work Plan, outlining its agricultural policy goals for the year 2025.⁸¹⁷⁹ Planned measures include the lowering of tariffs for fertilizer and livestock feed, the lowering of interest rates for agricultural loans, the expansion of multi-firm cooperative purchases of fertilizer products, and the expansion of direct subsidy payments for environmentally friendly practices.

On 12 March 2025, Korean agricultural input companies, supported by the MAFRA, opened booths in Asian agricultural trade exhibitions in Thailand, Vietnam and China to court potential buyers.⁸¹⁸⁰ The objective is to promote Korean eco-friendly fertilizers among Asian markets to encourage exports, with a focus on the three aforementioned countries.

⁸¹⁷⁷ Signing of Investment Agreement on Project for Improving Efficiency in Agricultural Finance in Brazil (Private Sector Investment Finance), Japan International Cooperation Agency (Tokyo) 29 May 2025. Access Date: 8 June 2025. https://www.jica.go.jp/english/information/press/2025/20250521_11.html

⁸¹⁷⁸ 令和7年度脱炭素型循環経済システム構築促進事業(委託)の公募結果について, 環境省 (Tokyo) 29 August 2025. Translation provided by Google Translate. Access Date: 14 October 2025. https://www.env.go.jp/press/press_00470.html

⁸¹⁷⁹ The 2025 Work Plan for the Ministry of Agriculture, Food and Rural Affairs, Ministry of Agriculture, Food, and Rural Affairs (Sejong) 14 February 2025. Access Date: 29 March 2025. <https://www.mafra.go.kr/bbs/english/25/573301/artclView.do>

⁸¹⁸⁰ Korean Agricultural Inputs and Machinery Find Opportunities to Enter Vietnam, Thailand, and China through International Trade Fairs, Ministry of Agriculture, Food, and Rural Affairs (Sejong) 11 March 2025. Access Date: 29 March 2025. <https://www.mafra.go.kr/bbs/english/25/573520/artclView.do>

On 23 June 2025, the MAFRA sent a delegation of 15 Korean exporters to Thailand to showcase Korean-made agricultural inputs, including Korean fertilizer products, to buyers from Thailand, Vietnam and other Southeast Asian countries.⁸¹⁸¹

On 22 July 2025, the MAFRA held a buyers-exporters meeting for agricultural inputs, with attendance of buyers from 27 countries and 113 Korean exporters.⁸¹⁸² The meeting will include 588 one-on-one business meetings between both sides, with a total of 75 buyers present. The meeting also includes follow-up meetings to ensure contracts are signed. The MAFRA aim to encourage contracts between Korean exporters and overseas markets to expand agricultural input exports.

On 21 September 2025, the MAFRA sent a trade delegation of 12 Korean agricultural exporter to the United Arab Emirates.⁸¹⁸³ The delegation showcased Korean-made agricultural input products to prospective buyers, including fertilizer products. The MAFRA also provided support by meeting with local government officials, setting up meetings, and investigated local market trends. The export delegation seeks to provide opportunities for Korean agricultural exporters to enter overseas markets and increase exports.

Korea has partially complied with its commitment to combat fertilizer shortages though efforts to strengthen local production, engage in trade, increase fertilizer efficiency and encourage biofertilizer usage while protecting soil health and minimize water pollution. Korea has made strides to encourage exports of its eco-friendly variations of agricultural fertilizers among African and Asian markets and plans to implement measures to increase the affordability of fertilizer products among farmers. It also plans to introduce financial incentives for the usage of more eco-friendly fertilizers. However, Korea has not focused on addressing concerns about soil health or water efficiency.

Thus, Korea receives a score of 0.

Analyst: Jackie Wang

Mexico: 0

Mexico has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 15 January 2025, the Ministry of Agriculture and Rural Development announced the 2025 “Fertilizers for Wellbeing Program” a government program that supported local production.⁸¹⁸⁴ The program aims to deliver fertilizers to producers of priority crops for food production.

On 20 March 2025, President Claudia Sheinbaum announced a USD3.7 billion investment from the corporation Fermaca Dreams, with USD1 billion of the investment to be allocated for the construction of a fertilizer

⁸¹⁸¹ S. Korea Expands an Entry of Its Agricultural Inputs into the Market of Thailand through an Export Delegation, Ministry of Agriculture, Food and Rural Affairs (Sejong) 24 June 2025. Access Date: 15 July 2025. <https://www.mafra.go.kr/bbs/english/25/574475/artclView.do>

⁸¹⁸² Buyers from 27 Countries, including Vietnam, Kazakhstan, and India, Gather at the ROK’s Buyers-Exporters Meeting for Agricultural Inputs, Ministry of Agriculture, Food and Rural Affairs (Sejong) 23 July 2025. Access Date: 29 September 2025. <https://www.mafra.go.kr/bbs/english/25/574705/artclView.do>

⁸¹⁸³ The ROK Expands an Entry of Its Agricultural Inputs into the Middle East, Including the UAE, Ministry of Agriculture, Food and Rural Affairs (Sejong) 21 September 2025. Access Date: 29 September 2025. <https://www.mafra.go.kr/bbs/english/25/575144/artclView.do>

⁸¹⁸⁴ Programa de Fertilizantes para el Bienestar 2025, Gobierno De México (Mexico City) 15 January 2025. Translated by Google Translate. Access Date: 17 May 2025. <https://www.gob.mx/agricultura/acciones-y-programas/programa-fertilizantes-para-el-bienestar-2025>

production plant in Durango, Mexico.⁸¹⁸⁵ The fertilizer plant produces 600,000 tons of urea annually and decreases the need for Mexico to import the product. This investment is part of President Sheinbaum's "Plan Mexico."

On 3 April 2025, President Sheinbaum announced 18 programs and actions related to her initiative "Plan Mexico," amongst the 18 programs and actions included plans to increase food sovereignty and production of fertilizers.⁸¹⁸⁶ Plan Mexico increases production of fertilizers through public-private and private-public projects that would be signed and put in place in the first half of 2025.

On 29 April 2025, the Ministry of Agriculture and Rural Development provided free delivery for 5,400 tons of DAP fertilizers and 10,600 tons of urea fertilizers in Campeche as part of the Fertilizers for Wellbeing program.⁸¹⁸⁷ This distribution aims to cover over 53,000 hectares of priority crops such as corn, sugarcane, rice, beans and other crops.

On 30 April 2025, the Ministry of Agriculture and Rural Development announced the delivery of 9,300 tons of DAP fertilizers and 13,800 tons of urea to Guanajuato as part of the Fertilizers for Wellbeing program.⁸¹⁸⁸ The distributed DAP and urea aim to cover 78,000 hectares of arable land dedicated to crops such as corn, beans and wheat.

On 1 May 2025, the Ministry of Agriculture and Rural Development distributed over 103,400 tons of DAP fertilizer and urea fertilizer packages as part of the Fertilizers for Wellbeing program.⁸¹⁸⁹ The free fertilizers aim to promote agricultural productivity in over 344,700 hectares of arable land in the region dedicated to priority crops such as corn, coffee, rice and others.

On 8 May 2025, the Ministry of Agriculture and Rural Development distributed more than 13,000 tons of DAP fertilizers and more than 20,000 tons of urea fertilizers in Hidalgo as part of the Fertilizers of Wellbeing program.⁸¹⁹⁰ The plant nutrition inputs given aim to strengthen the production of crops such as corn, rice, sugarcane, beans and other crops in over 110,000 hectares of arable land in Hidalgo.

On 12 May 2025, the Ministry of Agriculture and Rural Development distributed roughly 6,000 tons of DAP and roughly 22,000 tons of urea fertilizers to the Jasilcan countryside as part of the Fertilizers for Wellbeing

⁸¹⁸⁵ Presidenta anuncia inversión de 3 mil 700 mdd de Fermaca Dreams para construcción de centro de datos y planta de fertilizantes en Durango, Gobierno De México (Mexico City) 20 March 2025. Translated by Google Translate. Access Date: 19 May 2025. <https://www.gob.mx/presidencia/prensa/presidenta-anuncia-inversion-de-3-mil-700-mdd-de-fermaca-dreams-para-construccion-de-centro-de-datos-y-planta-de-fertilizantes-en-durango>

⁸¹⁸⁶ Sheinbaum unveils an even more ambitious version of her transformative Plan México, Mexico News Daily (Mexico City) 3 April 2025. Translation provided by Google Translate. Access Date: 17 May 2025. <https://mexiconewsdaily.com/news/sheinbaum-plan-mexico-projects>

⁸¹⁸⁷ AGRICULTURA arranca entrega de Fertilizantes para el Bienestar 2025 en Campeche para impulsar la autosuficiencia y soberanía alimentaria, Gobierno de México (Mexico City) 29 April 2025. Translation provided by Google Translate. Access Date: 22 June 2025. <https://www.gob.mx/agricultura/prensa/agricultura-arranca-entrega-de-fertilizantes-para-el-bienestar-2025-en-campeche-para-impulsar-la-autosuficiencia-y-soberania-alimentaria?idiom=es>

⁸¹⁸⁸ AGRICULTURA distribuye Fertilizantes para el Bienestar 2025 para 41 mil productoras y productores de Guanajuato, Gobierno de México (Mexico City) 30 April 2025. Translation provided by Google Translate. Access Date: 24 June 2025. <https://www.gob.mx/agricultura/prensa/agricultura-distribuye-fertilizantes-para-el-bienestar-2025-para-41-mil-productoras-y-productores-de-guanajuato?idiom=es>

⁸¹⁸⁹ Impulso al campo chiapaneco: AGRICULTURA inicia distribución de Fertilizantes para el Bienestar 2025, Gobierno de México (Mexico City) 1 May 2025. Translation provided by Google Translate. Access Date: 24 June 2025. <https://www.gob.mx/agricultura/prensa/impulso-al-campo-chiapaneco-agricultura-inicia-distribucion-de-fertilizantes-para-el-bienestar-2025?idiom=es>

⁸¹⁹⁰ AGRICULTURA impulsa la productividad del campo hidalguense con Fertilizantes para el Bienestar 2025, Gobierno de México (Mexico City) 8 May 2025. Translation provided by Google Translate. Access Date: 21 June 2025. <https://www.gob.mx/agricultura/prensa/agricultura-impulsa-la-productividad-del-campo-hidalguense-con-fertilizantes-para-el-bienestar-2025?idiom=es>

program.⁸¹⁹¹ The fertilizers delivered to the countryside aim to aid in food production for roughly 50,000 producers. The provided fertilizers will be able to cover over 94,000 hectares of arable land.

On 13 May 2025, the Ministry of Agriculture and Rural Development announced the launch of the Fertilizers for Wellbeing program in Nayarit.⁸¹⁹² As part of the program, the Ministry will be providing over 4,000 tons of DAP and approximately 8,000 tons of urea to producers, accounting for roughly 52,000 hectares of arable land.

On 14 May 2025, the Ministry of Agriculture and Rural Development provided free delivery for 2,100 tons of DAP and urea fertilizers in Colima as part of the Fertilizers for Wellbeing program.⁸¹⁹³ The fertilizers distributed in the region will help in food production for roughly 4,000 producers, accounting for more than 7,100 hectares of arable land.

On 16 May 2025, the Ministry of Agriculture and Rural Development delivered over 4,200 tons of DAP and 4,200 tons of urea fertilizers to Querétaro as part of their Fertilizers for Wellbeing program.⁸¹⁹⁴ The distribution of these plant nutrition inputs aims to cover over 28,000 hectares of arable land dedicated to the production of crops such as corn, beans and sugarcane.

On 17 May 2025, the Ministry of Agriculture and Rural Development distributed 700 tons of DAP and 3,100 tons of urea to Aguascalientes as part of the Fertilizers for Wellbeing program.⁸¹⁹⁵ The plant nutrition inputs were delivered free of charge to boost agricultural productivity for more than 12,700 hectares of arable land.

On 19 May 2025, the Ministry of Agriculture and Rural Development began delivering over 14,300 tons of DAP and 14,300 tons of UREA fertilizers to Zacatecas as part of the Fertilizers for Wellbeing program.⁸¹⁹⁶ The distribution of the fertilizers is dedicated to strengthening the agricultural productivity of over 118,000 hectares of arable land for crops such as corn, beans and wheat.

On 20 May 2025, the Ministry of Agriculture and Rural Development distributed approximately 1,700 tons of DAP and approximately 3,000 tons of UREA fertilizers in Coahuila as part of the Fertilizers for Wellbeing program.⁸¹⁹⁷ The distribution of these fertilizers aims to promote soil productivity for over 16,200 hectares of land in the region.

⁸¹⁹¹ Fertilizantes para el Bienestar 2025 arranca en Jalisco para más de 50 mil productoras y productores, Gobierno De México (Mexico City) 12 May 2025. Translation provided by Google Translate. Access Date: 23 June 2025. <https://www.gob.mx/agricultura/prensa/fertilizantes-para-el-bienestar-2025-arranca-en-jalisco-para-mas-de-50-mil-productoras-y-productores?idiom=es>

⁸¹⁹² AGRICULTURA arranca en Nayarit el programa de Fertilizantes para el Bienestar 2025, Gobierno de México (Mexico City) 13 May 2025. Translation provided by Google Translate. Access Date: 24 June 2025. <https://www.gob.mx/agricultura/prensa/agricultura-arranca-en-nayarit-el-programa-de-fertilizantes-para-el-bienestar-2025?idiom=es>

⁸¹⁹³ Productoras y productores colimenses reciben Fertilizantes para el Bienestar 2025 para la autosuficiencia y soberanía alimentaria, Gobierno De México (Mexico City) 14 May 2025. Translation provided by Google Translate. Access Date: 23 June 2025. <https://www.gob.mx/pronabive/prensa/productoras-y-productores-colimenses-reciben-fertilizantes-para-el-bienestar-2025-para-la-autosuficiencia-y-soberania-alimentaria-397738?idiom=es>

⁸¹⁹⁴ AGRICULTURA inicia entrega de Fertilizantes para el Bienestar 2025 en Querétaro, Gobierno de México (Mexico City) 16 May 2025. Translation provided by Google Translate. Access Date: 22 June 2025. <https://www.gob.mx/agricultura/prensa/agricultura-inicia-entrega-de-fertilizantes-para-el-bienestar-2025-en-queretaro?idiom=es>

⁸¹⁹⁵ AGRICULTURA impulsa al campo hidrocálido con más de 3 mil 800 toneladas de Fertilizantes para el Bienestar 2025, Gobierno de México (Mexico City) 17 May 2025. Translation provided by Google Translate. Access Date: 22 June 2025. <https://www.gob.mx/agricultura/prensa/agricultura-impulsa-al-campo-hidrocalido-con-mas-de-3-mil-800-toneladas-de-fertilizantes-para-el-bienestar-2025>

⁸¹⁹⁶ Arranca en Zacatecas entrega de Fertilizantes para el Bienestar 2025 para más de 59 mil productoras y productores, Gobierno de México (Zacatecas) 19 May 2025. Translation provided by Google Translate. Access Date: 22 June 2025. <https://www.gob.mx/agricultura/prensa/arranca-en-zacatecas-entrega-de-fertilizantes-para-el-bienestar-2025-para-mas-de-59-mil-productoras-y-productores?idiom=es>

⁸¹⁹⁷ AGRICULTURA fortalece el campo coahuilense con Fertilizantes para el Bienestar 2025 en beneficio de 8 mil productoras y productores, Gobierno de México (Mexico City) 20 May 2025. Translation provided by Google Translate. Access Date: 22 June 2025. <https://www.gob.mx/agricultura/prensa/agricultura-fortalece-el-campo-coahuilense-con-fertilizantes-para-el-bienestar-2025-en-beneficio-de-8-mil-productoras-y-productores?idiom=es>

On 21 May 2025, the Ministry of Agriculture and Rural Development provided around 12,300 tons of DAP and 13,700 tons of UREA fertilizers to San Luis Potosí as part of the Fertilizers for Wellbeing program.⁸¹⁹⁸ The free delivery of these plant nutrition inputs aims to boost soil productivity for over 89,000 hectares of arable land.

On 22 May 2025, the Ministry of Agriculture and Rural Development started distributing approximately 51,000 tons of DAP and over 54,000 tons of UREA to producers in Sinaloa as part of the Fertilizers for Wellbeing program.⁸¹⁹⁹ The free fertilizers aim to promote the soil productivity of over 342,500 hectares of arable land for corn, beans, wheat and sugar cane.

On 23 May 2025, the Ministry of Agriculture and Rural Development delivered approximately 1,300 tons of DAP and over 1,700 tons of UREA to Sonora as part of the Fertilizers for Wellbeing program.⁸²⁰⁰ The free distribution of these resources aims to boost the agricultural productivity of 10,000 hectares of strategic crops like corn, beans, rice and oats.

On 26 May 2025, the Ministry of Agriculture and Rural Development distributed more than 10,500 tons of DAP and more than 15,500 tons of UREA fertilizers in Chihuahua as part of the Fertilizers for Wellbeing program.⁸²⁰¹ The fertilizers are meant to strengthen soil productivity for over 90,000 hectares of crops.

On 28 May 2025, the Ministry of Agriculture and Rural Development began delivering over 2,700 tons of DAP and roughly 2,800 tons of UREA to boost agricultural productivity in over 18,300 hectares in Nuevo León as part of the Fertilizers for Wellbeing program.⁸²⁰²

On 4 June 2025, the Ministry of Agriculture and Rural Development announced the distribution of over 14,200 tonnes worth of DAP and UREA packages in Tamaulipas as part of the Fertilizers for Wellbeing program.⁸²⁰³ The plant nutrition packages aim to aid in the productivity of over 47,600 hectares of arable land dedicated to harvesting corn, soybeans, wheat, rice and sugarcane among other agricultural products.

⁸¹⁹⁸ Productoras y productores potosinos reciben Fertilizantes para el Bienestar 2025 para impulsar la autosuficiencia y soberanía alimentaria, Gobierno de México (Mexico City) 21 May 2025. Translation provided by Google Translate. Access Date: 22 June 2025. <https://www.gob.mx/agricultura/prensa/productoras-y-productores-potosinos-reciben-fertilizantes-para-el-bienestar-2025-para-impulsar-la-autosuficiencia-y-soberania-alimentaria?idiom=es>

⁸¹⁹⁹ Inicia AGRICULTURA entrega gratuita de fertilizantes para más de 53 mil personas productoras en Sinaloa, Gobierno de México (Guasave) 22 May 2025. Translation provided by Google Translate. Access Date: 24 June 2025. <https://www.gob.mx/agricultura/prensa/inicia-agricultura-entrega-gratuita-de-fertilizantes-para-mas-de-53-mil-personas-productoras-en-sinaloa?idiom=es>

⁸²⁰⁰ Impulsa AGRICULTURA producción agrícola con programa Fertilizantes para el Bienestar en Sonora, Gobierno de México (Álamos) 23 May 2025. Translation provided by Google Translate. Access Date: 23 June 2025. <https://www.gob.mx/agricultura/prensa/impulsa-agricultura-produccion-agricola-con-programa-fertilizantes-para-el-bienestar-en-sonora?idiom=es>

⁸²⁰¹ Beneficiará AGRICULTURA a más de 47 mil productoras y productores con fertilizantes gratuitos en Chihuahua, Gobierno de México (Chihuahua) 26 May 2025. Translated by Google Translate. Access Date: 23 June 2025. <https://www.gob.mx/agricultura/prensa/beneficiara-agricultura-a-mas-de-47-mil-productoras-y-productores-con-fertilizantes-gratuitos-en-chihuahua?idiom=es>

⁸²⁰² Inicia AGRICULTURA entrega gratuita y directa de fertilizantes en Nuevo León, Gobierno de México (Linares) 28 May 2025. Translation provided by Google Translate. Access Date: 23 June 2025. <https://www.gob.mx/agricultura/prensa/inicia-agricultura-entrega-gratuita-y-directa-de-fertilizantes-en-nuevo-leon?idiom=es>

⁸²⁰³ Impacta AGRICULTURA a más de 47 mil hectáreas de cultivos con Fertilizantes para el Bienestar 2025 en Tamaulipas, Gobierno de México (Tula) 4 June 2025. Translation provided by Google Translate. Access Date: 23 June 2025. <https://www.gob.mx/agricultura/prensa/impacta-agricultura-a-mas-de-47-mil-hectareas-de-cultivos-con-fertilizantes-para-el-bienestar-2025-en-tamaulipas?idiom=es>

On 24 June 2025, the Ministry of Agriculture and Rural Development distributed over 45 tons of DAP and 130 tons of UREA packages to Baja California Sur as part of the Fertilizers for Wellbeing program.⁸²⁰⁴ These packages aim to aid in the soil productivity of over 600 hectares of land dedicated to the production of corn, beans, sugar cane, oats and other crops.

On 8 July 2025, Secretary of Science Rosaura Ruiz Gutiérrez visited the International Wheat and Maize Improvement Centre (CIMMYT) where the government and CIMMYT reaffirmed their joint commitment to transforming agri-food systems.⁸²⁰⁵ They recognized the importance of practicing soil conservation and health, rational water use and biological fertilization.

On 2 August 2025, Head of the Ministry of Agriculture and Rural Development Julio Berdegué Sacristán discussed the 2024-2030 National Water Plan and the National Irrigation Technology Program for efficient water use at the National Forum for Efficient Water and Energy Management.⁸²⁰⁶ In the meeting, Sacristán emphasised the need for Mexico to produce more food by more efficient ways for water to be used in agriculture.

On 7 August 2025, the Ministry of Agriculture and Rural Development opened their call for new applications for the 2025 Fertilizers for Well-being program to domestic agriculture producers in different regions.⁸²⁰⁷ The program aims to strengthen timely and free access to plant nutrition inputs, consolidating access to fertilizers as a constitutional right for agriculture producers, the government reaffirmed their commitment to Mexican producers that contribute to the food sovereignty of Mexico.

On 4 September 2025, the Minister of Agriculture and Rural Development launched the 2025 Fertilizers for Well-being program in Baja California, delivering over 280 tons of fertilizer to producers in the state.⁸²⁰⁸ The program will benefit 476 producers in Baja California, with priority for corn, bean, milpa and oats, the ministry also called for the participation in the Social Audit Program to ensure that those who are directly working on the land are receiving the fertilizers.

On 25 September 2025, the Ministry of Agriculture and Rural Development and the German Technical Cooperation Agency (GIZ), reaffirmed their commitment to transforming agri-food systems to make them more sustainable, just, and resilient to climate change.⁸²⁰⁹ This comes after presenting the results of the Vida y

⁸²⁰⁴ Impulsa AGRICULTURA 600 hectáreas de cultivos prioritarios de BCS con fertilizantes gratuitos, Gobierno de México (La Paz) 24 June 2025. Translation provided by Google Translate. Access Date: 24 June 2025. <https://www.gob.mx/agricultura/prensa/impulsa-agricultura-600-hectareas-de-cultivos-prioritarios-de-bcs-con-fertilizantes-gratuitos>

⁸²⁰⁵ Gobierno de México y CIMMYT reafirman compromiso conjunto para transformar los sistemas agroalimentarios, Gobierno de México (Mexico City) 8 July 2025. Translation provided by Google Translate. Access Date: 9 July 2025. <https://www.gob.mx/agricultura/prensa/gobierno-de-mexico-y-cimmyt-reafirman-compromiso-conjunto-para-transformar-los-sistemas-agroalimentarios?idiom=es>

⁸²⁰⁶ Hay que producir más comida con menos agua: secretario de AGRICULTURA, Julio Berdegué, Gobierno de México (Mexico City) 2 August 2025. Translation provided by Google Translate. Access Date: 9 October 2025. <https://www.gob.mx/agricultura/prensa/hay-que-producir-mas-comida-con-menos-agua-secretario-de-agricultura-julio-berdegue?idiom=es>

⁸²⁰⁷ Convoca AGRICULTURA a productoras y productores a registrarse al programa Fertilizantes para el Bienestar, Gobierno de México (Mexico City) 7 August 2025. Translation provided by Google Translate. Access Date: 10 October 2025. <https://www.gob.mx/agricultura/prensa/convoca-agricultura-a-productoras-y-productores-a-registrarse-al-programa-fertilizantes-para-el-bienestar?idiom=es>

⁸²⁰⁸ AGRICULTURA entrega más de 280 toneladas de Fertilizantes en Baja California para fortalecer la autosuficiencia y soberanía alimentaria, Gobierno de México (Mexico City) 4 September 2025. Translation provided by Google Translate. Access Date: 10 October 2025. <https://www.gob.mx/agricultura/prensa/agricultura-entrega-mas-de-280-toneladas-de-fertilizantes-para-el-bienestar-en-baja-california-para-fortalecer-la-autosuficiencia-y-soberania-alimentaria?idiom=es>

⁸²⁰⁹ México y Alemania promueven sistemas agroalimentarios más sostenibles, justos y resilientes, Gobierno de México (Mexico City) 25 September 2025. Translation provided by Google Translate. Access Date: 10 October 2025. <https://www.gob.mx/agricultura/prensa/mexico-y-alemania-promueven-sistemas-agroalimentarios-mas-sostenibles-justos-y-resilientes?idiom=es>

Campo Project, a bilateral agri-food initiative from May 2022 to October 2025. The Project carried out actions that restored and protected soils, as well as increased utilisation of sustainable natural resources to promote better cultivation of land and agriculture.

Mexico has partially complied with commitment to undertake work on addressing fertilizer shortages through strengthening local production and local production. Mexico has taken strong action to strengthen local production of fertilizers through the Fertilizers for Wellbeing program. It has also taken weak action in addressing environmental concerns about soil health and water efficiency. However, Mexico has not taken steps to engage in international fertilizer trade or increase fertilizer efficiency.

Thus, Mexico receives the score of 0.

Analyst: Jessica Wan

Russia: -1

Russia has not complied with its commitment to address the challenges of fertilizer shortages by strengthening local production and trade, increasing fertilizer efficiency, and utilizing biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 1 December 2024, Russian set export quotas for mineral fertilizers to be in effect until 31 May 2025.⁸²¹⁰ The export quota for nitrogen fertilizers is set at approximately 11.2 million tonnes, and for compound fertilizers, 8 million tonnes. The Ministry of Industry and Trade has been tasked with distributing these quotas among foreign trade participants.⁸²¹¹ In accordance with President Vladimir Putin's instructions, this decision aims to ensure that an adequate volume of fertilizers remains available for the domestic market and deprioritizes international fertilizer trade.

On 23 April 2025, an international press conference hosted by the Media Group "Rossiya Segodnya" in Moscow presented a study by the consulting firm Implementa titled "Russian Mineral Fertilizers: In Search of an Optimal Path to Market."⁸²¹² This research focused on Russia's mineral fertilizer sector, including the country's position as a global leader in fertilizer exports. It discussed opportunities for expanding exports, driven by rising global demand and shortages, especially in Latin America and South Asia, highlighting the role of low production costs in Russia's competitive edge. The study predicts an increase in Russia's fertilizer production by 2030, with a projected rise of more than 15 million tonnes, particularly in urea and potassium chloride.

On 8 May 2025, the Government of the Russian Federation issued Decree No. 601 introducing a temporary quantitative restriction through non-tariff export quotas on the export of certain types of mineral fertilizers, total approximately 19.96 million tonnes.⁸²¹³ The measure aims to stabilize domestic fertilizer availability, prices and food security by prioritizing supply for Russian agricultural producers.

On 23 May 2025, the Federal Antimonopoly Service (FAS) approved the trade policies of mineral fertilizer producers, confirming that domestic fertilizer prices will not exceed September 2022 levels; producers were

⁸²¹⁰ Fertilizer market anticipates little impact from updated Russian export quotas, S&P Global (New York), 25 October 2024. Access Date: 20 May 2025. <https://www.spglobal.com/commodity-insights/en/news-research/latest-news/fertilizers/102524-fertilizer-market-anticipates-little-impact-from-updated-russian-export-quotas>

⁸²¹¹ Government sets export quotas for mineral fertilizers for December 2024 – May 2025, The Russian Government (Moscow) 23 October 2024. Access Date: 20 May 2025. <http://government.ru/en/docs/53081/>

⁸²¹² Russian mineral fertilizers: in search of an optimal way to market, Implementa (Moscow) 23 April 2025. Access Date: 20 May 2025. <https://implementa.ru/en/researches-1>

⁸²¹³ Постановление Правительства РФ от 08.05.2025 № 601 "О введении временного количественного ограничения "а вывоз отдельных видов удобрений", Алта-Софт (Moscow) 8 May 2025. Translation provided by Google Translate. Access Date: 9 October 2025. <https://www.alt.ru/tamdoc/25ps0601/>

required to submit documents by 16 May under the export-quota decree, and FAS monitoring reported no exceedances.⁸²¹⁴

On 22 August 2025, Deputy Prime Minister Dmitry Patrushev announced that state support for Russia's agricultural sector in 2025 will exceed RUB0.5 trillion, maintaining all major subsidy programs and adding RUB2 billion for new loan subsidies.⁸²¹⁵ He noted that a new federal project, Development of Small Agrobusiness, will launch in 2026 to consolidate support for farmers and small enterprises, aiming to achieve the goal of increasing agricultural production by 25 per cent by 2030.

Russia has not complied with its commitment to addressing the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. Although Russia made efforts to financially invest in agricultural development, the country has not conducted sufficient action to merit partial compliance.

Thus, Russia receives a score of -1 .⁸²¹⁶

Analyst: Ashiya Dewan

Saudi Arabia: -1

Saudi Arabia has not complied with its commitment to combat fertilizer shortages though efforts to strengthen local production, engage in trade, increase fertilizer efficiency and encourage biofertilizer usage while protecting soil health and minimize water pollution.

On 6 December 2024, Saudi Arabia announced that they would be increasing recycled water for agriculture from 500,000 to two million cubic meters, targeting 90 per cent of treated water.⁸²¹⁷ Increasing the use of recycled water is able to minimize water pollution and improve water efficiency in agriculture-related initiatives.

Saudi Arabia has not complied with its commitment to combat fertilizer shortages though efforts to strengthen local production, engage in trade, increase fertilizer efficiency and encourage biofertilizer usage while protecting soil health and minimize water pollution. Although Saudi Arabia has taken action towards reducing water pollution, further action in the area of strengthening local production of fertilizers, engaging in international fertilizer trade, increasing fertilizer efficiency, using biofertilizers and addressing environmental concerns about soil health is needed to fulfill the requirements of full compliance.

Thus, Saudi Arabia receives a score of -1 .⁸²¹⁸

Analyst: Tatum Hillier

⁸²¹⁴ Заморозка внутренних цен на удобрения согласована ФАС, We Like Potato (Moscow) 23 May 2025. Translation provided by Google Translate. Access Date: 9 October 2025. <https://welikepotato.ru/zamorozka-vnutrennih-czen-na-udobreniya-soglasovana-fas/>

⁸²¹⁵ State support for Russian agricultural sector in 2025 will exceed 0.5 trln rubles, Interfax (Moscow) 22 August 2025. Access Date: 9 October 2025. <https://interfax.com/newsroom/top-stories/113404/>

⁸²¹⁶ This score of non-compliance was determined after consulting the following sources: <http://government.ru/en/>, <https://mcx.gov.ru/en/>, <http://minpromtorg.gov.ru/en/>, <http://www.mnr.gov.ru/en/>, <https://www.minobrnauki.gov.ru/>, <https://www.themoscowtimes.com/> and <https://tass.com/>.

⁸²¹⁷ President of COP16 Riyadh: 250,000 Hectares Restored, 115M Trees Set for 2024, Ministry of Environment, Water and Agriculture (Riyadh) 6 December 2024. Access Date: 9 May 2025. <https://www.mewa.gov.sa/en/MediaCenter/News/Pages/News11122020.aspx>

⁸²¹⁸ This score of non-compliance was determined after consulting the following sources: <https://www.mewa.gov.sa/>, <https://www.ifad.org/en/>, <https://www.mofa.gov.sa/ar/Pages/default.aspx>, <https://www.arabnews.com/> and <https://saudigazette.com.sa/>.

South Africa: 0

South Africa has partially complied with its commitment to address the challenges of fertilizer shortages by strengthening local production and trade, increasing fertilizer efficiency, and utilizing biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 10 January 2025, Agriculture Minister John Steenhuisen stated South Africa's ongoing efforts to balance the fertilizer manufacturing industry by promoting organic fertilizers and discouraging inorganic fertilizer user, in addition to bolstering supply chains and distribution channels to facilitate affordable access to quality fertilizers during a side event on African Fertiliser and soil health (AFSH).⁸²¹⁹ Minister Steenhuisen also reaffirmed the commitment to restoring and scaling soil health through institutionalizing regenerative agriculture.

On 24 March 2025, the Department of Science, Technology and Innovation recognized a pioneering hydroponic farming system that reduces fertilizer use by 40 per cent by awarding the innovator, Mogale Maleka, the first prize at the Global Cleantech Innovation Programme – South Africa Awards.⁸²²⁰ This action tackles the challenge of climate change by nurturing cleantech enterprises and supporting resource-scarce regions in their agricultural production with sustainable solutions.

On 27 March 2025, President Cyril Ramaphosa announced the commencement of the Climate Change Act.⁸²²¹ The Act facilitates the development of effective climate change responses and promotes a transition towards a climate-resilient economy. The Act addresses issues within the broader theme of sustainable agriculture, which includes fertilizer challenges; however, it fails to directly tackle the issue of fertilizer shortages.

On 24 April 2025, President Ramaphosa met with Ukrainian President Volodymyr Zelenskyy to discuss strengthening bilateral ties across trade and agriculture, including proposals for a joint mineral hub to produce and transport fertilizers for South Africa.⁸²²²

On 12 June 2025, President Ramaphosa noted Africa's green hydrogen potential to support sustainable agriculture and land use, highlighting projects that link hydrogen production to green fertilizers and industrial applications.⁸²²³ He emphasized that integrating renewable energy with agriculture can drive soil-friendly and climate-resilient farming practices.

On 19 September 2025, Minister Steenhuisen reaffirmed South Africa's support for the G20 Agriculture Ministers' adoption of the Food Security Task Force Declaration, which emphasized leveraging soil-water analytics and efficient irrigation to advance climate-smart and resilient agriculture.⁸²²⁴

⁸²¹⁹ Agriculture Minister John Steenhuisen briefing notes on the side event on African Fertiliser and soil health (AFSH), Department of Agriculture, Land Reform & Rural Development (Pretoria) 10 January 2025. Access Date: 11 July 2025. https://www.nda.gov.za/images/Newsroom/Media%20Releases/2025/agriculture-minister-john-steenhuisen-briefing-notes-on-the-side-event-on-african-fertiliser-and-soi_p67507.pdf

⁸²²⁰ Science, Technology and Innovation on Global Cleantech Innovation Programme South Africa (GCIP-SA) Awards, South Africa Government (Cape Town) 24 March 2025. Access Date: 28 March 2025. <https://www.gov.za/news/media-statements/science-technology-and-innovation-global-cleantech-innovation-programme-south>

⁸²²¹ Cabinet welcomes proclamation on Climate Change Act, South African Government News Agency (Cape Town) 27 March 2025. Access Date: 30 March 2025. <https://www.sanews.gov.za/south-africa/cabinet-welcomes-proclamation-climate-change-act>

⁸²²² South Africa and Ukraine solidify bilateral relations, South African Government News Agency (Cape Town) 24 April 2025. Access Date: 16 November 2025. <https://www.sanews.gov.za/south-africa/south-africa-and-ukraine-solidify-bilateral-relations>

⁸²²³ President Ramaphosa rallies Africa behind Green Hydrogen at inaugural Summit, South African Government News Agency (Pretoria) 12 June 2025. Access Date: 16 November 2025. <https://www.sanews.gov.za/south-africa/president-ramaphosa-rallies-africa-behind-green-hydrogen-inaugural-summit>

⁸²²⁴ SOUTH AFRICA'S G20 PRESIDENCY SECURES GLOBAL COMMITMENTS ON FOOD SECURITY AND PRICE VOLATILITY, Department of Agriculture (Pretoria) 19 September 2025. Access Date: 16 November 2025. https://www.nda.gov.za/images/Newsroom/Media%20Releases/2025/south-africas-g20-presidency-secures-global-commitments-on-food-security-and-price-volatility-19-sep_p33817.pdf

South Africa has partially complied with its commitment to address the challenges of fertilizer shortages by strengthening local production and trade, increasing fertilizer efficiency, and utilizing biofertilizers while addressing the need to improve soil health and minimize water pollution. It has taken moderate action in increasing fertilizer efficiency, broadly affirmed actions that address fertilizer challenges and reiterated ongoing efforts to strengthen local production of fertilizers, using biofertilizers and address environmental concerns about soil health. South Africa has not strong taken steps to engage in international fertilizer trade or address concerns about water efficiency.

Thus, South Africa receives a score of 0.

Analyst: Alison Haoying Yu

Türkiye: -1

Türkiye has not complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increasing fertilizer efficiency, and utilizing biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 25 July 2025, the Ministry of Agriculture and Forestry announced a list of agricultural support payments totaling TRY827 million to be made to farmers.⁸²²⁵ This included roughly TRY1.5 million toward diesel and fertilizer support.

On 8 August 2025, On 25 July 2025, the Ministry of Agriculture and Forestry announced a list of agricultural support payments totaling TRY116 million to be made to farmers.⁸²²⁶ This included roughly TRY40 million toward diesel and fertilizer support.

Türkiye has not complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increasing fertilizer efficiency, and utilizing biofertilizers while addressing the need to improve soil health and minimize water pollution. Türkiye has not taken any tangible actions or steps that advance the key components of the commitment.

Thus, Türkiye receives a score of -1.⁸²²⁷

Analysts: Therese Angeline Reyes and Emanuel Yohannes

United Kingdom: 0

The United Kingdom has partially complied with its commitment to address the challenges of fertilizer shortages by strengthening local production and trade, increasing fertilizer efficiency, and utilizing biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 21 November 2024, the UK's Farm Carbon Toolkit provided tools like carbon footprint calculators for farmers and recommendations on using precision agriculture techniques to optimize fertilizer use, such as employing soil sensors and slow-release fertilizers.⁸²²⁸ This aims to increase fertilizer efficiency, as it minimizes

⁸²²⁵ ÇİFTÇİLERE YAKLAŞIK 827 MİLYON LİRALIK TARIMSAL DESTEKLEME ÖDEMESİ YAPILACAK, Ministry of Agriculture and Forestry (Ankara) 25 July 2025. Access Date: 28 September 2025. <https://www.tarimorman.gov.tr/Haber/6681/Ciftcilere-Yaklasik-827-Milyon-Liralik-Tarimsal-Destekleme-Odemesi-Yapilacak>

⁸²²⁶ 116 MİLYON LİRALIK TARIMSAL DESTEKLEME ÖDEMESİ HESAPLARA AKTARILIYOR, Ministry of Agriculture and Forestry (Ankara) 8 August 2025. Access Date: 28 September 2025. <https://www.tarimorman.gov.tr/Haber/6698/116-Milyon-Liralik-Tarimsal-Destekleme-Odemesi-Hesaplara-Aktariliyor>

⁸²²⁷ This score of non-compliance was determined after consulting the following sources: <https://www.turkiye.gov.tr/>, <https://www.tarimorman.gov.tr/>, <https://www.enerji.gov.tr/>, <https://www.csb.gov.tr/en>, <https://www.dailysabah.com/>, <https://www.hurriyetdailynews.com/> and <https://www.yenisafak.com/en>.

⁸²²⁸ Green Claims Relating to Carbon, Farm Carbon Toolkit (Winchester) 21 November 2024. Access Date: 20 May 2025. <https://farmcarbontoolkit.org.uk/2024/11/21/green-claims-relating-to-carbon/>

nitrous oxide emissions resulting from excess nitrogen use. Additionally, the toolkit encourages farmers to improve sustainability practices within their supply chains that enhance carbon storage in soils.

On 20 February 2025, the UK Environment Agency called on farmers in Devon and Cornwall to take immediate action to prevent soil run-off incidents, which have doubled compared to the same period last year.⁸²²⁹ The agency identified that soil compaction and lack of crop cover were major contributing factors. Farmers have been advised to use proper cultivation equipment, assess land risks and install preventive measures to reduce the impact of run-off on watercourses and properties.

On 17 March 2025, the UK government's Biodiverse Landscapes Fund took action to address fertilizer sustainability by inaugurating biofactories in Guatemala and El Salvador.⁸²³⁰ These biofactories, located in Aldea El Rincón and El Llano respectively, will produce biofertilizers using mountain microorganisms. This initiative supports sustainable agriculture by reducing reliance on chemical fertilizers and reducing their environmental impact through the switch to biofertilizers.

On 7 May 2025, Minister for Food Security and Rural Affairs Daniel Zeichner announced the launch of GBP50 million of grants to improve agricultural productivity through technologies that aid farmers.⁸²³¹ The technologies aim to reduce reliance on chemical fertilizers whilst increasing the efficiency of agricultural practices and maintaining soil health.

On 30 June 2025, the Department for Environment, Food and Rural Affairs announced that funding for farm inspections had doubled as part of a broader drive to reduce agricultural pollution.⁸²³² The department claims that prior inspections allowed farmers to improve fertilizer use, such benefits are expected to continue.

On 15 July 2025, Ambassador Juliana Correa met with Guatemalan Minister of Agriculture, Livestock and Food María Fernanda Rivera to discuss opportunities offered by the UK in the agri-tech sector.⁸²³³ In the meeting, the representatives discussed British solutions for fertilizers, water conservation and agricultural technologies that can aid agriculture in Guatemala. This action reaffirms the UK's commitment to international agricultural trade and sustainable agriculture.

On 10 September 2025, Special Representative for Nature Ruth Davis and Brazilian Deputy Agricultural Minister Cleber Oliveira Soares and the developed a memorandum of understanding that aims to enhance fertilizer production by making it more efficient and sustainable.⁸²³⁴ The partnership aims to do so through collaborative research and development of fertilizers.

The United Kingdom has partially complied with its commitment to address the challenges of fertilizer shortages by strengthening local production and trade, increasing fertilizer efficiency, and utilizing biofertilizers while addressing the need to improve soil health and minimize water pollution. The United Kingdom has

⁸²²⁹ Devon and Cornwall farmers called on to prevent run-off incidents, Government of the UK Environment Agency (London) 20 February 2025. Access Date: 20 May 2025. <https://www.gov.uk/government/news/devon-and-cornwall-farmers-called-on-to-prevent-run-off-incidents>

⁸²³⁰ UK Strengthens Commitment to Biodiversity and Community Development in the Trifinio Region, British Embassy in Honduras (Guatemala City) 17 March 2025. Access Date: 20 May 2025. <https://www.gov.uk/government/news/uk-strengthens-commitment-to-biodiversity-and-community-development-in-the-trifinio-region>

⁸²³¹ £50 million equipment and technology grants to boost food production and farm profitability, Department of Environment, Food & Rural Affairs (London) 7 May 2025. Access Date: 22 June 2025. <https://www.gov.uk/government/news/50-million-equipment-and-technology-grants-to-boost-food-production-and-farm-profitability>

⁸²³² Major boost to cut agricultural pollution, Department for Environment, Food and Rural Affairs (London) 30 June 2025. Access Date: 28 September 2025. <https://www.gov.uk/government/news/major-boost-to-cut-agricultural-pollution>

⁸²³³ UK promotes agricultural cooperation with the Guatemalan Ministry of Agriculture, British Embassy Guatemala City (Guatemala City) 15 July 2025. Access Date: 5 August 2025. <https://www.gov.uk/government/news/uk-promotes-agricultural-cooperation-with-the-guatemalan-ministry-of-agriculture>

⁸²³⁴ UK and Brazil to show global leadership on fertilisers sustainability, Government of the UK Environment Agency (London) 10 September 2025. Access Date: 27 October 2025. <https://www.gov.uk/government/news/uk-and-brazil-to-show-global-leadership-on-fertilisers-sustainability>

showcased a commitment to engagement in international fertilizer trade, addressing environmental concerns about soil health and addressing concerns about water efficiency. However, it has not taken steps to strengthen local production of fertilizers, increase fertilizer efficiency or use biofertilizers.

Thus, the United Kingdom receives a score of 0.

Analyst: Ashiya Dewan

United States: +1

The United States has fully complied with its commitment to address the challenges of fertilizer shortages through strengthening local production, engaging in international trade, increasing fertilizer efficiency, encouraging the domestic use of biofertilizers, and addressing the need to improve soil health and minimize water pollution.

On 18 December 2024, the Department of Agriculture introduced new subsidy programs for small and medium-sized farms to encourage the adoption of biofertilizers.⁸²³⁵ These programs provide financial incentives, training and technical support to farmers transitioning to sustainable agricultural practices.

On 19 December 2024, Department of Agriculture Secretary Tom Vilsack announced USD300 million in funding towards 67 partners in the Regional Agricultural Promotion Program (RAPP), investing in export development in Africa, Southeast Asia and Latin America.⁸²³⁶ RAPP aims to strengthen global agricultural supply chains through the exchange of innovative solutions such as improved fertilizer technologies and sustainable inputs.

On 15 January 2025, the Department of Agriculture announced new guidelines for Technical Guidelines for Climate-Smart Agriculture Crops Used as Biofuel Feedstocks, a standardized template for assessing greenhouse gas emissions from agricultural practices in the United States.⁸²³⁷ This rule allows for more climate-smart agriculture within the United States, emphasizing the need for agrarian practices such as reduced till and no-till, cover cropping and the use of nitrification inhibitors in farming.

On 6 March 2025, President Donald Trump announced adjustments to tariffs on Canada and Mexico, including a reduction from 25 per cent to 10 per cent in tariffs on potash (an ingredient in fertilizers) imports.⁸²³⁸ This adjustment supports domestic farmers secure agricultural input costs, strengthening the local production of fertilizers.⁸²³⁹

⁸²³⁵ USDA Makes Investments to Strengthen American Farms and Businesses, Increase Competition and Lower Costs, Home, December 18, 2024, <https://www.usda.gov/about-usda/news/press-releases/2024/12/18/usda-makes-investments-strengthen-american-farms-and-businesses-increase-competition-and-lower-costs>.

⁸²³⁶ USDA Announces \$300 Million in Additional Regional Agricultural Promotion Program Grants to Diversify U.S. Agricultural Export Markets, Department of Agriculture (Washington, D.C.) 19 December 2025. Access Date: 16 April 2025. <https://web.archive.org/web/20250118131206/https://www.usda.gov/about-usda/news/press-releases/2024/12/19/usda-announces-300-million-additional-regional-agricultural-promotion-program-grants-diversify-us>

⁸²³⁷ USDA Publishes Interim Rule on Technical Guidelines for Climate-Smart Agriculture Crops Used as Biofuel Feedstocks, Department of Agriculture (Washington, D.C.) 15 January 2025. Access Date: 21 April 2025. <https://web.archive.org/web/20250117160530/https://www.usda.gov/about-usda/news/press-releases/2025/01/15/usda-publishes-interim-rule-technical-guidelines-climate-smart-agriculture-crops-used-biofuel>

⁸²³⁸ Fact Sheet: President Donald J. Trump Adjusts Tariffs on Canada and Mexico to Minimize Disruption to the Automotive Industry, The White House (Washington D.C.) 6 March 2025. Access Date: 11 July 2025. <https://www.whitehouse.gov/fact-sheets/2025/03/fact-sheet-president-donald-j-trump-adjusts-tariffs-on-canada-and-mexico-to-minimize-disruption-to-the-automotive-industry/>

⁸²³⁹ Secretary Rollins Thanks President Trump for Trade Actions with Mexico and Canada, United States Department of Agriculture (Washington D.C.) 6 March 2025. Access Date: 11 July 2025. <https://www.usda.gov/about-usda/news/press-releases/2025/03/06/secretary-rollins-thanks-president-trump-trade-actions-mexico-and-canada>

On 26 September 2025, Department of Agriculture and the Antitrust Division of the Department of Justice signed a memorandum of understanding with the goal of enhancing agricultural inputs including fertilizers.⁸²⁴⁰

The United States has fully complied with its commitment to address the challenges of fertilizer shortages through strengthening local production, engaging in international trade, increasing fertilizer efficiency, encouraging the domestic use of biofertilizers, and addressing the need to improve soil health and minimize water pollution. The United States has demonstrated its commitment to improving fertilizer efficiency, strengthening the local production of fertilizers and minimizing environmental impacts through significant investments, international cooperation, research and development, farmer support and environmental regulations.

Thus, the United States receives a score of +1.

Analysts: Therese Angeline Reyes and Emanuel Yohannes

African Union: 0

The African Union has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 1 December 2024, the African Union released the draft version of its Comprehensive Africa Agriculture Development Programme (CAADP) Strategy and Action Plan: 2026-2035.⁸²⁴¹ The plan includes significant commitments to strengthen and enhance access to and use of fertilizers, especially for marginalized groups.

On 20 March 2025, Ambassador Moses Vilakati of the Agriculture, Rural Development, Blue Economy and Sustainable Environment (ARBE) stated at the 14th Africa Fertilizer Financing Mechanism (AFFM) Governing Council Meeting that the department will increase support for the continent's fertilizer industry with tailored financing mechanisms.⁸²⁴² This action increases fertilizer use by improving efficiency across the fertilizer supply chain and improves farming conditions in Africa.

On 25 March 2025, a delegation from the Forum for Agricultural Research in Africa met with the African Union Commissioner for Agriculture, Rural Development, Blue Economy and Sustainable Environment, Moses Vilakati.⁸²⁴³ During the meeting, Commissioner Vilakati reaffirmed his plan to increase fertilizer production and use within Africa, pledging to the full implementation of the Africa Fertilizer and Soil Health Action Plan.

On 7 April 2025, the African Union co-hosted the 6th Africa Climate Talks & SDGs Forum to bolster a unified strategy to finance sustainable green growth and development in Africa.⁸²⁴⁴ This action facilitates member-to-member cooperation on the trade, supply and distribution of fertilizers and other crucial goods for farming.

⁸²⁴⁰ Memorandum of Understanding Between the Antitrust Division, Department of Justice And The Department of Agriculture Relative To Cooperation with Respect to Strengthening Cooperation for Agricultural Inputs, Department of Justice (Washington, D.C.) 26 September 2025. Access Date: 28 October 2025. <https://www.justice.gov/atr/media/1415501/dl?inline>

⁸²⁴¹ CAADP Strategy and Action Plan: 2026-2035, African Union (Addis Ababa) 1 December 2024. Access Date: 30 September 2025. https://rr-africa.woah.org/app/uploads/2025/01/English-CAADP-Strategy-and-Action-Plan-2026-2035_250111_165547.pdf

⁸²⁴² Opening Remarks by H.E Ambassador Moses Vilakati, Commissioner Agriculture, Rural Development, Blue Economy and Sustainable Environment (ARBE) Delivered on the occasion of the 14th Africa Fertilizer Financing Mechanism (AFFM) Governing Council Meeting, African Union (Addis Ababa) 20 March 2025. Access Date: 16 May 2025. <https://au.int/ar/node/44547>

⁸²⁴³ FARA Pays Courtesy Visit to AU's New Commissioner for Agriculture to Align on Strategic Priorities, Forum for Agricultural Research in Africa (Addis Ababa) 25 March 2025. Access Date: 30 September 2025. <https://faraafrica.org/2025/03/26/fara-pays-courtesy-visit-to-aus-new-commissioner-for-agriculture-to-align-on-strategic-priorities/>

⁸²⁴⁴ 6th Africa Climate Talks & SDGs Forum Theme: Financing Climate Actions for Sustainable Green Growth and Development in Africa: A Justice Issue, African Union (Addis Ababa) 7 April 2025. Access Date: 14 May 2025. <https://au.int/es/node/44551>

On 19 June 2025, the African Union Semi-Arid Food Grain Research and Development (AU-SAFGRAD) organized a four-day workshop to support the implementation of the 10-year CAADP Strategy and Action Plan.⁸²⁴⁵ This action enhances the efficiency of fertilizer usage by promoting collaboration on technology and the inclusion of underprivileged groups.

On 27 June 2025, Commissioner Vilakati met with European Union Commissioner for Agriculture and Food Christophe Hansen at the sixth African Union-European Union Agriculture Ministerial Conference in Rome.⁸²⁴⁶ Commissioner Vilakati announced that during the meeting, he had signed the EU Mission Soil Manifesto, building on work undertaken at the 2024 Africa Fertiliser and Soil Health Summit. Among other things, this manifesto aims to ensure that Africa can produce regional fertilizers tailored to local soil conditions.

On 1 September 2025, the African Union Development Agency-NEPAD (AUDA-NEPAD), the African Union Commission (AUC), AGRA, the Forum for Agricultural Research in Africa (FARA) and the Coalition of Implementors for Fertilizer and Soil Health (CIFSH) launched the Africa Fertilizer Industry Development Association on the sidelines of the Africa Food Systems Forum 2025.⁸²⁴⁷ This initiative marks a step towards improving soil health and fertilizer access for smallholder farmers across the African subcontinent.

The African Union has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. It has taken action in strengthening the local production of fertilizers through financing mechanisms and investments in technology, promoting fertilizer efficiency and addressing environmental concerns about soil health. However, it has not taken strong action in the other components of the commitment.

Thus, the African Union receives a score of 0.

Analyst: Alison Haoying Yu

European Union: 0

The European Union has partially complied with its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency, and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution.

On 9 December 2024, the Council of the European Union approved a set of conclusions for a farmer focused continuation of their Common Agricultural Policy.⁸²⁴⁸ These conclusions aim to work towards a competitive, crisis-proof, sustainable, farmer friendly and knowledge-based future European agriculture amid the rising costs of agricultural inputs such as fertilizers.⁸²⁴⁹

⁸²⁴⁵ Delivering the Kampala Strategy for Agricultural Research & Development (R&D) in Africa: From Commitment to Action, African Union (Addis Ababa) 19 June 2025. Access Date: 3 July 2025. <https://au.int/es/node/44971>

⁸²⁴⁶ Joint press release by EU Commissioner Christophe Hansen, and African Union Commissioner Moses Vilakati, European Commission (Brussels) 27 June 2025. Access Date: 30 September 2025. https://agriculture.ec.europa.eu/media/news/joint-press-release-eu-commissioner-christophe-hansen-and-african-union-commissioner-moses-vilakati-2025-06-27_en

⁸²⁴⁷ Africa Steps Up Fertilizer and Soil Health Agenda to Secure Food Future, International Fertilizer Development Center (Washington D.C.) 15 September 2025. Access Date: 16 November 2025. <https://ifdc.org/2025/09/15/africa-steps-up-fertilizer-and-soil-health-agenda-to-secure-food-future/>

⁸²⁴⁸ A competitive EU farming sector based on a farmer-focused common agricultural policy: Council approves conclusions, European Council (Brussels) 9 December 2024. Access Date: 27 March 2025. <https://www.consilium.europa.eu/en/press/press-releases/2024/12/09/a-competitive-and-farmer-focused-common-agricultural-policy-council-approves-conclusions/>

⁸²⁴⁹ The common agricultural policy explained, European Council (Brussels) 29 January 2025. Access Date: 9 May 2025. <https://www.consilium.europa.eu/en/policies/the-common-agricultural-policy-explained/>

On 27 January 2025, the European Commission announced the establishment of the European Board on Agriculture and Food.⁸²⁵⁰ This board aims to become a medium of communication for the farming community, other actors in the food supply chain and civil society to ensure government policies align with initiatives in the private sector.

On 19 February 2025, the European Commission presented its Vision for Agriculture and Food.⁸²⁵¹ This vision aims to make the EU's agriculture sector more competitive and resilient by addressing concerns about pesticide usage, food security and water efficiency.

On 10 April 2025, the European Council reached a provisional deal with the European Parliament on a directive establishing a framework for soil monitoring.⁸²⁵² This directive aims to work towards improving soil resilience and management to achieve the non-binding goal of healthy soils by 2050.

On 12 June 2025, the European Council announced the adoption of new tariffs on Russian and Belarusian agricultural goods, including fertilizers.⁸²⁵³ This action weakens the global fertilizer supply chain by increasing trade barriers between Russia and Belarus and the EU.

On 27 June 2025, European Union Commissioner for Agriculture and Food Christophe Hansen at the sixth African Union-European Union Agriculture Ministerial Conference in Rome met with African Union Commissioner for Agriculture, Rural Development, Blue Economy and Sustainable Environment, Moses Vilakati.⁸²⁵⁴ Commissioner Vilakati announced that during the meeting, he had signed the EU Mission Soil Manifesto, building on work undertaken at the 2024 Africa Fertiliser and Soil Health Summit. Among other things, this manifesto aims to ensure that Africa can produce regional fertilizers tailored to local soil conditions.

The European Union has partially complied its commitment to address the challenges of fertilizer shortages, including through strengthening local production, trade, increase fertilizer efficiency and utilize biofertilizers while addressing the need to improve soil health and minimize water pollution. The EU has taken weak action to increase fertilizer and water efficiency and improve soil health.

Thus, the European Union receives a score of 0.

Analyst: Nicole Chi Yan Tsang

⁸²⁵⁰ European Commission establishes the European Board on Agriculture and Food, European Commission (Brussels) 27 January 2025. Access Date: 27 March 2025. https://agriculture.ec.europa.eu/media/news/european-commission-establishes-european-board-agriculture-and-food-2025-01-27_en

⁸²⁵¹ Commission presents its roadmap for a thriving EU farming and agri-food sector, European Commission (Brussels) 19 February 2025. Access Date: 13 May 2025. https://ec.europa.eu/commission/presscorner/detail/en/ip_25_530

⁸²⁵² Soil monitoring law: Council reaches deal with Parliament, European Council (Brussels) 10 April 2025. Access Date: 13 May 2025. <https://www.consilium.europa.eu/en/press/press-releases/2025/04/10/soil-monitoring-law-council-reaches-deal-with-parliament/>

⁸²⁵³ Trade: EU adopts new tariffs on Russian and Belarusian agricultural goods and fertilisers, European Council (Brussels) 12 June 2025. Access Date: 30 September 2025. <https://www.consilium.europa.eu/en/press/press-releases/2025/06/12/trade-eu-adopts-new-tariffs-on-russian-and-belarusian-agricultural-goods-and-fertilisers/>

⁸²⁵⁴ Joint press release by EU Commissioner Christophe Hansen, and African Union Commissioner Moses Vilakati, European Commission (Brussels) 27 June 2025. Access Date: 30 September 2025. https://agriculture.ec.europa.eu/media/news/joint-press-release-eu-commissioner-christophe-hansen-and-african-union-commissioner-moses-vilakati-2025-06-27_en