

GLOBAL FOOD SECURITY

When the Strait Closes, Africa Starves: The Coming Fertilizer Crisis

Conflict in the Middle East has shut down the world's most critical trade corridor for fertilizers. For the hundreds of millions of smallholder farmers across Africa who have no alternative, the consequences could be catastrophic.

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In the middle of a narrow stretch of water that is barely 33 kilometres wide at its narrowest point lies one of the most consequential chokepoints on earth. The Strait of Hormuz, flanked by Iran and Oman, is not merely an energy corridor. It is, increasingly, the artery through which the world's fields are fed. And right now, it is effectively closed.

The conflict that erupted in the Persian Gulf in early 2026 has triggered what the United Nations Food and Agriculture Organisation's chief economist is calling "one of the most severe shocks to global commodity flows in recent years." But this is not simply an energy story, or even a geopolitical one. It is a food story and for the hundreds of millions of people across sub-Saharan Africa who depend on imported fertilizers to grow enough to eat, it may become one of the most consequential humanitarian crises of this decade.

The Chokepoint That Feeds the World

To understand why a conflict in the Persian Gulf threatens harvests in Kenya, Mozambique, and Burkina Faso, you first need to understand the remarkable geography of global fertilizer production.

Countries including Iran, Qatar, Saudi Arabia, the UAE, and Bahrain sit atop some of the world's largest natural gas reserves. Natural gas is both the feedstock and the primary energy source for producing ammonia, the building block of all nitrogen fertilizers. This geographic accident has made the Gulf the undisputed capital of the world's fertilizer supply chain.

GULF REGION'S SHARE OF GLOBAL FERTILIZER TRADE (2023–2025)

34%	Of global urea trade: Iran, Qatar, Saudi Arabia, UAE and Bahrain combined
23%	Of global ammonia trade from those same five nations
18%	Of global ammonium phosphate (DAP/MAP) trade
20%	Of all globally traded liquefied natural gas (LNG), a key fertilizer feedstock
30%	Of all internationally traded fertilizers passed through the Strait of Hormuz

Prior to the escalation of hostilities in late February 2026, the Strait carried approximately 20 million barrels of oil per day, around 35 percent of global crude oil flows, alongside this enormous share of fertilizer trade. Within days of the conflict intensifying, tanker traffic through the waterway collapsed by more than 90 percent.

"We need synthetic fertilizer production to feed 8 billion people. Without it, the global population would only be half as large as it is today."

World Economic Forum, citing agricultural science consensus, 2026

This is not hypothetical risk. It is current reality. The World Economic Forum has noted that this moment echoes, and may exceed, the fertilizer supply shock triggered by Russia's invasion of Ukraine in 2022. "Honestly, I think it's worse," one senior analyst told the Forum.

Price Shock: The Numbers Are Stark

Markets have already registered the disruption with alarming speed. In the first week of March 2026 alone, Middle East granular urea prices rose by 19 percent. Egyptian urea prices surged by 28 percent in the same period. By the World Bank's reckoning, urea prices spiked by nearly 46 percent month-on-month between February and March 2026.

Yara International, one of the world's largest fertilizer companies, has warned that urea prices have risen by 60 to 70 percent amid the crisis, with African importers among the most exposed buyers on the planet. The FAO projects that global fertilizer prices could average 15 to 20 percent higher across the first half of 2026 if disruptions persist. The World Bank's own projection is even more alarming: a 31 percent price increase for 2026, driven primarily by urea costs.

THE NON-LINEAR DANGER

Fertilizer use follows a non-linear yield response. This means that even modest reductions in fertilizer application produce disproportionately large declines in crop yields, particularly in regions where baseline usage is already dangerously low. The FAO has calculated that even a 10 percent reduction in fertilizer availability could result in up to 25 percent less maize, rice, and wheat grown across sub-Saharan Africa.

Farmers, as the FAO's chief economist Máximo Torero has observed, are now facing a dual cost shock: more expensive fertilizers alongside rising fuel costs that affect the entire agricultural value chain, from irrigation pumps to transport trucks to cold storage. Many are expected to reduce fertilizer application, shift toward less productive crops, or simply not plant at all.

Africa's Structural Vulnerability

No region of the world is more exposed to this crisis than sub-Saharan Africa. The reasons are structural, compounding, and largely invisible to the international community until a crisis of this scale forces attention.

Approximately 80 percent of the fertilizer used across sub-Saharan Africa is imported and often purchased at prices substantially higher than those paid in Europe, owing to freight costs, financing barriers, and logistical constraints. When global supply falters, African farmers feel the shock first, hardest, and longest.

The scale of Africa's fertilizer use compared to the rest of the world is striking. Fertilizer nutrient use in sub-Saharan Africa averages less than 20 kilograms per hectare. The global average is 135 kilograms per hectare. Egypt reaches 414 kg/ha. The contrast is not a gap; it is a chasm. And it means that African smallholder farmers are already farming at the margins of what is agronomically viable. Any further reduction in fertilizer access does not merely reduce yields marginally; it can collapse them.

AFRICA'S FERTILIZER USE VS. THE WORLD

20 kg	Fertilizer per hectare — sub-Saharan Africa's average
135 kg	Fertilizer per hectare — global average
414 kg	Fertilizer per hectare — Egypt's application rate
-25%	Fertilizer use fell across Africa after Russia's Ukraine invasion (2022)
37	African countries using less than 25 kg/ha — already critically below effective thresholds

It is the people at the centre of this system, the smallholder farmers, who carry the greatest weight. Smallholder farmers produce nearly 70 percent of sub-Saharan Africa's food supply. Unlike large commercial operations with financial reserves to secure supply months in advance, smallholders typically purchase fertilizer close to the planting season, at whatever price the market offers, using whatever cash or credit is available. When prices spike by 46 or 60 percent, those farmers are priced out entirely.

The Countries at Greatest Risk

While the crisis affects the whole of sub-Saharan Africa, certain countries face a convergence of risks that makes their situation particularly acute. The FAO has specifically identified Somalia, Kenya, Tanzania, and Mozambique as especially exposed. The International Fertilizer Development Centre (IFDC), after conducting a rapid supply-gap inventory in March 2026, identified the following risk profile:

COUNTRY FERTILIZER RISK ASSESSMENT — SUB-SAHARAN AFRICA, 2026		
Burkina Faso	Landlocked; severe import dependency; inadequate logistics	CRITICAL RISK
Senegal	High import dependency; supply gaps >30% of national requirement	CRITICAL RISK
Somalia	FAO-designated; high import reliance + pre-existing food crisis	CRITICAL RISK
Niger	Landlocked; dependent on regional transit; limited fiscal buffers	CRITICAL RISK
Ghana	Estimated supply gaps of 15–30%; medium-to-high import exposure	HIGH RISK
Côte d'Ivoire	Moderate-high demand; supply disruptions emerging	HIGH RISK
Kenya	FAO-designated exposed nation; heavy fertilizer import dependence	HIGH RISK
Mozambique	FAO-designated; historically low yields and import dependence	HIGH RISK

The broader situation is already dire before this crisis adds further pressure. The World Food Programme reports that more than 87 million people are currently facing hunger in East and Southern Africa. An additional 52 million are projected to be acutely food insecure in West and Central Africa by mid-2026.

A Global Bidding War Africa Cannot Win

Perhaps the most troubling dimension of this crisis has been articulated by Svein Tore Holsether, Chief Executive of Yara International. He has warned that geopolitical tensions are creating the conditions for a "global auction" of fertilizer supplies in which wealthier nations will consistently outbid lower-income ones.

This is not a failure of the market. It is the market operating exactly as designed. Fertilizer will go to whoever can pay most. European and North American farmers, backed by government subsidy programmes and access to credit, will secure their supply. African smallholder farmers who are working on margins of a few dollars per day, in countries with limited fiscal space and currency pressures will not.

"Of the 45 million more people projected to tip into hunger if the conflict doesn't end by mid-year, nearly two-thirds live in Africa and Asia. That would bring the global total to 363 million — the worst hunger crisis on record."

World Food Programme, April 2026

Supply chain disruptions are already forcing humanitarian agencies to reroute food and aid supplies around the Cape of Good Hope, which is adding weeks to delivery times and substantial costs to operations already strained by funding shortfalls. In Somalia, the crisis is threatening to cripple the country's vital livestock export trade to the Middle East, while pushing local oil and food prices up by as much as 20 percent.

None of This is Without Precedent

In 2022, Russia's invasion of Ukraine triggered a fertilizer shock that caused African fertilizer use to plunge by 25 percent. In that year, the World Food Programme estimated that cereal production fell by 16 percent in East Africa, raising the region's food insecure population by 6 to 7 million people. Countries such as Côte d'Ivoire, Kenya, Nigeria, and South Africa saw some of the steepest drops in fertilizer use globally.

Before that, COVID-19 pandemic disruptions had already exposed how dependent global food systems had become on a handful of export hubs and bottlenecked transport routes. Each crisis has generated urgent statements, emergency facilities, and calls for structural reform. The African Development Bank launched a US\$1.5 billion African Emergency Food Production Facility in 2022, a genuine intervention that has supported nearly 16 million smallholder farmers in 35 countries and generated 46 million tonnes of food worth US\$19 billion.

THE STRUCTURAL PARADOX

90%	Of Africa's mineral fertilizers are imported — despite Africa being a net fertilizer exporter
10	African countries control 97% of continental fertilizer exports — supply is highly concentrated
36%	Intra-African fertilizer trade — rising, but far from sufficient
+45%	Added to retail fertilizer prices by shipping from Mombasa to Kigali alone

What Must Change and What Businesses Can Do

The FAO's immediate calls are clear: establish alternative trade corridors, provide emergency financial support to import-dependent countries, ensure farmers have access to credit, and avoid export restrictions that would further tighten global supply. These are necessary but insufficient.

The Africa Fertilizer and Soil Health Initiative, adopted at the African Union's 2024 Summit, sets a ten-year goal to triple fertilizer use across the continent, double cereal yields, and restore a third of degraded soil. Achieving these targets requires not just political will, but sustained private sector investment in African fertilizer infrastructure, regional distribution networks, digital farming advisory systems, and alternative soil health approaches.

For businesses operating in or sourcing from Africa, the implications are direct. Supply chain disruptions, rising input costs, and declining smallholder productivity will ripple into the agricultural commodities, consumer goods, and financial services sectors alike. Food price inflation driven by fertilizer shortages does not stay at the farm gate but moves through markets, destabilises household budgets, and creates the conditions for social unrest.

"The next fertilizer crisis is inevitable. Whether it becomes a food crisis depends on what we invest in now."

International Fertilizer Development Centre (IFDC), April 2026

The IFDC's framing deserves to be taken seriously by every business that operates in global markets, sources agricultural commodities, employs people across the Global South, or simply believes that a world in which 363 million people go hungry is not a world in which sustainable commerce can flourish.

A fragile global food system is not an externality. It is a risk that lives on every balance sheet.

THIS ISSUE DEMANDS A BUSINESS RESPONSE

This is not a distant crisis... it is happening now, in the fields that determine the next harvest. Through BBS, companies can act where it matters most: getting inputs to farmers in time, reaching last-mile communities, and preventing missed planting windows that drive long-term loss.

When farmers are priced out, yields fall, incomes collapse, and supply chains weaken, consequences the world has seen before when production fails to meet need. When farmers are supported in time, communities stabilise, markets function, and future supply is secured.

BBS enables targeted, measurable action at this critical moment by bridging immediate need and long-term resilience.

The choice is clear: we act now to support farmers and communities or face the consequences of inaction that history has already shown.

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