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Research article

RUSSIAN FERTILIZERS AS AN ELEMENT OF STRENGTHENING AFRICA’S FOOD SOVEREIGNTY

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Abstract. Over the past few years, amid the pandemic and other crises in the world markets, food security in Africa has once again become a key issue in international relations. However, what is important for the food sovereignty of the continent is not only the uninterrupted supply of food but also the gradual localization of food production in Africa, which requires increased fertilizer consumption, making the transition from the concept of “food security” to “food sovereignty” relevant. In general, it can be argued that the problem of Africa’s food sovereignty is not related to land scarcity but primarily to Africa’s position in the global value chains in the world’s food markets, as well as its dependence on imports of semi-finished food products. The key role in maintaining import dependence is played by influential lobbying and financial groups, intermediaries linked to transnational corporations, traders, and a number of other international actors. Structural imbalances in economic development have so far prevented most African countries from producing fertilizers domestically, which has led to an increase in fertilizer imports. In recent years, Russian exporters have managed to significantly strengthen their presence in African food and agricultural markets, bringing their share of the African fertilizer market to 20%. This article deals with the main trends of the movement toward food sovereignty in Africa, primarily considering the role of fertilizers in this process. For the first time, an analysis of the strategies of major Russian fertilizer suppliers in Africa is provided.

Keywords: Africa, food sovereignty, famine, fertilizers, food security, Russian-African relations

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FROM FOOD SECURITY TO FOOD SOVEREIGNTY

Africa's growing population – the main factor that will determine the development of African countries, the state of their economies, and their political influence in the medium term – leads not only to urbanization, infrastructure development, import and consumption growth, but also to structural imbalances [Abramova 2014; Fituni 2017]. One of the key challenges is the overloading of food supply systems, which can further destabilize the socio-economic environment [Abdelradi 2021: 3]. Food crises have repeatedly led to upheavals in African countries: for example, one of the key factors that led to the Arab Spring was the lack of food [Soffiantini 2020], and as a result of the provoked events Egypt, Libya, Tunisia were set back in their development for years.

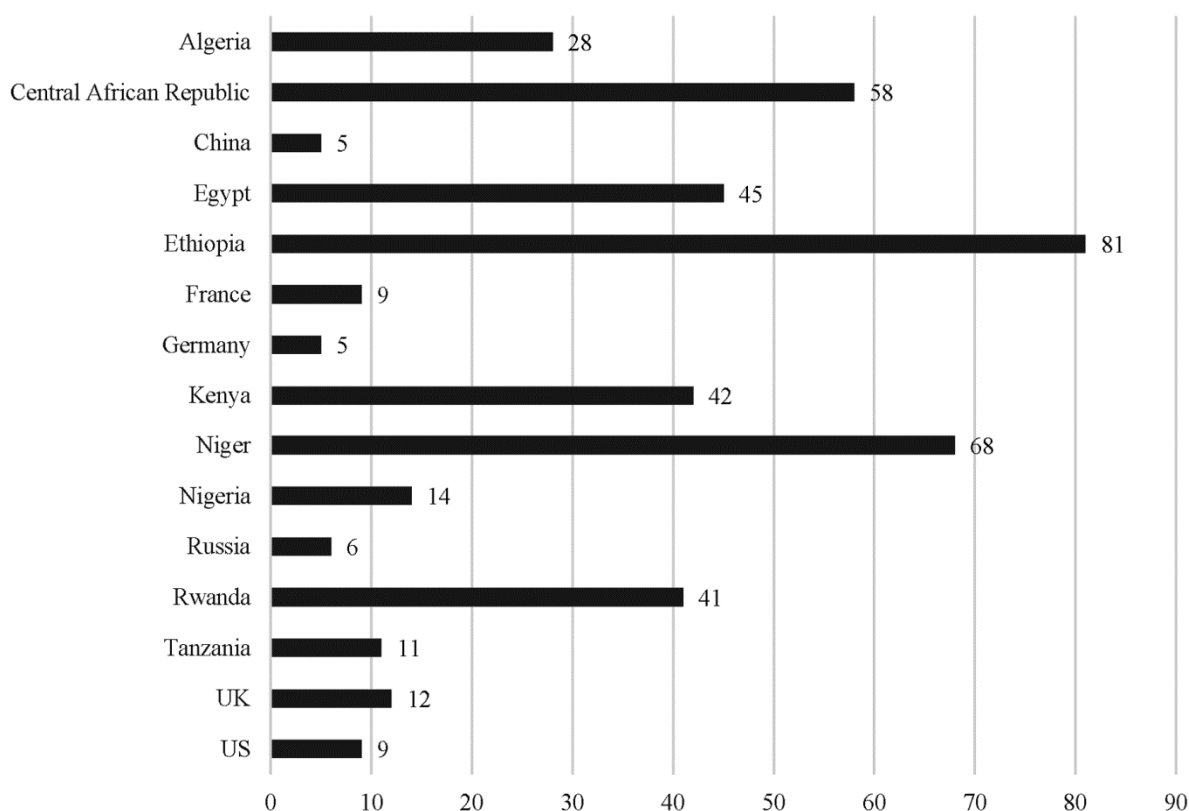


Fig. 1. Ratio of food imports to total exports for selected countries (%), cf. 2019-2021)

Source: Compiled by authors from FAO data¹.

The food issue is facing growing securitization [Abbs 2019], and its global nature shows that the solution to this problem lies at the international level. Until recently, the leadership in setting the agenda in this area belonged to the Western countries (mainly

¹ FAOSTAT. fao.org/faostat (accessed: 15.02.2024)

through international institutions). In 1996, at the headquarters of the Food and Agriculture Organization of the United Nations (FAO) in Rome, the World Food Summit was held, where the concept of “food security” was defined. According to its declaration, it is considered achieved when people at all times have physical and economic access to sufficient, safe and nutritious food that meets their dietary needs and food preferences for an active and healthy life². While this approach has taken hold and the definition of “food security” has become widely accepted, it is not without a number of significant shortcomings. This definition of food security reduces it to an “access problem” [Shepherd 2012: 197], which, in turn, allows the most influential actors (i.e. primarily Western states, corporations, traders) to use it for their own purposes (formation of surplus stocks, purchase of agricultural land in developing countries).

The actors most actively securitizing the issue of food security again, the Western countries, are facing food oversupply. They remain the main exporters of food to Africa, maintaining this status as a lever of political pressure, as well as guaranteeing long-term demand for their own products on dynamically growing markets. More than half of the African countries spend a significant proportion of their export earnings (up to 80%) on food purchases (*Figure 1*): as recently as 1980, Africa’s food trade balance was virtually zero, but the amount of food produced per capita has been gradually declining [Rakotoarisoa, Iafrate, Paschali 2011].

With the gradual shift of the centers of political power from the North to the South, the alternative idea of an independent food policy is being promoted more and more often. Instead of increasing food imports, which implies the notion of food security, the development of national production is proposed. One of the first organizations to conceptualize this idea was the association *La Via Campesina*³. In its interpretation, food sovereignty was used as a “response” to the model of food relations that emerged after the 2007–2008 crisis, characterized by the association as “socially unjust and environmentally unsustainable” [Trauger 2015: 100]. According to its definition⁴, food sovereignty prioritizes local agricultural production; the right to introduce protectionist measures aimed at protecting local producers and markets from foreign agricultural producers dumping prices; the right of the population to participate in decision-making in the agricultural policy of the state, etc.

A complete transition to the concept of food sovereignty, which in a radical form proposes the establishment of food self-sufficiency, is still unrealizable, because the countries of the African continent are too dependent on their partners, not only Western ones.

The idea of “collective food security systems” proposed by Russian scholar Anastasia Likhacheva seems promising. Justifying the need for interregional

² Rome Declaration on World Food Security. *FAO*. <https://www.fao.org/3/w3613e/w3613e00.htm> (accessed: 15.02.2024)

³ *La Vía Campesina* (Spanish: “the peasant way”) is an international farmers’ organization founded in 1993 in Mons, Belgium, formed by 182 organizations from 81 countries. It proclaims itself an international movement coordinating peasant organizations of small and medium-sized producers, agricultural workers, rural women, and indigenous communities in Asia, Africa, the Americas, and Europe.

⁴ What is Food Sovereignty? *La Via Campesina*. <https://viacampesina.org/en/food-sovereignty/> (accessed: 15.02.2024)

cooperation within the Global South, she rightly notes⁵ the indivisibility of food security: “famine in Ethiopia or supply disruptions in Egypt – tomorrow and the day after tomorrow mean problems in Russia or India”, which means “missed opportunities for more advanced cooperation, complex industrial cooperation, postponement of a more just world order”. These systems imply the creation of food reservation infrastructure on the consumer side, the establishment of financial, technical and logistical infrastructure to support such cooperation, the development of common standards and requirements, and so on. This idea could be realized, for example, under the umbrella of BRICS+. The member countries have repeatedly noted the need to join efforts to stabilize the food market in order to ensure food security, and in the summer of 2023, in addition to South Africa, two new African countries – Egypt and Ethiopia – joined the association. This concept also echoes J. Galtung's ideas of “collective self-reliance” [Galtung 1977: 10] as applied to the Global South, and can help to address the complex of problems that trigger food crises in Africa.

OBSTACLES TO FOOD SOVEREIGNTY IN AFRICA

Africa is dependent on imports of basic categories of food commodities, some of which are impossible or very difficult to localize. For example, most African countries found themselves in the so-called wheat trap [Andrae 1985: 73]. Since colonial times, wheat, poorly suited to the climatic conditions of African countries, has been replacing traditional food crops in the diet. The process intensified with independence and economic growth, which created a westernized class of city dwellers – consumers of wheat products. And they, in turn, created a demand for wheat, which is extremely difficult to substitute with local produce. The import and the programs designed to reduce dependence on it have attracted the attention of influential lobbyists that exist in a certain interdependence.

Given the extent of their import dependence, African countries export a diverse range of agricultural commodities in significant quantities, including cocoa, coffee, tea, and tobacco. These are export-oriented categories that make a minimal direct contribution to food security issues. However, contrary to stereotypes [Gavrilova 2023], they do not represent the key factor determining food deficit: despite the fact that quite large areas are allocated for their cultivation, the share of these areas in the total structure of agricultural land put into use is relatively small [Ambalam 2014]. For example, while Africa's agricultural land area is estimated at 100–120 million hectares, according to the FAO, in 2021, at least 8 million hectares were allocated to cocoa, 5 million hectares to coffee, and 0.4 million hectares to tea. By comparison, sorghum has an area of 29 million hectares. Thus, based on the FAO data, cocoa, coffee, and tea plantations occupy only about 10% of agricultural land⁶. That is, it can be argued that the problem of Africa's food sovereignty is not related to land scarcity, but primarily to Africa's position in global production chains in world food markets.

⁵ Likhacheva A.B. It's tastier together, or, the prospects of collective food security. *Russia in Global Affairs*. 2024. <https://www.globalaffairs.ru/articles/vmeste-vkusnee/> (In Russ.). (accessed: 12.04.2024)

⁶ FAOSTAT. fao.org/faostat (accessed: 30.04.2024)

The key role in maintaining import dependence is played by influential lobbying and financial groups, intermediaries, intertwined with transnational corporations, traders and a number of international actors. They are interested in prioritizing imports over domestic production, advocating for the abolition or reduction of customs levies, using various multilateral platforms (WTO/GATT) and regional economic communities as instruments of pressure [Anderson 1995]. In turn, extra-regional actors are not inclined to support the establishment of food reservation, delivery and distribution systems on importers' side.

One of the main solutions for African countries is localization. This requires the purchase of agricultural machinery, the ploughing of new territories suitable for farming, “precision agriculture”⁷, the introduction of geo-information systems, the revision of tariff policies within regional economic communities [Kuhlmann, Sechler, Guinan 2011] and the emerging African Continental Free Trade Area. After all, tariff liberalization, in the process of implementation of which extra-regional players (USA, EU, etc.) are actively involved, may lead not to the growth of intra-African trade but to easier access to regional markets for non-African suppliers, undermining the competitiveness of African producers [Morozenskaya 2019].

FERTILIZER USE FOR FOOD SOVEREIGNTY

Increased fertilizer consumption will allow African countries to come closer to solving the problem of excessive dependence on imports and to achieve self-sufficiency in certain food categories. Structural imbalances in economic development and institutional weaknesses have prevented most African countries from producing fertilizers in sufficient quantities on their territories, which has led to an increase in fertilizer imports. Russia is the world’s second largest producer of mineral fertilizers and is interested in the continent's comprehensive development. The growth of the agricultural sector in African countries could contribute to the increase in imports from Russia of non-commodity goods: fertilizers, agricultural machinery, vaccines, other equipment, as well as services: in education, agro-technology, engineering, digitalization [Maslov 2021: 94]. Russian companies, which have already become key players in the fertilizer market in Africa, are setting ambitious targets to increase their market share. Moreover, fertilizer supplies from Russia to Africa are accompanied by a fairly consistent strategy of Russian companies that complement commercial supplies with humanitarian aid and educational programs. The models of interaction with Africa that Russian fertilizer exporters have developed are distinctive and warrant a comprehensive examination.

Sub-Saharan Africa is the region with the highest hunger rates, with 1/5 of the population still facing malnutrition. The continent already spends more than \$75 billion a year on food and raw materials for agricultural sector and depends on imports for many commodities⁸.

⁷ Precision agriculture refers to computer and satellite-based technologies and systems that can rationalize and optimize the use of raw materials and resources.

⁸ About Dakar 2 Summit. *African Development Bank Group*. <https://www.afdb.org/en/dakar-2-summit-feed-africa-food-sovereignty-and-resilience/about-dakar-2-summit> (accessed: 15.02.2024)

Table 1. **Top 5 African countries specializing in agricultural production**

| Country / region | Agriculture, forestry and fisheries, value added (% of GDP, 2022) | Employment in agriculture (% of total employment, 2022) |
|----------------------------|---|---|
| Sierra Leone | 60,4 | 43 |
| Niger | 42,0 | 71 |
| Ethiopia | 37,6 | 64 |
| Mali | 36,4 | 68 |
| Comoros | 36,4 | 35 |
| Sub-Saharan Africa average | 17,3 | 52 |

Source: Compiled by authors from World Bank data⁹.

Table 1 summarizes the five countries whose economies depend on the agricultural sector. However, the average data for Sub-Saharan Africa show a traditional trend for the continent: the majority of the population engaged in this field produces small amounts of output needed either by the household itself or by the village [Ba 2016]. Therefore, while a considerable proportion of the population is employed in agriculture, its contribution to GDP remains relatively insignificant. For example, in Kenya and in Nigeria about 33% of the working-age population is employed in agriculture, yet its contribution to GDP is only 22%, in South Africa – 21% to 2.5% [Maslov 2023: 56].

The 2006 African Ministers of Agriculture meeting in Abuja, Nigeria, set a target of increasing average fertilizer use from 8 kg/ha to 50 kg/ha¹⁰. However, even as of 2022, fertilizer use has increased to 22 kg/ha¹¹, yet it has not reached the target. In countries such as Uganda, Guinea, the Republic of Congo, the Democratic Republic of Congo, Niger and the Central African Republic, it is still less than 5 kg/ha [UNDP 2022]. At the same time, a number of countries managed to achieve significant growth in fertilizer use between 2005 and 2015: Ethiopia (from 11 kg/ha to 24 kg/ha), Ghana (from 20 to 35), Kenya (from 33 to 44) [Kalinichenko 2019: 204]. *Figure 2* shows average fertilizer application volumes in other regions and in the world for comparison. The United Nations Development Programme (UNDP) estimates that achieving the goal of increasing fertilizer use could triple Africa's food production in the short term and reduce malnutrition by almost 5% [UNDP 2022].

Some of the reasons constraining fertilizer consumption in Africa include: shortage of foreign exchange, rising fertilizer prices, high transportation costs, low skill level of professionals involved in the agricultural sector and lack of modern technologies and solutions, dependence on subsidies, etc. The price factor is of paramount importance. On average, African countries pay 30–40 times more for imported inorganic fertilizers than, for example, Thailand [Kalinichenko 2019: 204]. The primary factor contributing to this

⁹ World Bank. data.worldbank.org/ (accessed: 15.02.2024)

¹⁰ Malpass D. A Transformed Fertilizer Market is Needed in Response to the Food Crisis in Africa. *World Bank*. 21.12.2022. <https://blogs.worldbank.org/voices/transformed-fertilizer-market-needed-response-food-crisis-africa> (accessed: 15.02.2024)

¹¹ Ibid.

phenomenon is the cost of transportation and delivery to end consumers, which results in additional financial costs that can reach up to half of the final cost of the products [UNDP 2022].

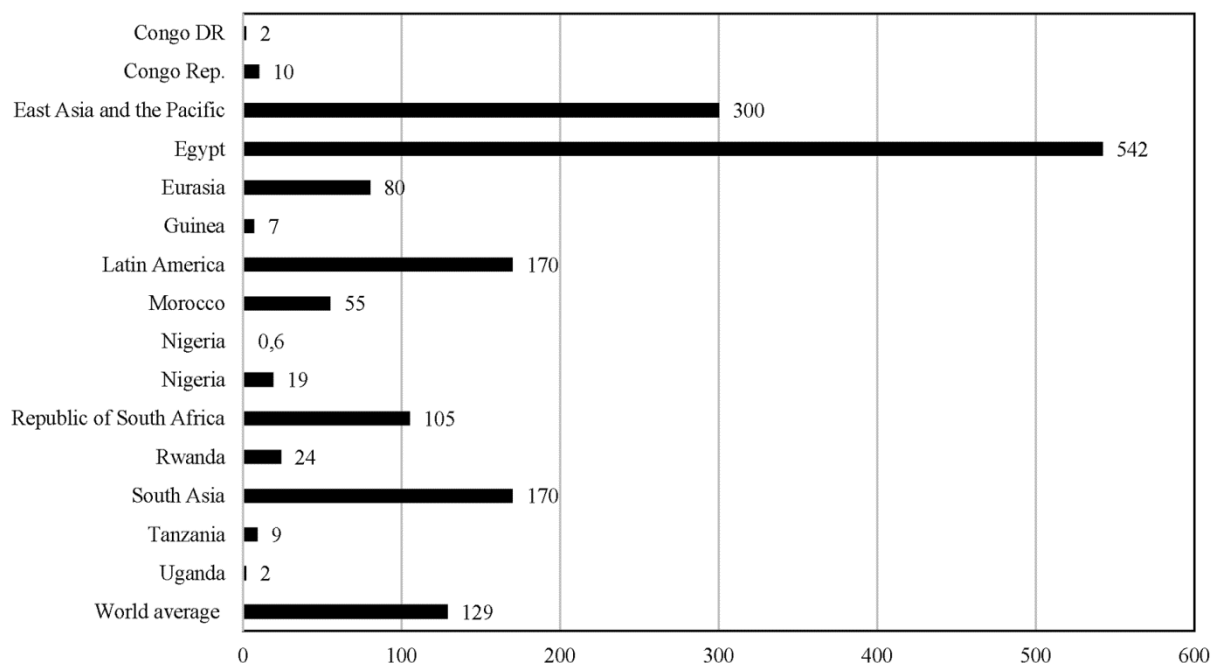


Fig. 2. **Fertilizer application in selected countries and regions (kg/ha).**

Source: Compiled by authors from UNDP data [UNDP 2022].

Africa is a net importer of fertilizers, ranking second after Latin America. According to FAO, nitrogen fertilizers account for more than half (56%) of Africa's imports (see *Table 2*). The quantity of nitrogen fertilizers purchased in 2020 exceeded 3 million tons. This type of fertilizer is the least expensive and is applied prior to sowing for top dressing. Subsequently, potash (approximately 1.3 million tons) is applied during the vegetative growth phase of the plants. They guarantee the quality of the fruit and assist in coping with temperature fluctuations. Phosphate fertilizers take the last place (1.2 million tons), although sequentially they are used after nitrogen fertilizers, because they ensure metabolism and improve the quality of photosynthesis in plants.

Table 2. **Fertilizer imports to Africa (2020)**

| Fertilizers type | Volume (metric tons) | Share (%) |
|------------------|----------------------|-----------|
| Nitrogen | 3 175 994 | 56 |
| Potash | 1 292 808 | 23 |
| Phosphate | 1 219 861 | 21 |

Source: Compiled by authors from FAO data¹².

¹² FAOSTAT. fao.org/faostat (accessed: 15.02.2024)

According to the International Fertilizer Association (IFA), fertilizer consumption in Africa in 2020 is estimated at 7.7 million tons. The largest consumers are Egypt (22%), South Africa (14%), Ethiopia (10%), Nigeria (9%) and Morocco (5%)¹³. The International Fertilizer Industry Association forecasts that Africa will be the leader in fertilizer demand growth over the next five years.

As for their use directly in agriculture, the data differ slightly from imports (see *Figure 3*). Phosphate fertilizers (1.7 million tons) moved from third to second place. This is due to the fact that, although in relatively small volumes, African countries themselves are engaged in fertilizer production. Producers include countries such as Egypt, Tunisia, South Africa, Algeria, Nigeria and Morocco. Although most fertilizer produced is exported outside the continent, the African Development Bank's 2019 report also shows expected growth in inland production of nitrogen and phosphate fertilizers¹⁴. At the end of four years, phosphate fertilizer production in Africa increased slightly due to investments by Morocco's OCP Group (OCP S.A.) in phosphate mining and processing in Morocco, while nitrogen fertilizer production stagnated due to the freezing of key fertilizer projects (e.g., in Angola and Nigeria) due to the lack of gas in the domestic market.

According to the U.S. Geological Survey, Africa has up to 80% of the world's phosphate reserves, Africa produces 250 billion cubic meters of gas annually (about 1,000 cubic meters of gas are needed to produce 1 ton of ammonia), but is dependent on fertilizer imports, providing about 90% of its consumption through imports¹⁵.

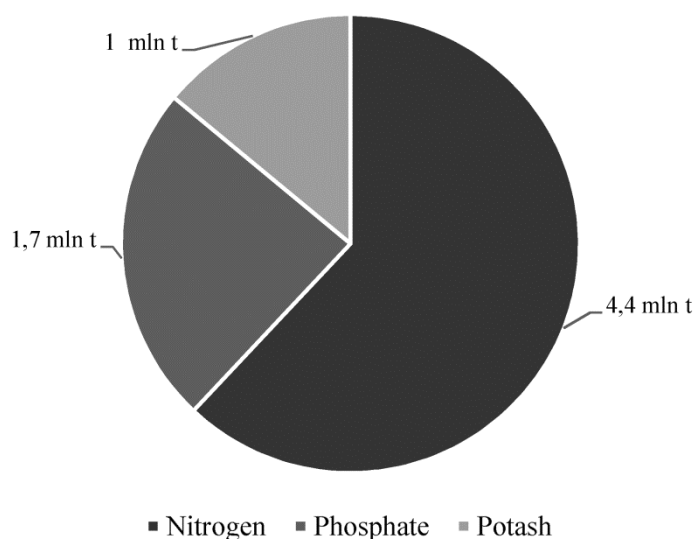


Fig. 3. **Structure of fertilizer consumption in Africa by active ingredient type, 2020.**

Source: Compiled by authors from FAO data¹⁶.

As on any commodity market, Africa's fertilizer market is driven by multinational companies – global fertilizer suppliers. The external environment makes Africa directly

¹³ IFASTAT. ifastat.org (accessed: 15.02.2024)

¹⁴ The 2019 Annual Report. *African Development Bank Group*. <https://www.afdb.org/en/annual-report-2019/2019-annual-report> (accessed: 15.02.2024)

¹⁵ IFASTAT. ifastat.org (accessed: 15.02.2024)

¹⁶ FAOSTAT. fao.org/faostat (accessed: 15.02.2024)

dependent on events that are not directly related to it. For example, the global crisis, which worsened with the start of a special military operation in Ukraine in 2022, led to an increase in fertilizer prices, complications related to sanctions against Russian suppliers and other restrictions (difficulties with payments in euros and dollars, restrictions on Russian suppliers' access to Western-controlled transport, logistics and insurance infrastructure).

African countries have a very limited set of tools to promote fertilizer use. For most countries on the continent, subsidies, either direct or indirect, are the mainstay of government fertilizer policy [Jayne, Shahidur 2013], and education programs to explain the benefits of fertilizer application to farmers are also common. Infrastructure development, such as transport systems and fertilizer production and blending facilities development, is less common.

In general, government support tools are isolated – in most cases, targeted support to the industry in the form of point subsidies is not followed by measures to develop transport and logistics infrastructure, localization of urea and phosphate production, etc. In fact, subsidies cover the costs associated with internal problems – disorganization of transport systems, lack of information on soil conditions, insufficient level of education of farmers, low technical equipment of farms, and shortage of irrigation systems.

RUSSIAN FERTILIZERS IN AFRICA

Fertilizers are one of the main commodities Russia supplies to Africa. In value terms, their exports have grown almost 32 times over the past 18 years, reaching \$511 million in 2021 Federal Customs Service of the Russian Federation¹⁷. It has become one of the fastest growing commodity categories in Russia's exports to the continent.

In physical terms, the explosive growth in shipments occurred from 2018. By 2022, exports more than doubled from 770,000 tons to 1.6 million tons, thus Russia's share of the African fertilizer market reached about 20%¹⁸. For comparison, Russia's share in petroleum supplies to Africa is 3%, grain – 32%, armaments and military equipment – 49%.

At the same time, the share of Russian exporters still lags far behind the supply volumes of the leading companies. For example, Morocco's OCP supplies about 2 million tons of phosphate fertilizers to Africa annually¹⁹, while Norway's Yara supplies 1 million tons (mainly urea but also complex fertilizers)²⁰.

Nevertheless, fertilizers are becoming one of the key areas of Russia-Africa cooperation, especially against the backdrop of growing attention to food security issues,

¹⁷ Federal Customs Service of the Russian Federation. <https://customs.gov.ru/statistic> (accessed: 25.04.2024)

¹⁸ Russia has doubled fertilizer supplies to Africa in five years and is ready to increase them. *TASS*. 27.07.2023. (In Russ.). <https://tass.ru/ekonomika/18372429> (accessed: 15.02.2024)

¹⁹ The OCP Group Dedicates 4 Million Tons of Fertilizers to Strengthen Food Security in Africa. *OCP*. 12.10.2022. <https://ocpgroup.ma/press-release-article/ocp-group-dedicates-4-million-tons-fertilizers-strengthen-food-security> (accessed: 15.02.2024)

²⁰ On course to a nature-positive food future. *Yara Integrated Report*. 2022. <https://www.yara.com/site-assets/investors/057-reports-and-presentations/annual-reports/2022/yara-integrated-report-2022.pdf> (accessed: 15.02.2024)

which is confirmed by the prominent role of this topic in bilateral Russian-African high-level and top-level negotiations [Gavrilova 2022]. The points on fertilizers are included in the preamble of the Declaration of the Second Russia-Africa Summit. The Parties express “deep concern over the challenges related to global food security, including the rise in food and fertilizer prices, as well as the disruption of international supply chains, which disproportionately impact the African continent”, as well as welcome “the determination of the Russian Federation to continue providing assistance to African States in order to address issues related to the provision of food, fertilizers and energy resources, as well as carry out international development assistance projects”²¹. Expanding fertilizer supplies (along with other food products) is the subject of a separate item in the Russia-Africa Partnership Forum Action Plan for 2023–2026²². In comparison, the Declaration of the First Summit 2019 does not mention fertilizers²³.

The growing role of Russian exporters in supplying fertilizers to Africa makes it possible to use this leverage for political, humanitarian and reputational purposes. For example, the group Uralchem-Uralkali plans to use 300,000 tons²⁴ of its fertilizers blocked in Riga, Ghent and other ports of the European Union countries due to the sanctions for gratuitous deliveries to African countries. In November 2022, 20,000 tons of fertilizers were supplied to Malawi; in April 2023, 34,000 tons to Kenya; in December 2023, 34,000 tons to Nigeria, and 23,000 tons to Zimbabwe. These deliveries are carried out in cooperation with the United Nations World Food Program (WFP). About 96,000 tons of fertilizers remain blocked²⁵.

In fact, it was the first humanitarian deliveries of Uralchem to African countries in late 2022 and early 2023 that tested the model of gratuitous supplies of food products to Africa from Russia. This initiative was further developed by the initiative of gratuitous deliveries of 25–50 thousand tons of grain to Burkina Faso, Zimbabwe, Mali, Somalia, Central African Republic and Eritrea, announced by the President of the Russian Federation Vladimir Putin at the Russia-Africa summit. Prior to this, the provision of Russian food aid to Africa was largely conducted through intermediaries, including the WFP, FAO, the International Committee of the Red Cross, and other international organizations. Russia's involvement was primarily limited to financial contributions to the funds of these organizations.

In this context, not only the humanitarian and reputational component of gratuitous aid is important (according to various estimates, the cost of Russian grain supplies to Africa ranges from \$40 million to \$85 million²⁶, fertilizers – about or more than \$60 mil-

²¹ Declaration of the Second Russia-Africa Summit. *President of Russia*. 28.07.2023. <http://en.kremlin.ru/supplement/5972> (accessed: 25.04.2024)

²² Russia–Africa Partnership Forum Action Plan for 2023–2026. *President of Russia*. 28.07.2023. <http://en.kremlin.ru/supplement/5971> (accessed: 15.02.2024)

²³ Declaration of the First Russia-Africa Summit. *Roscongress*. 24.10.2019. <https://summitafrica.ru/en/about-summit/declaration/> (accessed: 15.02.2024)

²⁴ Which is slightly less than the group annual exports to Africa, 371,000 tons in 2022.

²⁵ Head of the Russian Foreign Ministry Department: the geography of flights to Africa will expand. *TASS*. 13.02.2024. (In Russ.). <https://tass.ru/interviews/19962213> (accessed: 15.02.2024)

²⁶ A generous gift: Putin promised to supply Africa with less than a percent of the grain harvest. *Forbes*. 28.07.2023. (In Russ.). <https://www.forbes.ru/prodovolstvennaya-bezopasnost/493647-sedryj-podarok-putin-poobesal-postavit-v-afriku-men-se-procenta-ot-urozaa-zerna> (accessed: 15.02.2024)

lion²⁷). Russian companies and government agencies gain experience in interacting with African and international counterparties, independently chartering ships, determining the geography of supplies, distribution of delivered shipments and delivery to end users. In the case of Uralchem, it is likely that the company's commercial interests were also considered, more precisely, its interest in entering or expanding its presence in target markets.

Although the fertilizer factor has only recently emerged in the political arena, Russian companies have long been present in African fertilizer markets in relatively large numbers. Analysis of data from the Federal Customs Service (FCS)²⁸ and the Russian Association of Fertilizer Producers identifies the main companies supplying fertilizers from Russia to Africa. In 2022, these included PhosAgro (540,000 tons), EuroChem (400,000 tons), *Uralchem* and other group companies (Uralkali and Togliattiazot) (371,000 tons), and Acron (291,000 tons). SDS Azot, Almaz Udobrenia and others also supply fertilizers to Africa in smaller volumes and on a less regular basis.

The quantitative growth of fertilizer shipments from Russia to Africa is due to the comprehensive work of Russian business with end consumers in Africa and international organizations. The fertilizer sector is particularly strong compared to other commodities exported by Russia to Africa, such as grain or oil products. In the case of the latter, in most cases Russian exporters used the global infrastructure: intermediaries, international traders, etc. Thus, the share of Russian supplies remained volatile, depending on price fluctuations and agreements of third parties. The "Russian" component of such supplies was diluted, and the role of Russian companies was reduced to a position at the very beginning of global supply chains²⁹.

The case of fertilizers provides an illustrative example of the activities of three major Russian suppliers to Africa: PhosAgro, Uralchem, and EuroChem. These companies, through a combination of GR and PR methods of working directly with importers, humanitarian projects and partnerships with international organizations, have managed to become key players in the African fertilizer market.

For example, PhosAgro has been actively using its network of partnerships with international education organizations to grow its business on the continent. In 2019, PhosAgro was an official partner in the launch of the African Soil Laboratory Network (AFRILAB) as part of the Global Soil Protection Initiative, a joint project between PhosAgro and FAO³⁰. As of July 2023, the African network had 143 laboratories in 48 countries that assess the quality and safety of fertilizers and monitor soil health. As a follow-up to the laboratory network initiative, in October 2020, PhosAgro launched the global Doctors for Soil program in partnership with FAO, which includes the production of agricultural toolkits – soil kits. They allow farmers to independently assess the con-

²⁷ The estimate was made by the authors of the article on the basis of average fertilizer prices and is given for illustrative purposes.

²⁸ The FCS database was analyzed using data through 2022.

²⁹ The situation is mirrored in the supply of African goods to Russia: for example, coffee and tea, cacao beans, etc., which are delivered through intermediaries in the EU and other countries, rather than directly.

³⁰ PhosAgro's total financial contribution to the establishment of regional laboratory networks in Latin America, Asia, the Middle East and Africa amounted to \$2.4 million according to the Interdivisional Committee on Green Chemistry for Sustainable Development, ICGCSD. *IUPAC*, 2021. <https://iupac.org/wp-content/uploads/2021/08/ICGCSD-presentation20210810-compressed.pdf> (accessed: 15.02.2024)

dition of their fields and determine the nutrients that need to be applied to maximize yields. Finally, in 2023, in time for the Russia-Africa summit, the company launched Pro Agro Lectorium, an online lecture platform in English, Russian, and Portuguese – an online service with lectures for farmers on sustainable agriculture, the basics of mineral plant nutrition, and the correct use of mineral fertilizers. The main target audience of the educational platform is African farmers. Lecturers include scientists and experts from Benin, Egypt, Ethiopia, Gambia, Zimbabwe and other countries.

In addition to the educational component, PhosAgro is attempting to invest in building the infrastructure for its presence in African markets, forming partnerships with local businesses and moving to build sales networks. In 2019, it launched a regional office in Cape Town, South Africa; registered a subsidiary, PhosAgro South Africa; and signed a memorandum of cooperation with South African fertilizer producer Kropz; in 2020, two warehouses in Cape Town and Durban began operating to sell fertilizers to local consumers at the small wholesale levels; in 2023, the *Vedomosti* newspaper reported on PhosAgro's plans to expand its fertilizer distribution network in Africa and establish a fertilizer packing and packaging facility³¹.

Uralchem-Uralkali Group is also developing relations with African countries. The group's activity increased in 2018. In February of that year, Deputy Chairman of the Board of Directors and controlling shareholder of the companies Dmitriy Mazepin visited Southeast Africa and held meetings with the presidents of Zimbabwe and Zambia; in December 2018, he met with President Uhuru Kenyatta in Kenya. On January 31, 2018, Uralkali Trading and Nigeria's Notore Chemicals signed a memorandum of understanding for the supply of potash³². In 2019, ahead of the Russia-Africa summit, Mazepin held talks with the President of Mozambique, Filipe Nyusi. He also met with the President of Zimbabwe, Emmerson Mnangagwa.

In 2019 Uralchem and Uralkali established a joint company for fertilizer trading in Africa – United Fertilizers Company Limited with an office in Mauritius. In early 2020 Mazepin met in Khartoum with Sudanese Vice President Lt. Gen. Mohamed Hamdan Dagaala and Prime Minister Abdullah Hamduk.

Uralkali's attempts to enter the Nigerian potash fertilizer market culminated in the signing of a potassium sulphate supply contract with the Nigeria Sovereign Investment Authority (NSIA) in 2019. From 2017 to 2020³³, NSIA implemented the Presidential Fertilizer Initiative, a government program launched in 2016 by Nigerian President Muhammadu Buhari aimed to localize NPK fertilizer production and import substitution via blending in Nigeria. The signing of the contract with NSIA was one of the few examples of Russian companies working in Africa within the framework of government programs for the import of certain categories of goods³⁴.

³¹ Phosagro plans to double fertilizer supplies to Africa by 2025. *Vedomosti*. 27.03.2023. (In Russ.). <https://vedomosti.ru/business/articles/2023/07/27/987128-fosagro-planiruet-udvoit-postavki-udobrenii-v-afriku> (accessed: 15.02.2024)

³² Listing by Introduction. Notore Chemical Industries Plc, 2018. https://notore.com/wp-content/uploads/2023/07/Notore_Listing_Memorandum_02082018.pdf (accessed: 15.02.2024)

³³ In 2020, the program was transferred to the Nigerian Ministry of Finance.

³⁴ Another example is the participation of LUKOIL's trader LITASCO in the supply of petroleum products to Nigeria under the government's DSDP (crude oil for petroleum products swap).

As a result of the contract, Uralkali remained a monopoly supplier of potash fertilizers to Nigeria from 2019 to 2021 – in value terms, supplies amounted to \$47 million in 2020 and \$41 million in 2021. While South Africa was PhosAgro's stronghold in Africa, Uralkali's stronghold was Nigeria, where the company planned to open a representative office in 2021 and was considering setting up production facilities. However, sanctions in 2022 became an obstacle to the company's operations in the country, potash shipments under the NSIA contract were reduced (to \$16 million), and Nigeria had to purchase spot shipments of fertilizer from Canada³⁵.

The activity of other Russian exporters in Africa is much lower, but they are also making sporadic attempts to develop business in the region. For example, in 2018 EuroChem signed a contract for off-take of potassium sulphate from the Kolluli mine in Eritrea, but production has not yet started. In late 2022, EuroChem founder Andrey Melnichenko visited South Africa, where, according to media reports, he discussed with local politicians the lifting of sanctions on fertilizer supplies to Africa³⁶. In 2021, Acron announced the development of new grades of NPK complex fertilizers specifically for West and East Africa.

CONCLUSION

The turbulent transition period, which will inevitably lead to a new shape of the world order, requires a reorganization of national, regional and global development trajectories. Africa, still largely dependent on the Global North, no longer wants to remain on the periphery, but rather seeks not only to apply the most advanced technologies, but also to become their creators and suppliers. But today, even in the food sector, African countries remain dependent on European lifestyles and food habits. The implementation of the concept of food security, promoted most actively by the countries of the Global North, has contributed to the fact that today at least 82% of the staple foods imported into Africa come from outside the continent³⁷.

African elites seeking sovereignty are looking for ways to reduce their dependence on food imports, as the succession of global and regional crises has highlighted Africa's vulnerability. Africa is home to the largest number of hungry people (after Asia), and price volatility has already negatively impacted and contributed to ongoing economic and socio-political destabilization. In 2022, three of the five countries with the largest proportion of their populations facing the threat of starvation are in Africa – Somalia, the Democratic Republic of the Congo and Sudan. The quest for food sovereignty, expressed not only in full food self-sufficiency but also in freedom of dietary choice, will thus be one of the key “peaks” that Africa will have to reach on the road to full economic and political independence.

³⁵ Exclusive: Nigeria Buys Emergency Canadian Potash to Replace Lost Russian Supply. *Reuters*. 03.05.2022. <https://reuters.com/world/africa/exclusive-nigeria-buys-emergency-canadian-potash-replace-lost-russian-supply-2022-05-03/> (accessed: 15.02.2024)

³⁶ Melnichenko urged South African politicians to press EU to solve fertilizer supply problem. *TASS*. 28.12.2023. (In Russ.). <https://tass.ru/ekonomika/16707013> (accessed: 25.04.2024)

³⁷ Akiwumi P. Revitalizing African agriculture: Time for bold action. *UNCTAD*. 30.09.2022. <https://unctad.org/news/blog-revitalizing-african-agriculture-time-bold-action> (accessed: 15.02.2024)

Nevertheless, Africa does not yet have the resources necessary to achieve full food self-sufficiency. Steps towards food sovereignty will continue to be taken with the support of third countries and international organizations, but a new type of partnership should help African countries to reduce their dependence on foreign products by promoting intra-continental production, which cannot be increased without increased fertilizer application.

Russian companies and government authorities can play an important role in the new system of collective food security, and BRICS+ can serve as a platform for discussing possible ways to achieve food sovereignty in Africa, as the number of African member countries has increased to three since the Johannesburg Summit in 2023.

Russia, as one of the largest fertilizer producers in the world, is ready to contribute to the internal development of African countries and has already stepped up its activities in this area. Analysis of Russia's presence in the fertilizer markets has shown the relative effectiveness of the measures taken and the real contribution that Russian suppliers make to ensuring food sovereignty in Africa. The successful work of Russian companies has allowed Russia to become one of the leading sources of fertilizers for African countries and make a real contribution to Russian-African relations. Russian industry business has managed to introduce such tools for creating an ecosystem around the core business profile as research funding, educational programs, creation of associations, NGOs, etc. Despite the fact that the largest competitors (OCP, Yara, ETG, etc.) have been implementing similar initiatives for a long time and even on a larger scale, it should be noted that for Russian business in Africa (except for military-technical cooperation, which is of a somewhat different nature), the experience of Russian fertilizer suppliers can certainly be called a breakthrough.

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РОССИЙСКИЕ УДОБРЕНИЯ КАК ЭЛЕМЕНТ УКРЕПЛЕНИЯ ПРОДОВОЛЬСТВЕННОГО СУВЕРЕНИТЕТА АФРИКИ

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Аннотация. За последние несколько лет на фоне пандемии и других кризисных явлений на мировых рынках проблема обеспечения продовольственного суверенитета стран Африки вновь приобрела ключевое значение для международных отношений. Однако для

продовольственного суверенитета важно не только и не столько обеспечение бесперебойных поставок продовольственных товаров, но и постепенная локализация их производства в Африке, что требует увеличения потребления удобрений, в связи с чем актуальным становится переход от концепции «продовольственной безопасности» к «продовольственному суверенитету». В целом можно утверждать, что проблема продовольственного суверенитета Африки связана не с дефицитом земель, а в первую очередь с положением Африки в глобально-производственных цепочках на мировых рынках продовольствия, зависимостью от импорта уже готовой продукции. Ключевую роль в сохранении зависимости от импорта играют влиятельные лоббистские и финансово-промышленные группы, посредники, сросшиеся с транснациональными корпорациями, трейдерами и рядом международных акторов. Структурные дисбалансы экономического развития пока не позволяют большинству стран Африки производить удобрения на своей территории, что обуславливает рост их импорта. За последние годы российским экспортерам удалось значительно укрепить свое присутствие на африканских рынках продовольствия и сельскохозяйственных товаров, доведя долю в поставках удобрений до 20%. В рамках данной статьи проанализированы основные тенденции на пути достижения продовольственного суверенитета странами Африки в первую очередь в контексте динамики потребления и внесения удобрений, впервые в научной литературе приводится анализ стратегии крупнейших российских экспортеров на рынках удобрений стран Африки.

Ключевые слова: Африка, продовольственный суверенитет, голод, удобрения, продовольственная безопасность, российско-африканские отношения

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