Fertiliser ordering: why timing matters this season

Communication from the Farming Fertiliser Stakeholder Group

At a Glance

- Due to geopolitical issues, the fertiliser market has been disrupted this year.
- The issue is not simply whether fertiliser exists somewhere in the market.
- The real challenge is whether enough fertiliser can be imported, manufactured, stored, processed, bagged, loaded and delivered to farms in time for the spring application window.
- If too many orders are left until later in the season, the supply chain may not be able to process and deliver everything quickly enough.

Early discussions with suppliers help the whole system plan ahead and reduce the risk of delivery bottlenecks. This is a timely reminder that time, production capacity and delivery capacity are limited.

The issue

Many farmers are understandably cautious about committing to fertiliser purchases too early. Prices, cropping decisions, cash flow, weather and wider market uncertainty all influence buying decisions.

However, the fertiliser supply chain has a practical limitation: it cannot process all seasonal demand at the last minute.

Fertiliser must move through several stages before it reaches the farm. Product may need to be manufactured or imported, moved through ports, stored safely, blended or bagged, scheduled for transport, and delivered to individual farms. Each of these stages has a limit. There are only so many ships, stores, blending plants, bagging lines, loading points, lorries and drivers available at any one time.

This means that delaying an order does not simply move the same volume into a later month without consequence. It compresses demand into a shorter period. Once that happens, even a normally functioning supply chain can become congested.

Why this year is more complicated

This season is not starting from a normal position.

In recent years, Russian-origin fertiliser and raw materials have formed part of global supply flows. Those stocks are now less straightforward for the market to rely on because of the

continuing effects of war, sanctions, banking restrictions, trade uncertainty, and wider concerns about origin and availability.

At the same time, disruption in the Gulf region has added pressure to the global nitrogen market. The region is important because it is closely linked to natural gas, ammonia, urea and sulphur supply chains. These are key building blocks for fertiliser manufacture. Even where the UK is not directly dependent on Gulf product, disruption in the region can affect global trade flows, pricing and competition for alternative cargoes.

As a result, the market has less flexibility than it would normally like. Product that might previously have been available from one origin may not be available on the same terms, at the same time or with the same confidence. If major global buyers compete for alternative supply, smaller markets such as the UK can become exposed to tighter availability and higher replacement costs.

This does not mean fertiliser is unavailable in the UK today. However, it does mean the system has less spare capacity to absorb late demand, sudden buying surges or disruption in raw material supplies.

Why spring nitrogen is especially sensitive

Straight nitrogen is particularly exposed because it is needed within a relatively short spring application window. Product delivered after the crop needs it has limited practical value.

Industry capacity means the volume of solid straight nitrogen used in the GB market would require a very long delivery period.

In simple terms, the industry cannot safely assume that most spring nitrogen requirements can be ordered late and still arrive exactly when needed.

What happens if everyone waits?

If a large proportion of farmers wait until later in the season before ordering, three things can happen.

First, suppliers may have less confidence to import, manufacture or hold stock in advance. Fertiliser is costly to buy, move and store, so the supply chain needs demand signals early enough to plan effectively.

Second, manufacturing and raw material supply can become less predictable. If demand is weak or delayed, production may be reduced, diverted to other markets or paused. Once that happens, it may not be simple to restart supply quickly when farmers decide they need product.

Third, storage, processing and haulage capacity can become a limiting factor. Even where product is available, it still has to be stored, blended, bagged, loaded and delivered. Once

delivery demand is concentrated into a short period, the number of available vehicles and delivery slots becomes one of the main constraints.

The result can be a frustrating situation where product may be available somewhere in the supply chain but cannot be manufactured, processed or moved to every farm quickly enough.

Delayed ordering could create a late-season pinch point. If that happens, the problem may not be a lack of willingness to supply. It may simply be that there is not enough time, processing capacity or haulage capacity left to move the required tonnage onto farms before it is needed.

Next steps: planning ahead

Suppliers are available to speak with farmer customers as early as possible about likely requirements, even if final decisions on crop nutrient requirements, expected tonnages and product types are still being shaped.

Early engagement gives suppliers a clearer picture of demand and helps the whole supply chain plan imports, raw material purchasing, manufacturing, storage, processing and deliveries more effectively.

These conversations also help identify safe, suitable on-farm storage arrangements and avoid the assumption that late orders can always be delivered immediately.

Many suppliers have indicated a willingness to support earlier deliveries by supplying part loads and coordinating split loads with local farmers to avoid additional transport costs.

Farmers are encouraged to speak to a range of fertiliser suppliers to identify who is best placed to meet the specific needs of their farm business. As ever, farmers are encouraged to test soils and review likely crop nutrient requirements early.

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UK Fertiliser Farming Stakeholder Group attendees:

- Agricultural Industries Confederation
- Agriculture and Horticulture Development Board
- Country Land and Business Association
- Department for Environment Food and Rural Affairs
- Farmers' Union of Wales
- National Farmers' Union
- National Farmers' Union Cymru
- National Farmers' Union Scotland
- Northern Ireland Grain Trade Association
- Tenant Farmers Association
- Ulster Farmers' Union

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