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Ladies and Gentlemen,

It's my pleasure to welcome everyone here.

This is a great event for discussing about fertilizer business.

I Hamed Khoram the CEO of Armaiti Group feel extremely pleased to see you here

I would like to express my appreciation for the opportunity to talk with you

About

Middle East Urea trade flows

Which

have a major portion of the World fertilizer market.

As a business company, our team exclusively works on Urea, so I'm gonna just discuss about Urea.

We are ready to cooperate with the companies worldwide, Asia, Europe, Africa, and other regions.

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I wanna talk about

Introduction on gas and urea fertilizer in the Middle East,

Middle East urea Production,

Consumption,

New capacities,

Export and Import target Markets.

Today, Middle East is strategically valuable for its fossil fuel region, Oil and Gas.

As we all know a [third of the world's oil and gas](#) is produced in the Middle East.

As we know Urea production volume in the world is 230mt per year. In which the MEA with 27.5mt has a 12% portion of this volume.

And also from 51mt urea trading, 17mt belongs to the Middle East. That is 33% of total urea trading of the world. This is a remarkable point. And should be considered in details.

Now I'm gonna explain more about urea production in the Middle East:

Iran is the largest with 8.369mt production rate.

Then is **Qatar** with

After that is **Saudi Arabia** with

Forth is **Oman** with rate of production

Then is **the UAE** which produces mt

Interesting to know is that the Middle East is producing 11% of all metric tons of urea worldwide. So The major producing countries here are Iran, Qatar and Saudi Arabia.

According to detailed reports, 20% of Middle East urea production is Prilled, and 80% is Granular. So we can say that the Middle East region is granular region.

Also Out of 27mt urea production in the Middle East, 10mt is for domestic consumption and rest of it goes for export. So it is the world's largest exporting region, with exports of over 17 million tonnes, 33% of the whole world. Which I explain more in the target market part.

at produce about 7.5 mt, 2.5 million tons for domestic consumption and about 5 million tons for export.

6 Urea projects are being added to Iran's market with 7.5 mt capacity,

Therefor

the total urea production will be 15 mnt and export is expected to reach about 12 mnt by 2030.

New capacities

About 6mt is going to add to Middle East capacity. Considering the consumption growth in the region and India import decrease, the middle eastern producers must pay more attention to new target markets.

In this part, Iran's target market is analyzed. As you see in the middle east export market, Nola, Brazil and India have the largest portion of export.

India is very important for Middle East from the distance point and target urea market.

Look at the left table, India has a plan for decreasing urea imports in the near future.

Import has decreased about 3mt from 2021 to 2023. Which is happened through increasing domestic producing and using of Nano-urea in their farming.

The right table is about India CFR and Middle East FOB. This shows the Middle East has an average price of 15-20\$/MT in comparison to others.

Price Analysis

Here it shows the chart of the Middle East price analysis in recent 5 years.

After a drastic growth on prices in 2021 and some periods of 2022, the market progressed with the tolerance of 40-50\$/mt.

According to the conflict in the Middle East prices are a little decrease. And I guess even if there is no tension, again we will see more price reduction.

In this slide we can see the producers in the Middle East in the right side.

And their netbacks comparing to US market and Brazil Market.

At the end

I would like to thank you all my friends
for listening.

And also

My special thanks to the planner, the hard working team, for organizing this useful and nice event.

Thank you very much