

Building Namibia's Integrated Marine Phosphate Industry: *to Fuel Economic Diversification and Value Creation*



Namibian Marine Phosphate
(Pty) Ltd



CHAMBER OF MINES OF NAMIBIA



***“Is essential for life
and has no substitute.”***

Chris Jordinson

Mike Woodborne

Phosphate is Indispensable

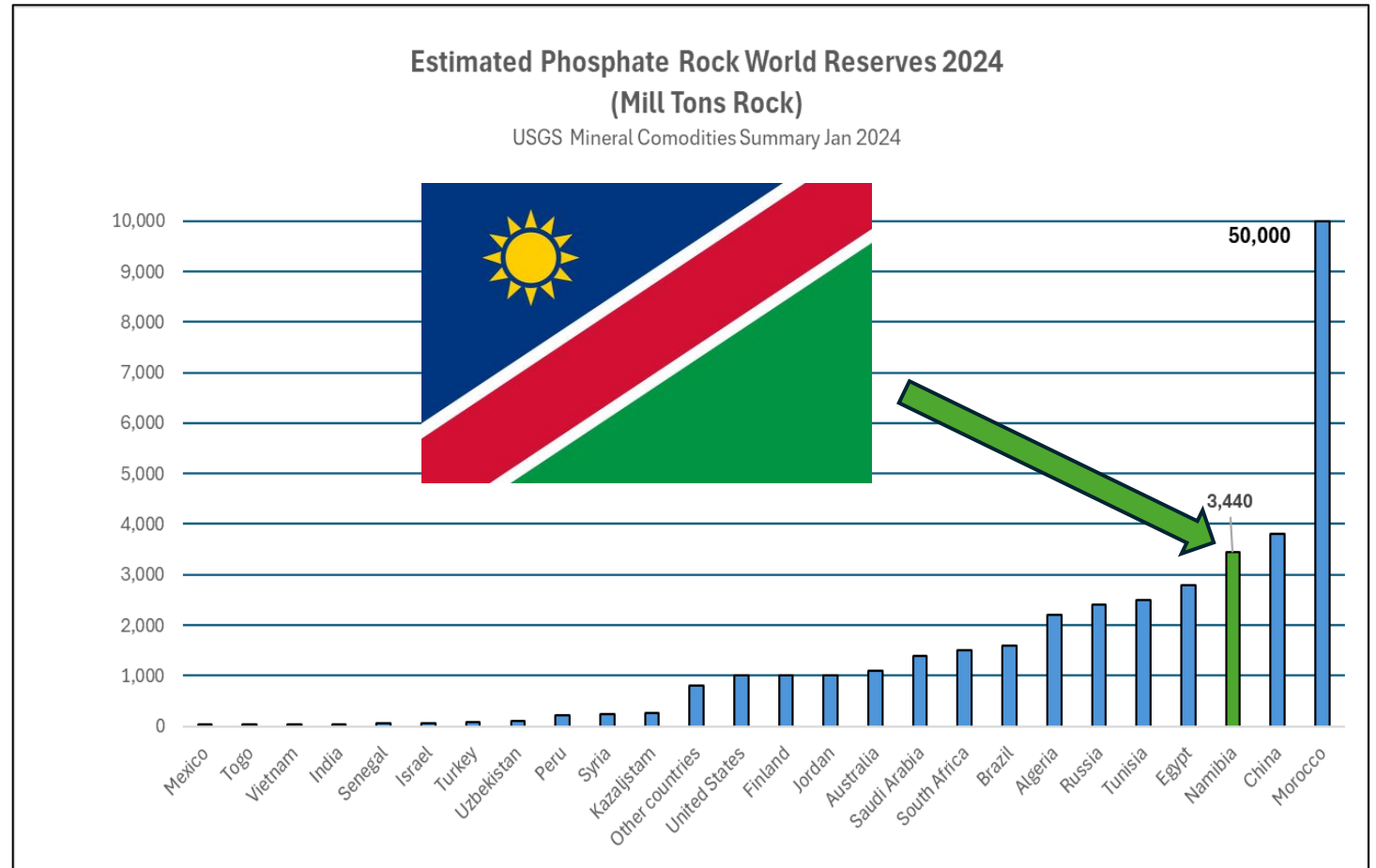
- *No synthetic replacement*
- A strategic mineral:
 - Food security (fertilisers)
 - Energy transition (batteries)
- 90% utilised in-country
- *Only 10%* is traded globally



***“Essential for life and
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Namibia's Strategic Mineral

- *One of the largest undeveloped resources in the world*
- **3.4 billion tons of Phosphate**
- **100+ year resource**



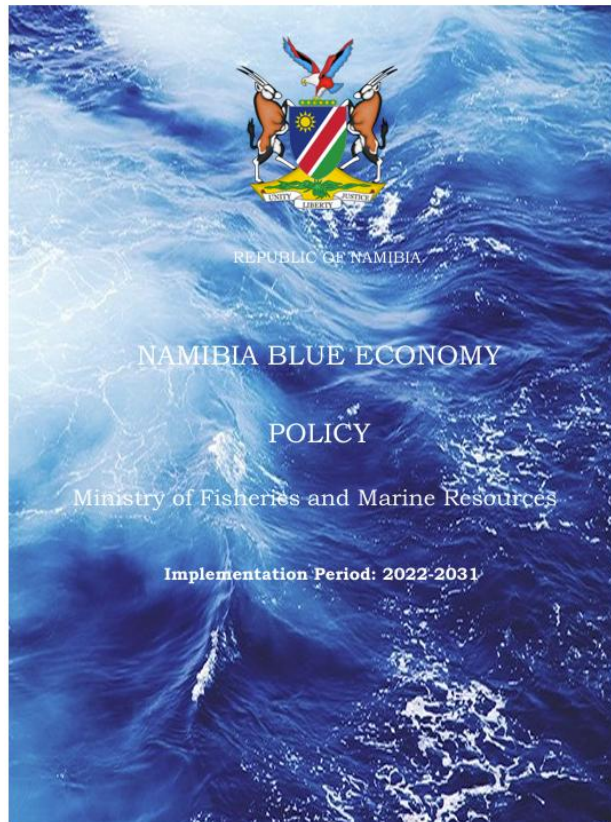
Strategic Implementation



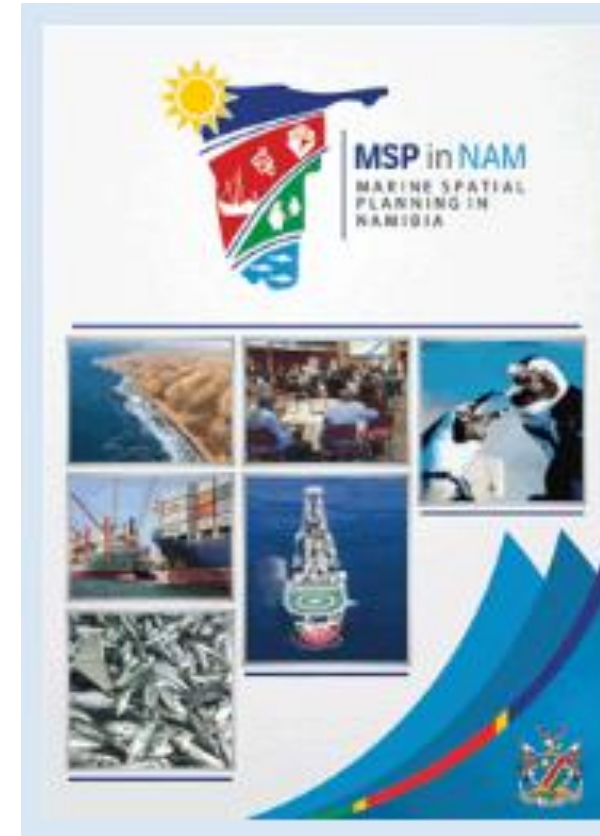
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Regulatory Approach for Co-existence

- Environmental Management Act (2007) and Minerals Act (1992):



Blue Economy Policy (BEP)



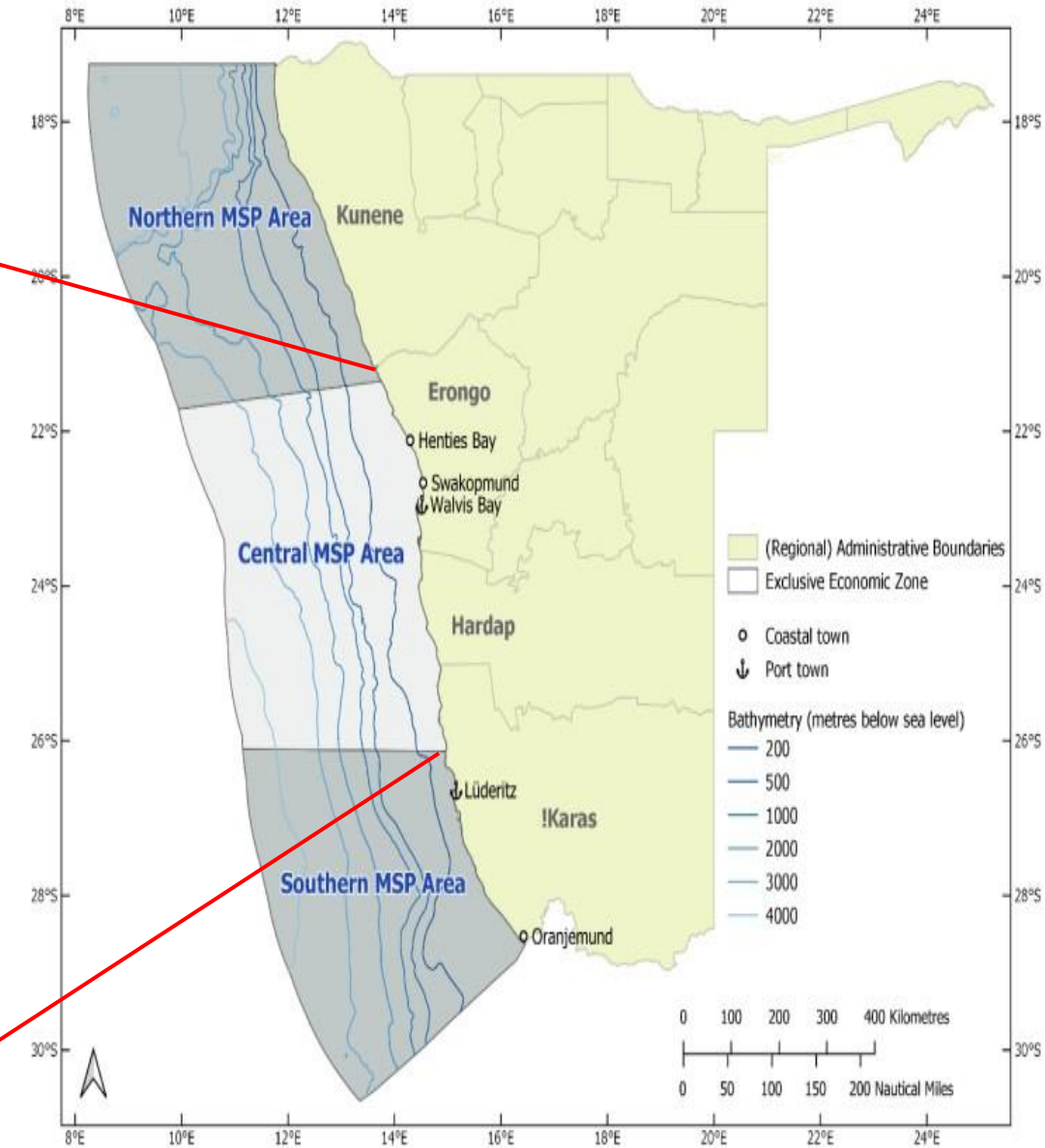
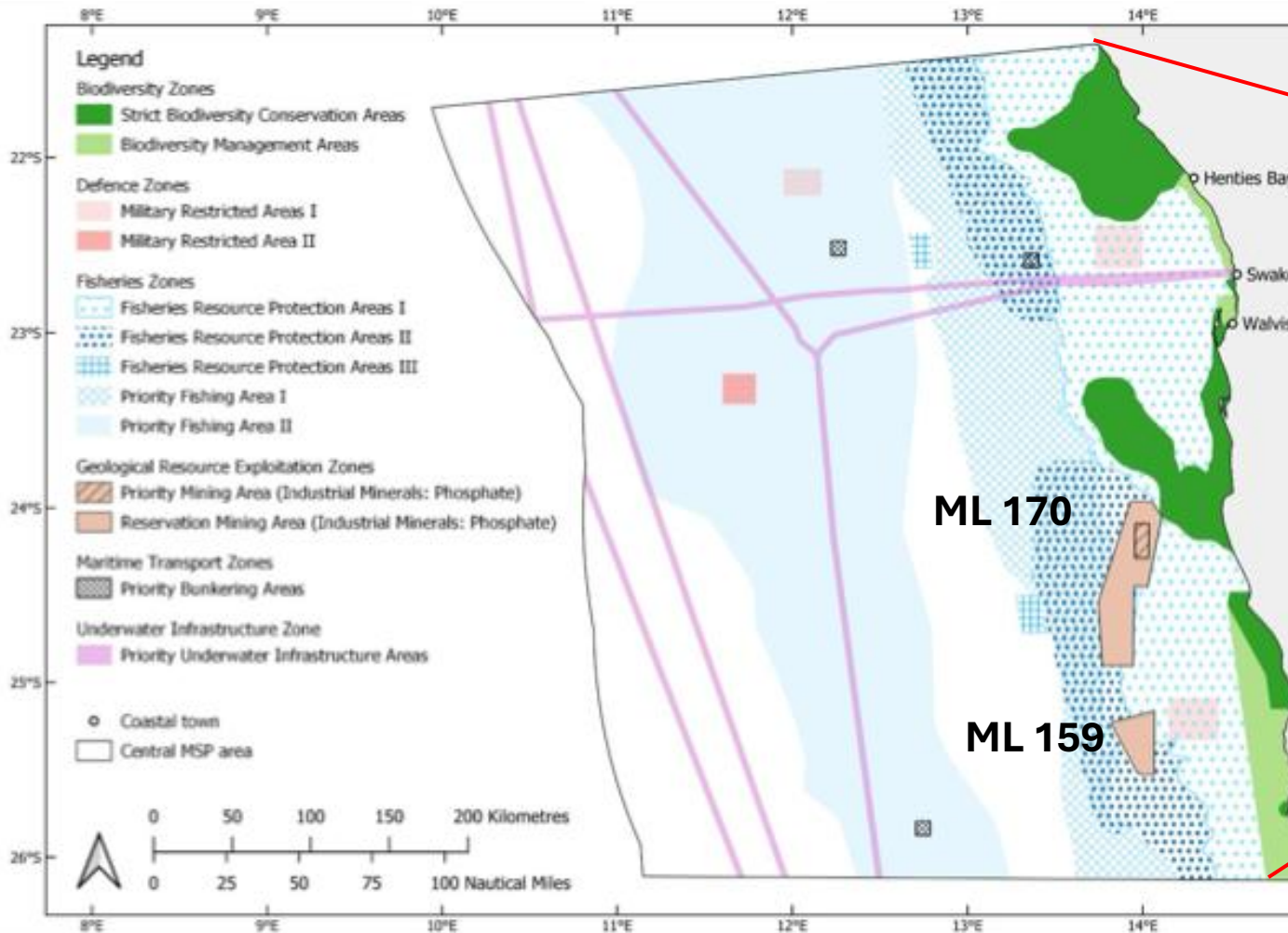
Marine Spatial Plan (MSP)

Namibia's Viable Phosphate Deposits

- Concentration $> 10\%$ P_2O_5
- Limited to few, isolated offshore mining locations within Namibia's EEZ
- Water depths 180-300m on the continental shelf

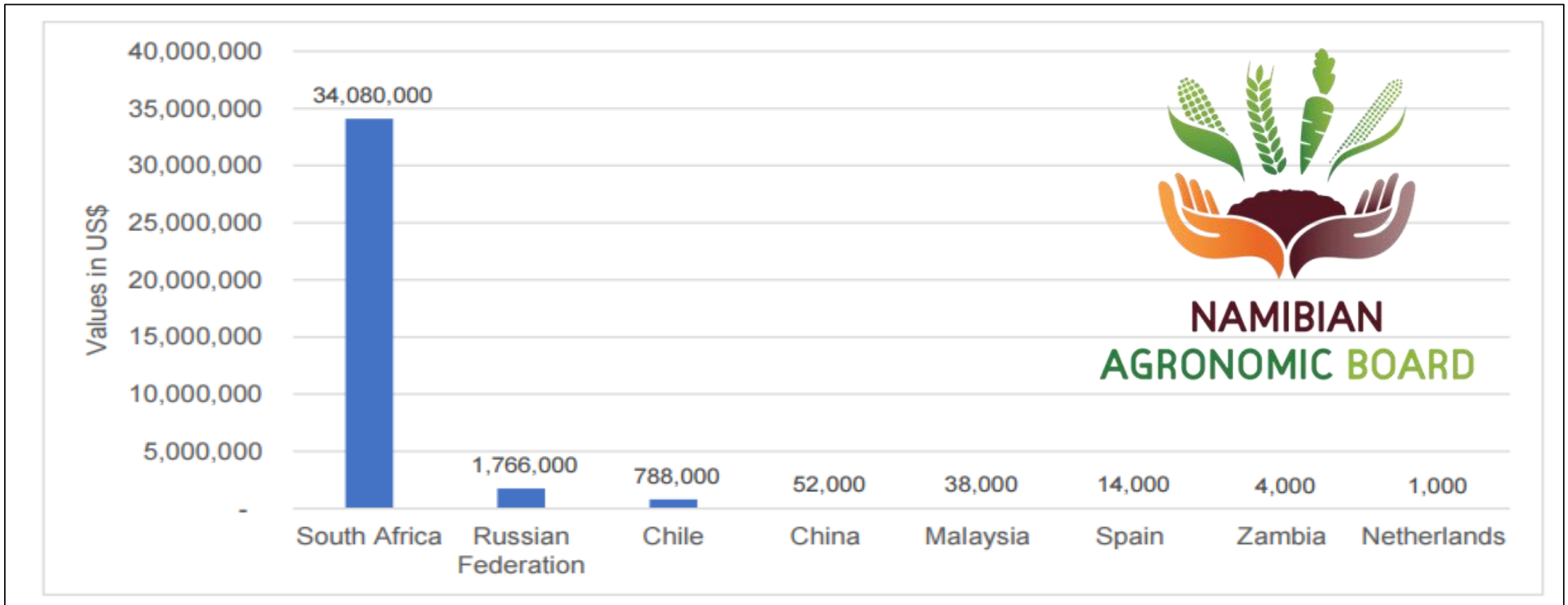


Co-existence



Namibia Fertiliser Imports

- 90%+ of Namibia's fertiliser imports come from South Africa



Namibia's Fertiliser Dependence



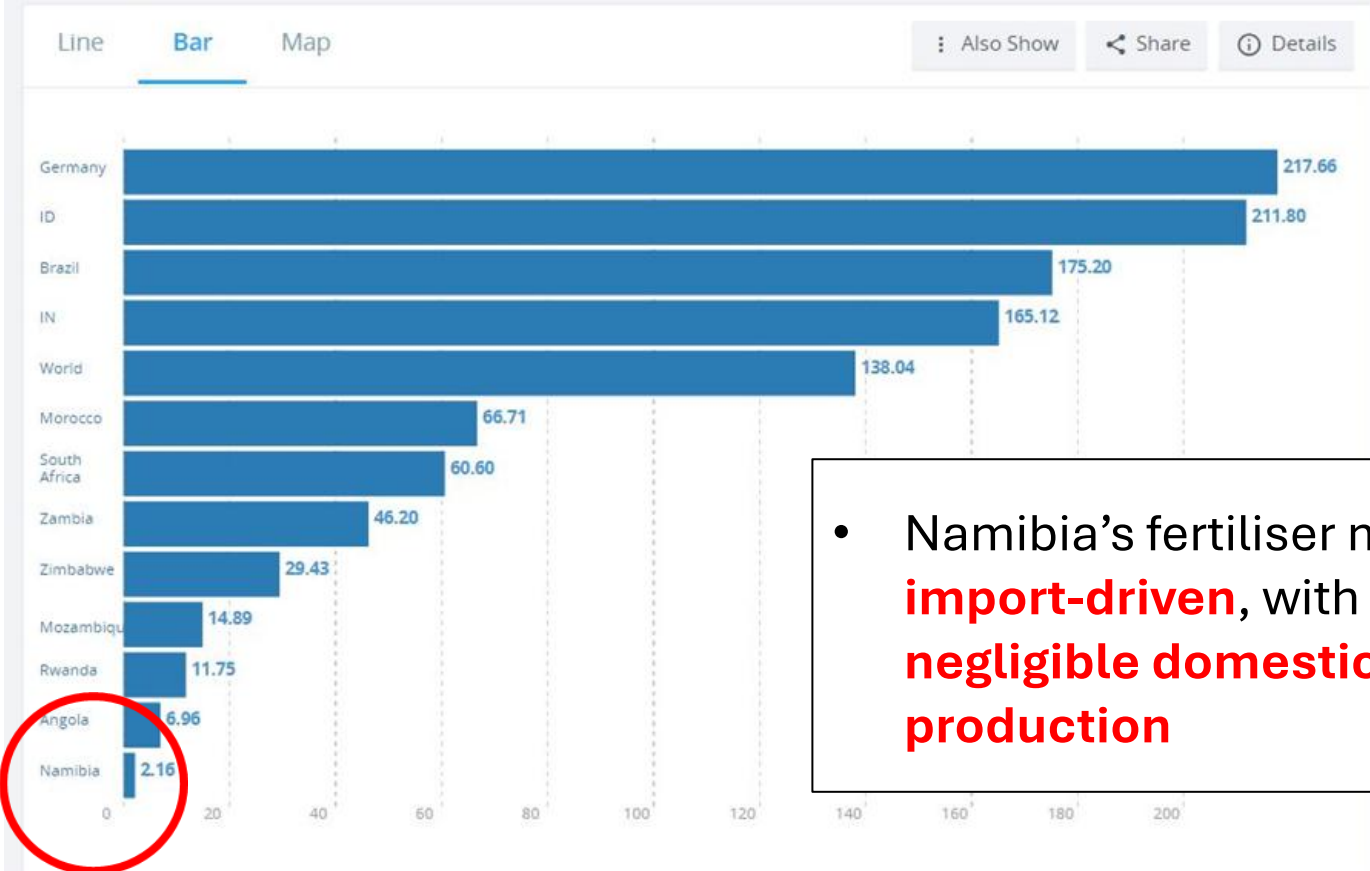
UNITED NATIONS

- 70 % of Namibia relies on agriculture
- Yet, Namibia's fertiliser utilisation is **one of the lowest** in Africa
- Fertiliser = food security

Fertilizer consumption (kilograms per hectare of arable land)

Food and Agriculture Organization, electronic files and web site.

License: [Open](#)



- Namibia's fertiliser market is **import-driven**, with **negligible domestic production**

Namibian Agronomic Board Assessment (2022)

Key Issues and Opportunities:

- Food Security
- Investment
- Local Manufacturing
- Affordability



Figure A.1. Photograph of the Soybean Plants Comparing the Effects of the P Sources Applied at 200 mg P kg⁻¹



Fertiliser Consumption vs. Production

Top 10 Fertiliser Consumers in Southern Africa (2020)

| Country | Nitrogen (N) | Phosphate (P2O5) | Potassium/Potash (K2O) | Total | % share |
|--------------------------------------|--------------|------------------|------------------------|-----------|---------|
| South Africa | 381,000 | 248,900 | 132,000 | 761,900 | 53% |
| Zambia | 191,734 | 57,818 | 53,552 | 303,103 | 21.1% |
| Zimbabwe | 50,100 | 45,800 | 36,900 | 132,800 | 9.2% |
| Malawi | 77,290 | 21,388 | 18,623 | 117,301 | 8.2% |
| Mozambique | 47,901 | 8,107 | 7,350 | 63,357 | 4.4% |
| Angola | 23,881 | 8,180 | 10,074 | 42,135 | 2.9% |
| Botswana | 9,997 | 1,672 | 1,666 | 13,336 | 0.9% |
| Namibia | 2,728 | 67 | 186 | 2,981 | 0.2% |
| Total consumption in Southern Africa | | | | 1,436,913 | 100% |

Source: FAOSTAT (2022)

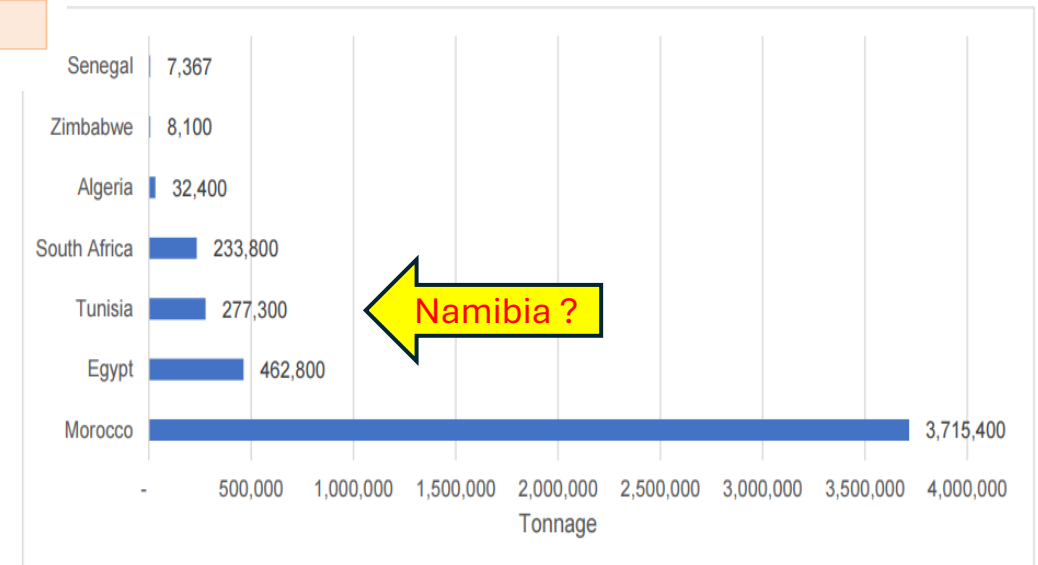


Republic of Namibia
Ministry of Agriculture, Fisheries, Water & Land Reform



Namibian Agronomic Board, Market Intelligence Report, Fertilisers , Issue 3 2022

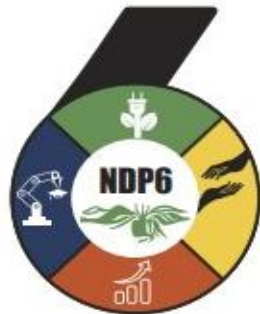
Top 10 Fertiliser Producers in Africa (2022)



Fueling Economic Diversification and Value Creation



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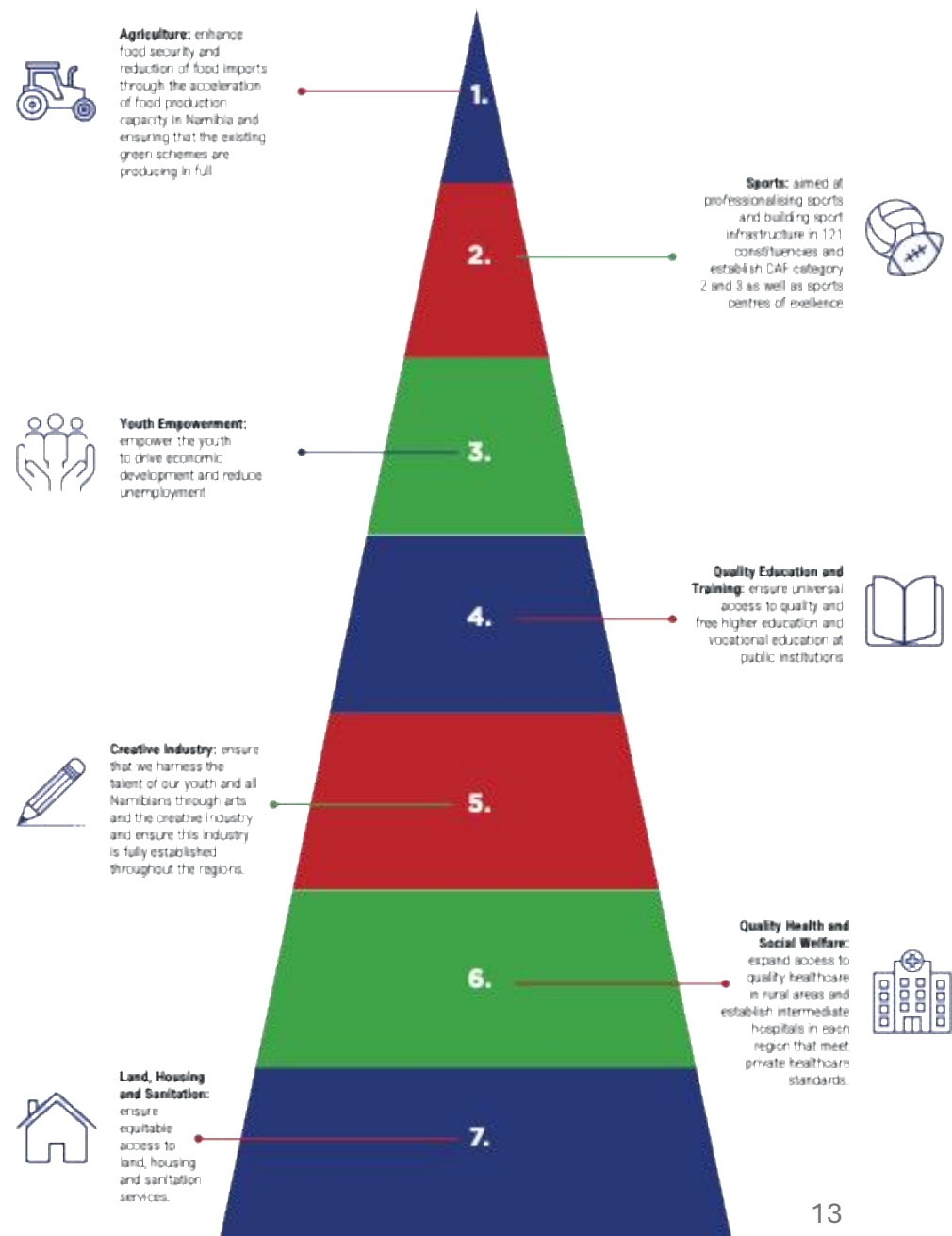
NAMIBIA'S SIXTH NATIONAL DEVELOPMENT PLAN (NDP6)

Fostering Economic Growth, Inclusiveness and Resilience for Sustainable Development

2025/26 to 2029/30

*“Accelerate the implementation of Namibia's Mineral Beneficiation Strategy and local content policy frameworks for **all mineral and natural resources**, as part of a broader strategy to **develop emerging industries**, and **establish new sectors**, through **value addition**.”*

TOP 7 PRIORITY LIST:



Phosphate Concentrate: +/- 28% P_2O_5



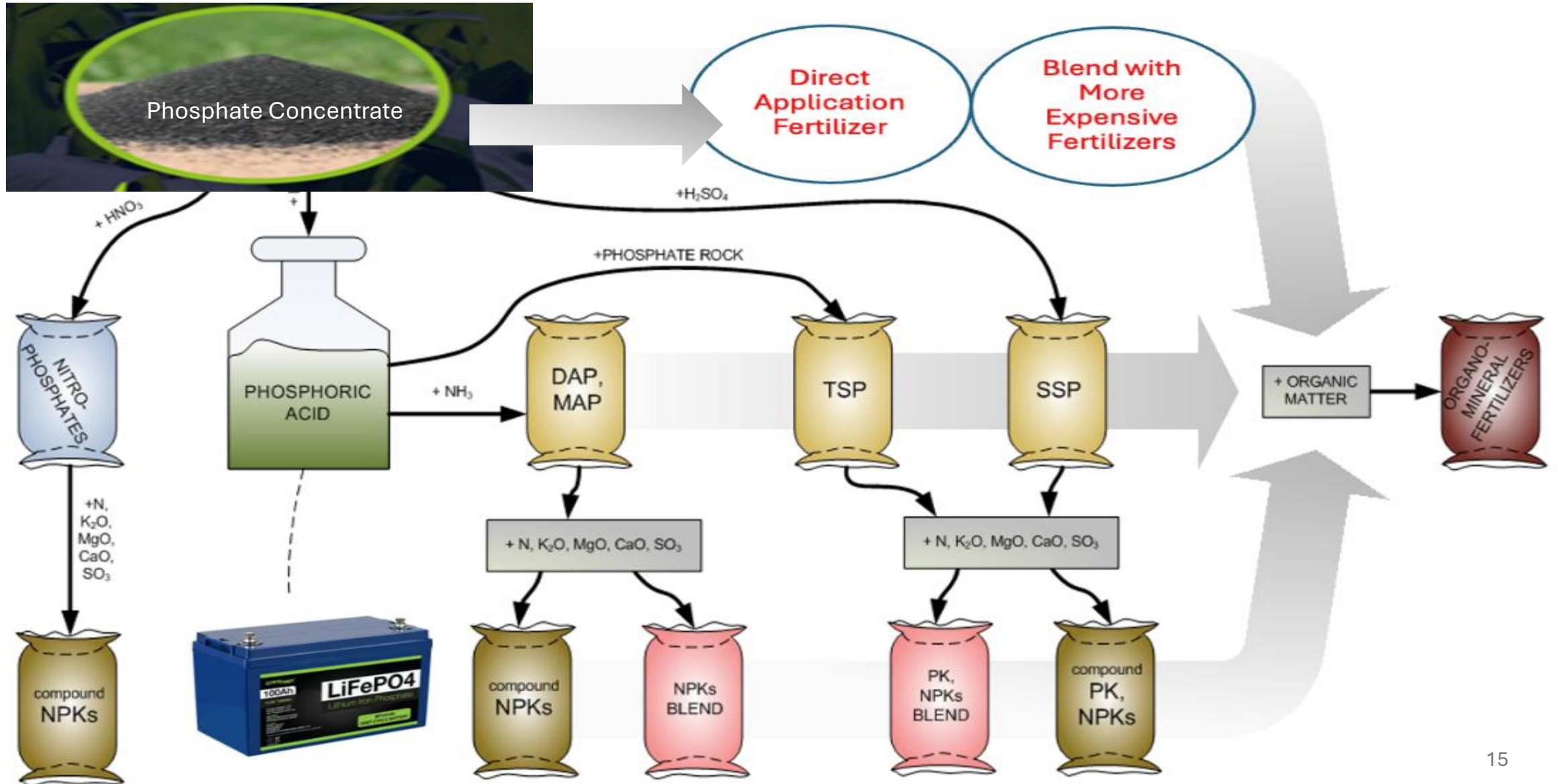
Final Product:

- ❖ Certified as a Direct Application Fertiliser – Value Added Product.
- ❖ Feedstock for blending or further manufacturing of fertiliser and feed products

By-product:

- ❖ Coarse Waste (shell)
- ❖ Calcium by-product possibly used for road base, lime or cement

Value Addition Products



Fertiliser Products

- ✓ Direct Application Phosphate (DAP)
- ✓ Single Super Phosphate (SSP)
- ✓ Dicalcium Phosphate (DCP)
- ✓ Phosphoric Acid
 - Triple Super Phosphate (TSP)
 - Mono Ammonium Phosphate (MAP)
 - Diammonium Phosphate (DAP)
- ✓ Gypsum By-product





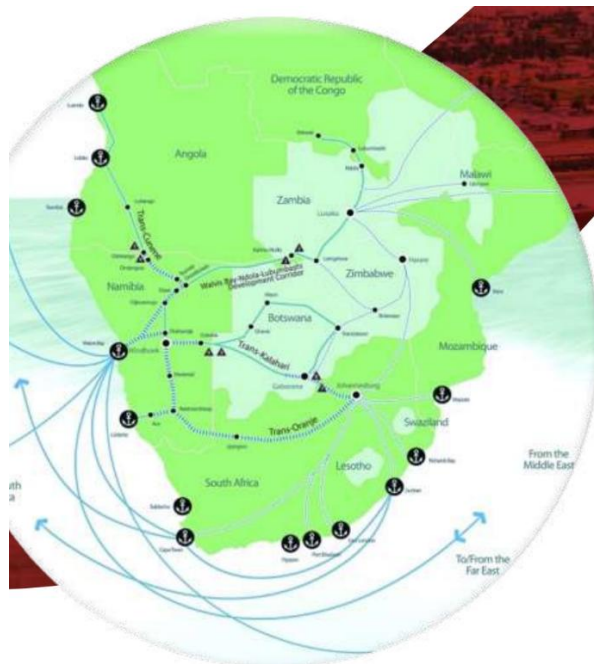
WALVIS BAY
CORRIDOR
GROUP



Industry Development and International Trade

- Namport Expansion

- Port of Walvis Bay
- Port of Lüderitz

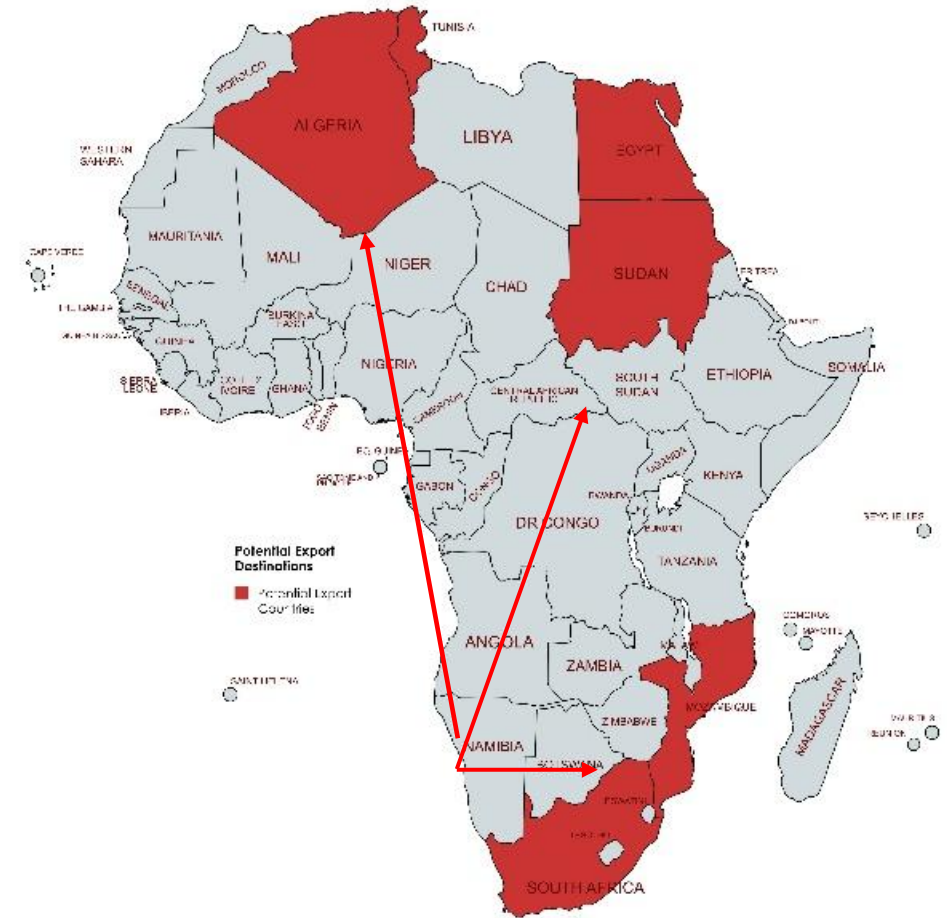


- Walvis Bay Corridor Group

- Rail
- Road
- Sea

African Export Market Potential

- Support African Free Trade
- African Importers:
 - South Africa
 - Tunisia
 - Mozambique
 - Sudan
 - Côte d'Ivoire
- Proximity means **lower shipping costs**



Namibia Export Market Potential and Geographic Advantage

- India
- Malaysia
- Philippines
- United States
- Brazil
- Indonesia
- Europe
- Turkey
- Mexico
- South Korea
- New Zealand



Jordanian Phosphate Success Story



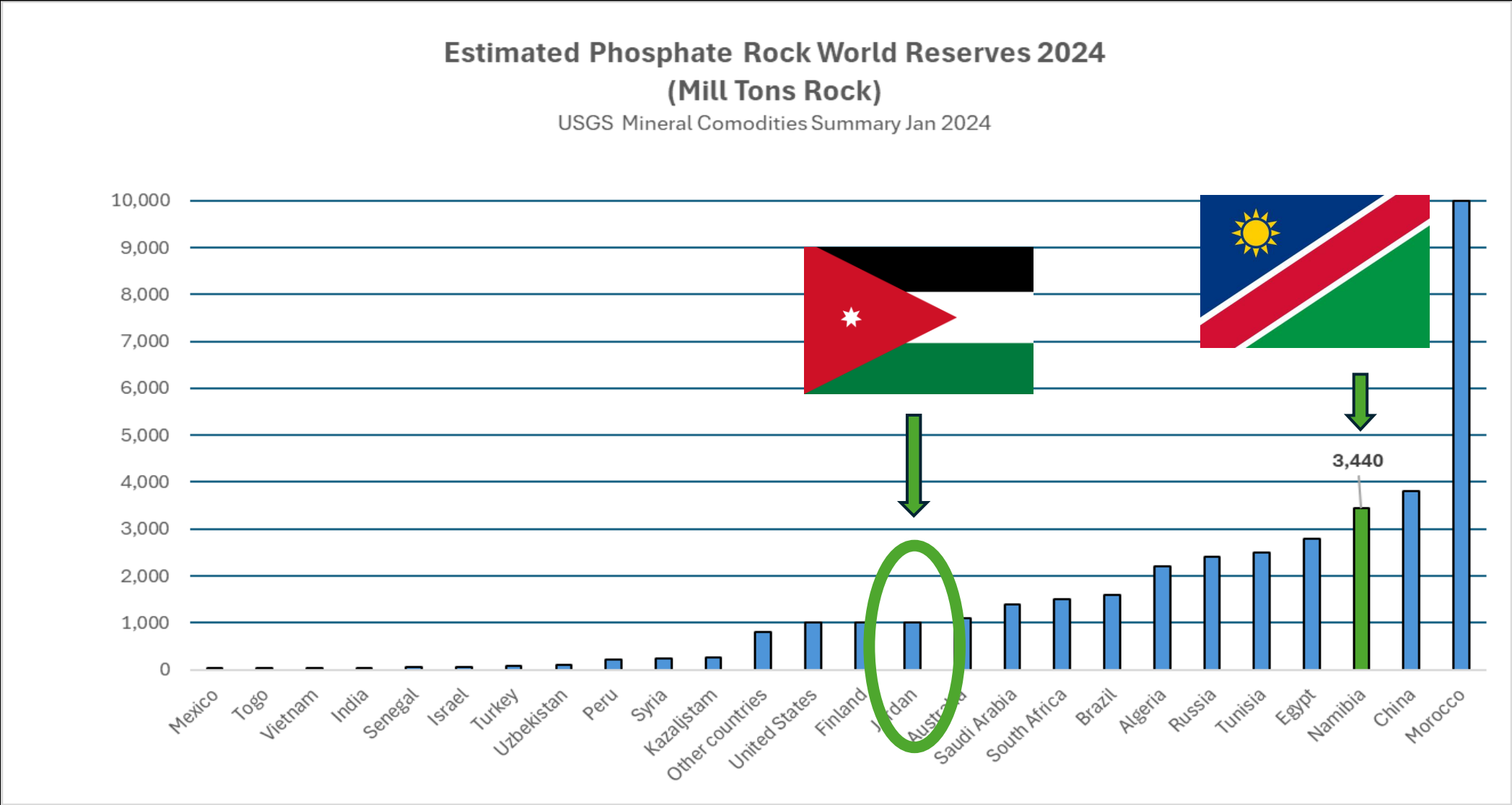
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P

Phosphorus

***“Is essential for life
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Namibia's Phosphate Industry Potential





Jordan's Phosphate Industry: *a Strategic Economic Pillar*

Globally important, vertically integrated industry

- Mining, processing, and fertiliser production
- **Global Presence**
 - Export goal: *3 million tonnes per year*
- **Economic Importance**
 - Major contributor to national income
 - Upskills local workforce
- **Strategic Development**
 - Continuous capital investment
 - Emphasis on sustainability, operational efficiency, and economic diversification

| | |
|---|--|
| Phosphate Reserves | 3.7 billion tonnes (t) |
| Annual Production Capacity | > 7 million t/year |
| 2024 Net Profit | 652 million USD |
| Employees | ~2,290 direct |
| Broader Mining Employment | 10,000 extraction 191,000 manufacturing |
| Total Employment (Direct and Indirect) | +200,000 jobs |
| Export Volumes | 20+ million t to Asian and MENA markets |

Socio-Economic Potential for Namibia



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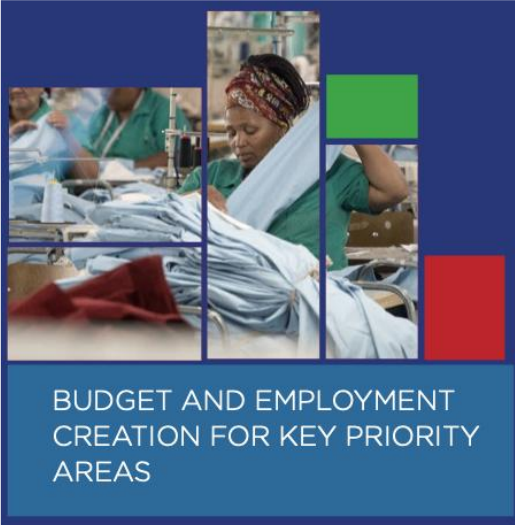
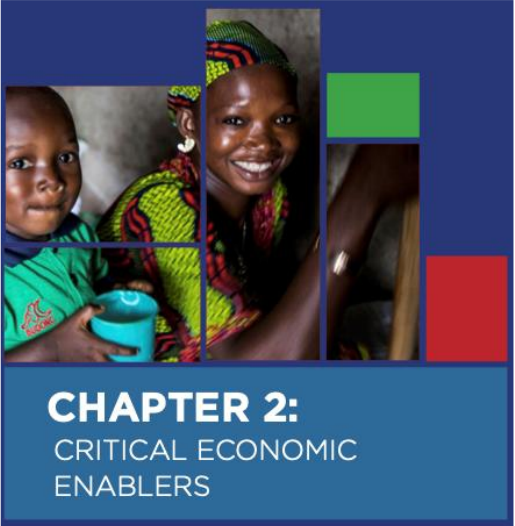
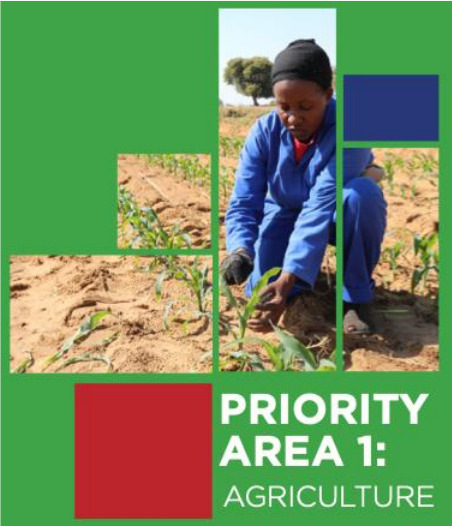
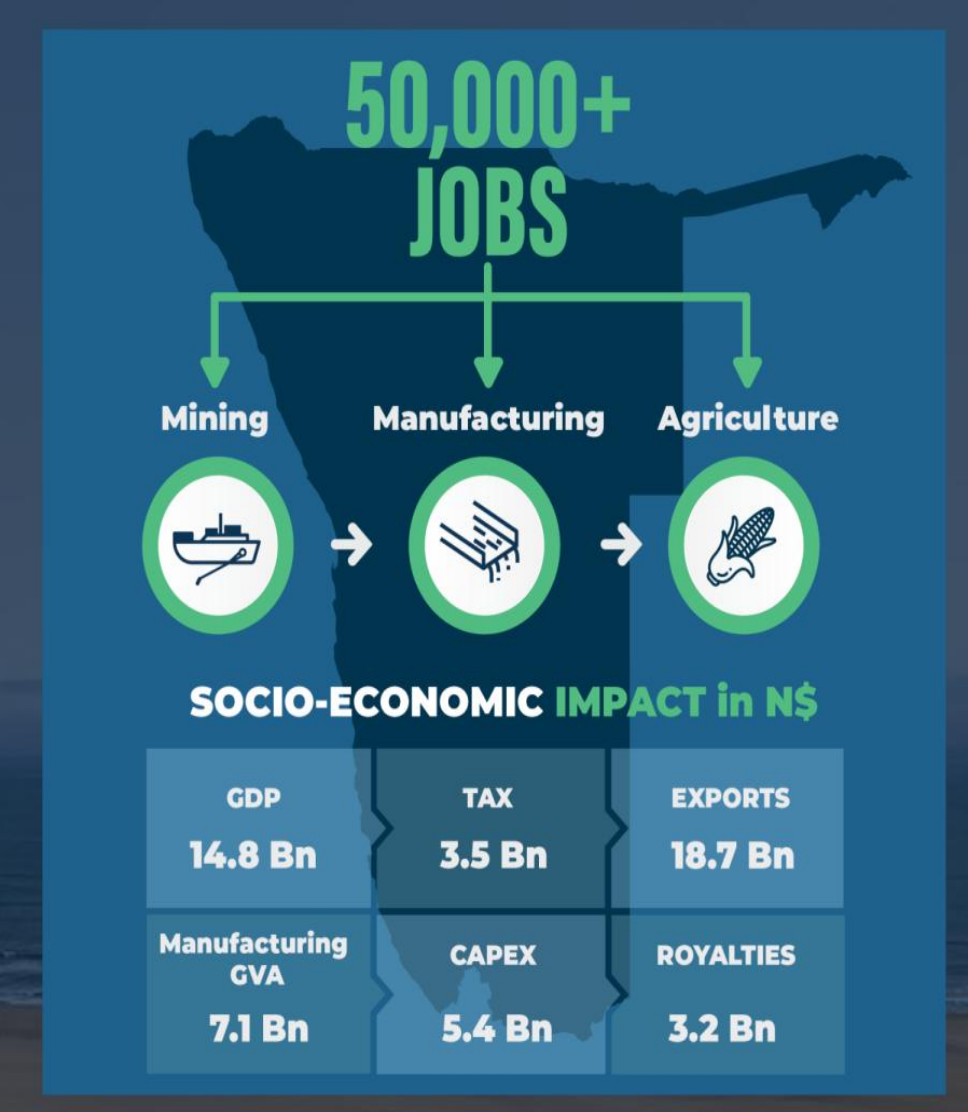
Socio-Economic Potential



- *Economic Assessment of the Development of a Phosphate Based Industry in Namibia (2018)*
- Potential national socio-economic benefits based on the extraction of marine phosphate deposits on the Namibian Continental Shelf



Socio-Economic Benefits: *Integrated Phosphate Industry*

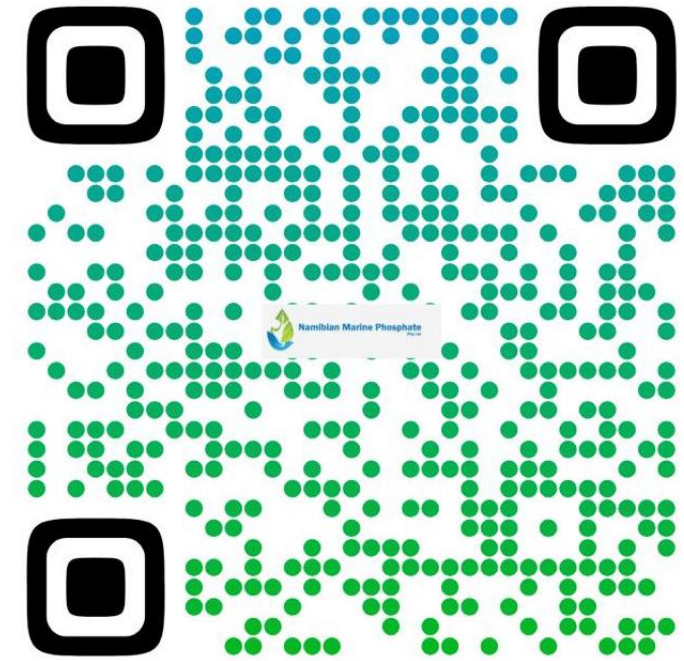


The Key to Unlocking Namibia's Phosphate Industry

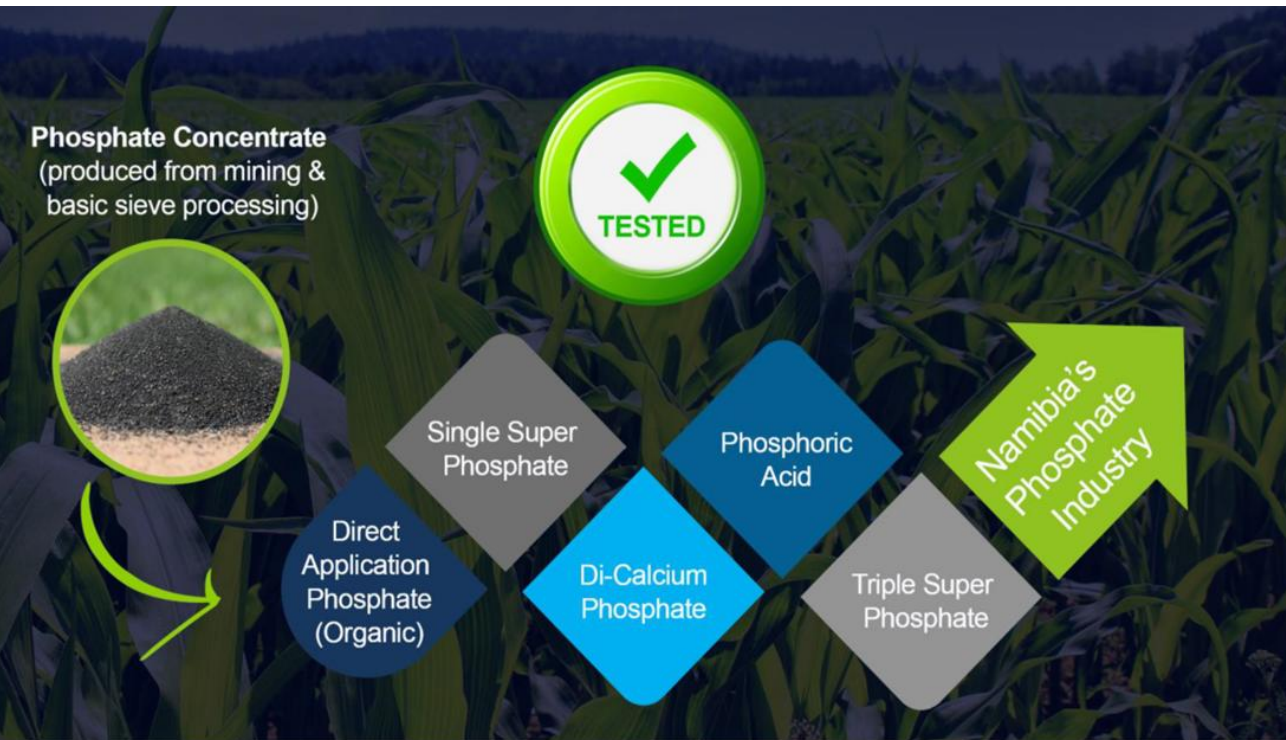
- ✓ **Record of Decision** on the Sandpiper Marine Phosphate Project's **Environmental Clearance Certificate** (ML 170)
- ✓ Which will address misconceptions & remove barriers, unlocking the way forward for the development of this new industry!



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THANK YOU!



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