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# INSETPRYSMONITERINGS VERSLAG INPUT PRICE MONITORING REPORT

Augustus / August 2025

Maandeliks Hersien / Revised Monthly



## In die Verslag... In this Report...

### Kunsmis/ Fertilizer

**Global fertilizer markets remain volatile as geopolitical tensions and tender activity drive sentiment.**

India's **urea** tender at \$535/t CFR secured full volumes and lifted global benchmarks. Middle East prices rose to \$510/t FOB, while China's FOB jumped \$50/t after export policy changes.

**Phosphate** markets expected to stay elevated. India's DAP price dipped slightly, first decline since Nov'24. Brazil's MAP fell \$5/t.

**Potash** prices held steady. SE Asia saw an increase of \$7/t. Brazil remains in the low \$360s/t CFR, with sellers more flexible due to high stocks.

### Diesel

The wholesale diesel price has been on an upward trend recently, now at **R20 per litre**, there is, however, an anticipated decrease of 33 **cents per litre**. This downward movement comes partially from decreased international prices of Brent crude oil.

### Chemikalieë/ Chemicals

**Insecticide prices** inclined slightly by 1.05% on average month-on-month, with most active ingredients showing marginal increases.

**Fungicides** also saw a decline in average month-on-month prices of 1.66%. Led by a 4.77% fall in Trifloxystrobin prices.

**Herbicide prices** increased with 1.66% month-on-month, with Glyphosate taking the lead by increasing with 6.93%.

On a **year-on-year basis**, chemical prices remain significantly lower across the board with fungicides down 20.44%, herbicides down 18.67%, and insecticides down 0.82%.



## Plaaslike Kunsmispryse (Rand Waarde)

### Local Fertiliser Prices (Rand Terms)

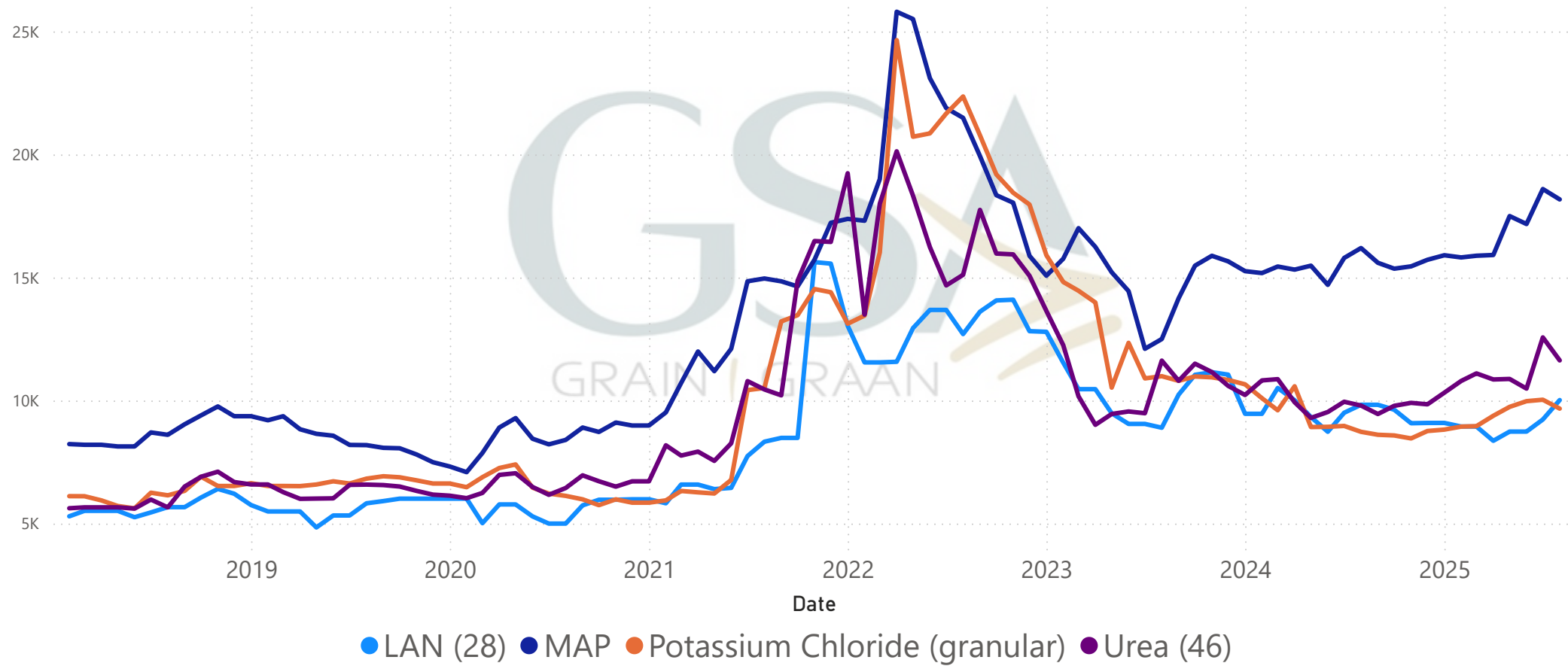
Kunsmis Naam/ Fertilizer Name	Current Ave Fert Price	Prev Month Average Price	M-M	Prev Year Average Price	Year on Year % Change
MAP	18 171,00	18 593,00	-2,27%	16 195,00	12,20%
LAN (28)	10 016,00	9 226,00	8,56%	9 824,00	1,95%
Urea (46)	11 628,50	12 563,00	-7,44%	9 793,00	18,74%
Potassium Chloride (granular)	9 669,00	10 030,00	-3,60%	8 726,00	10,81%

Increase in Price  
 Decrease in Price

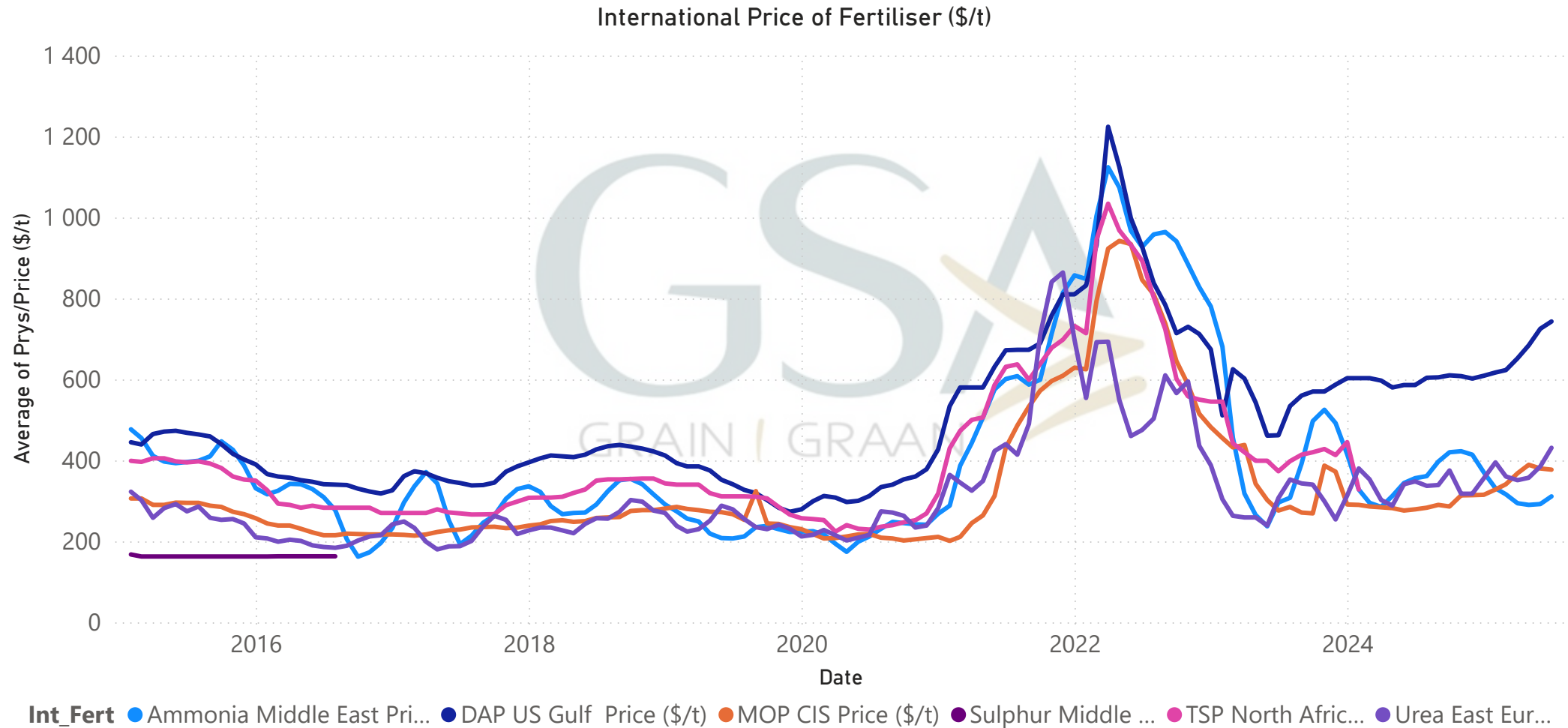


## Plaaslike Kunsmispryse (Rand Waarde) Local Fertiliser Prices (Rand Terms)

Average Local Fertiliser Price (R/t)



## Internasionale Kunsmispryse (Rand Waarde) International Fertiliser Prices (Rand Terms)



## Internasionale Kunsmispryse (Dollar Waarde) International Fertiliser Prices (Dollar Terms)

Kunsmis Naam/ Fertiliser Name	Current Average Price	Previous Month Average Price	Month on Month % Change	Previous Year Average Price	Year on Year % Change
MOP CIS Price (\$/t)	377	380,00	-0,80%	279,00	25,99%
DAP US Gulf Price (\$/t)	743	725,00	2,42%	586,00	21,13%
Urea East Europe Price (\$/t)	431	385,00	10,67%	348,00	19,26%
Ammonia Middle East Price (\$/t)	311	292,00	6,11%	356,00	-14,47%

	Increase in Price
	Decrease in Price



## Highlights in the Fertiliser Market



### Nitrogen

#### Urea:

- India surprises with high tender price of \$535/t CFR, securing full 2 million tons volume; an extra 600 000t offered at same price may influence future pricing.
- China reverses export stance, allowing shipments to India; FOB price jumps to \$50/t, still the cheapest origin.
- US prices fall due to slow seasonal demand and high stocks; expected to rebound as global trends tighten.
- Iran targets \$430/t FOB, achieves \$423/t; may gain market share due to lower pricing vs Middle East.

#### Other Nitrogens:

- Ammonium Sulphate (Amsul): Prices falling despite urea gains; Brazil flooded with stock, biggest discount vs urea in 3+ years.
- Ammonium Nitrate (AN): EU producers offering discounts and Brazil imports are up.
- Ammonia: Middle East prices up \$15/t to mid-\$330s FOB due to outages in Egypt/Algeria



### Phosphates

- India's DAP price dips slightly by a few dollars to just over \$800/t CFR - first decline since Nov'24.
- Brazil MAP benchmark drops \$5/t, nearing \$750/t CFR; affordability remains a challenge despite underlying demand.



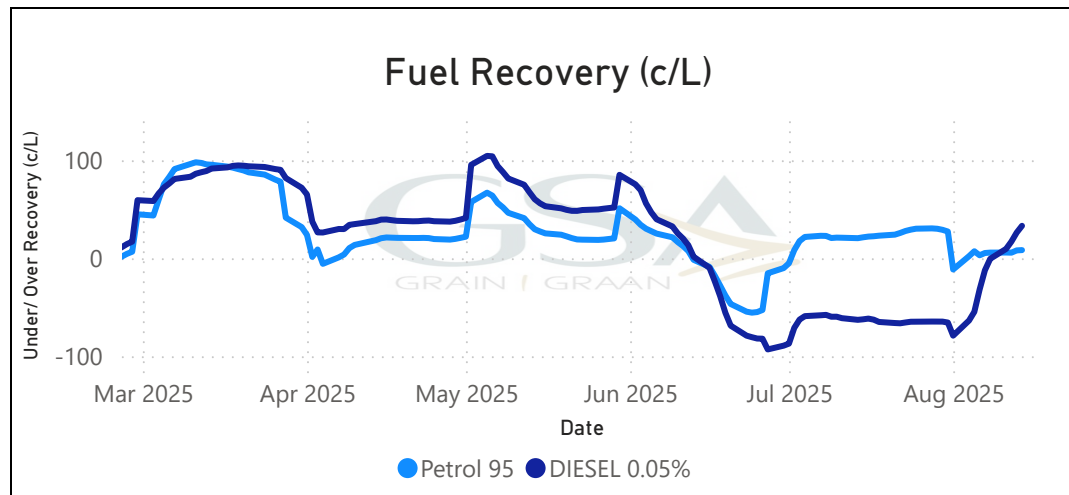
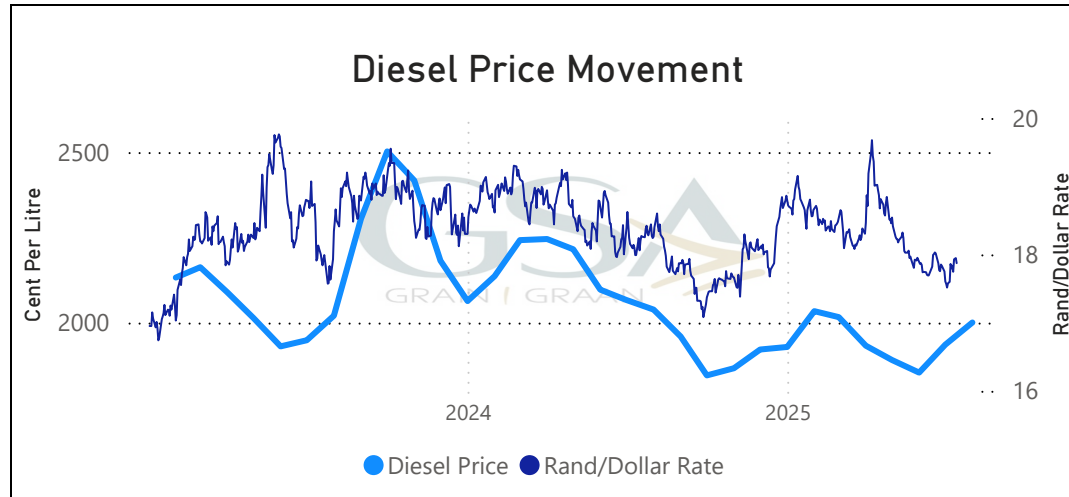
### Potash

- Global prices mostly stable, but momentum slowing after previous run-up.
- South East Asia sees a \$7/t increase, pushing prices into the \$370/s/t CFR; recent tenders suggest further price testing ahead.
- Brazilian benchmark stable in the low \$360s/t CFR, but sellers are showing greater price flexibility due to high stock levels and end of soya season.
- Bangladesh closes 250 000t tender, with lowest offer at \$385/t CFR.



# MAANDELIKSE GROOTHANDEL BRANDSTOF PRYS

## MONTHLY WHOLESALE FUEL PRICE



Current  
Wholesale Diesel Price (R/L)

**20,0035**

Expected Price Change (c/L) as on  
14 August

**-33,05**

The wholesale diesel price is currently sitting at **R20,0035/litre**, with an expected decrease of 33,05 **cents per litre** on 03 September.

Brent crude prices decreased from 15 July 2025 to 15 August 2025, driven by international decrease in demand, mainly due to the tariffs implemented by President Trump. Oil prices experience downward pressure due to OPEC+ increasing production. Therefore, the gap between supply and demand continues to grow.

The bottom graph tracks the under- or over-recovery for both Petrol 95 and Diesel 0.05%. Over-recovery (above the zero line) suggests a potential price decrease. In the past few days leading up to 03 September 2025, diesel shows consistent over-recovery, supporting the expected price cut of 33,05 cents per litre.





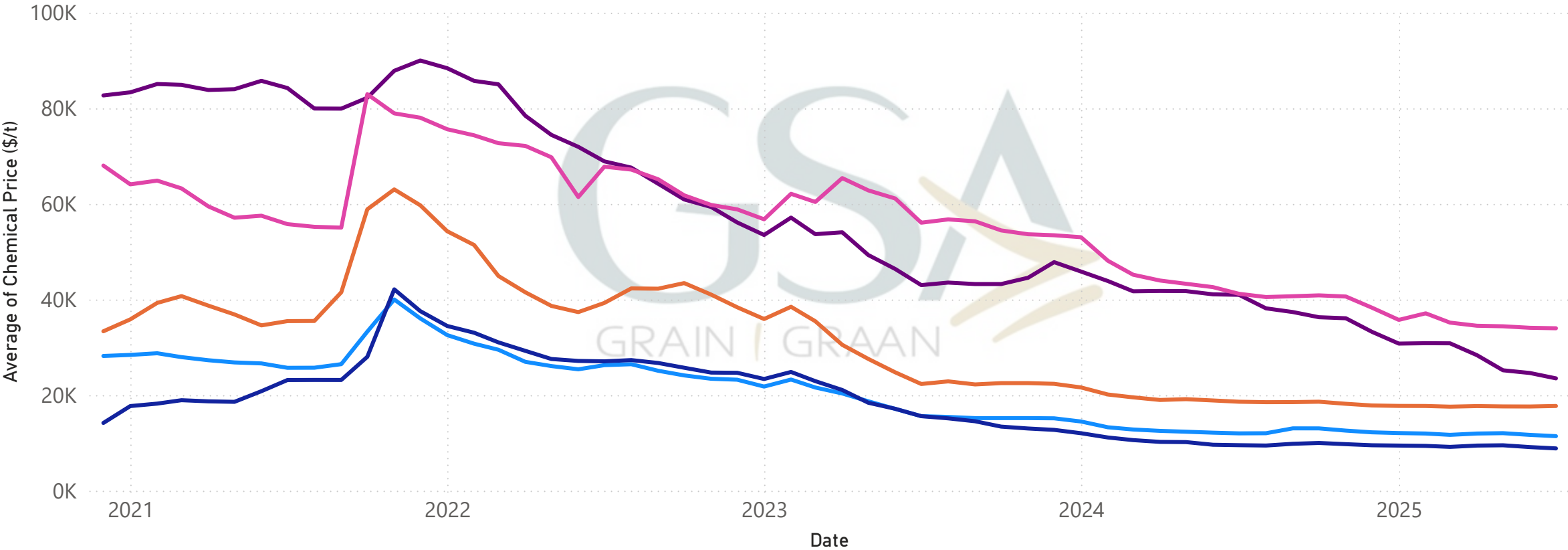
## Chemikalieë Pryse/ Chemical Prices

Chemical Type	Current Month Ave Price	Previous Month Ave Price	Month on Month % Change	Previous Year Ave Price	Year on Year % Change
<b>Fungicide</b>	<b>16 977,76</b>	<b>17 259,15</b>	<b>-1,66%</b>	<b>21 340,40</b>	<b>-20,44%</b>
95% Difenconazole technical	11 414,35	11 680,27	-2,33%	11 998,12	-4,87%
95% Propiconazole technical	8 849,32	9 127,21	-3,14%	9 526,40	-7,11%
96% Azoxystrobin technical	17 724,30	17 616,15	0,61%	18 615,11	-4,79%
96% Trifloxystrobin technical	23 505,13	24 626,91	-4,77%	40 978,80	-42,64%
97% Epoxiconazole technical	33 986,53	34 083,42	-0,29%	41 195,25	-17,50%
97% Tebuconazole technical	6 386,90	6 420,96	-0,53%	5 728,72	11,49%
<b>Herbicide</b>	<b>3 204,25</b>	<b>3 151,06</b>	<b>1,66%</b>	<b>3 939,73</b>	<b>-18,67%</b>
92% Acetochlor technical	2 667,62	2 693,48	-0,97%	3 308,49	-19,37%
95% Glyphosate technical	3 550,76	3 304,62	6,93%	3 550,13	0,02%
95% Trifluralin technical	3 587,63	3 570,90	0,47%	4 718,77	-23,97%
97% Atrazine technical	3 191,75	3 176,87	0,47%	3 601,17	-11,37%
97% Metolachlor technical	3 023,50	3 009,41	0,47%	4 520,09	-33,11%
<b>Insecticide</b>	<b>16 624,10</b>	<b>16 449,01</b>	<b>1,05%</b>	<b>16 761,72</b>	<b>-0,82%</b>
94% Cypermethrin technical	9 278,34	9 111,96	1,79%	7 947,40	16,75%
95% Acetamiprid technical	8 285,02	8 297,46	-0,15%	8 856,98	-6,46%
95% Lambda-cyhalothrin technical	13 237,10	13 175,40	0,47%	13 287,06	-0,38%
97% Imidacloprid technical	8 490,22	8 552,77	-0,74%	9 796,75	-13,34%
98% Carbofuran technical	12 825,11	12 765,33	0,47%	12 873,52	-0,38%
98% Deltamethrin technical	47 628,81	46 791,13	1,76%	47 808,60	-0,38%
<b>Total</b>	<b>12 801,91</b>	<b>12 823,78</b>	<b>-0,17%</b>	<b>14 606,55</b>	<b>-12,36%</b>



Swamdoders  
Fungicides

Price Movements of Fungicides

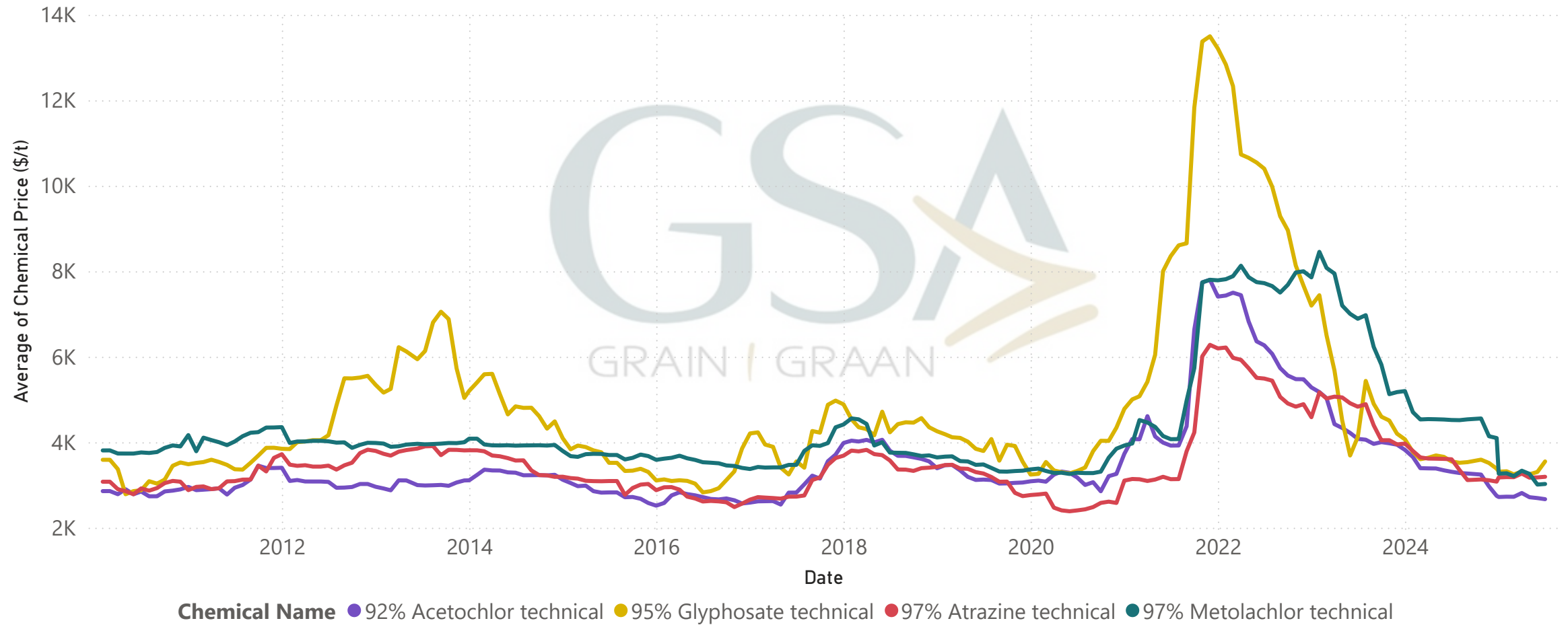


**Chemical Name** ● 95% Difenoconazole technical ● 95% Propiconazole technical ● 96% Azoxystrobin technical ● 96% Trifloxystrobin technical ● 97% Epoxiconazole technical



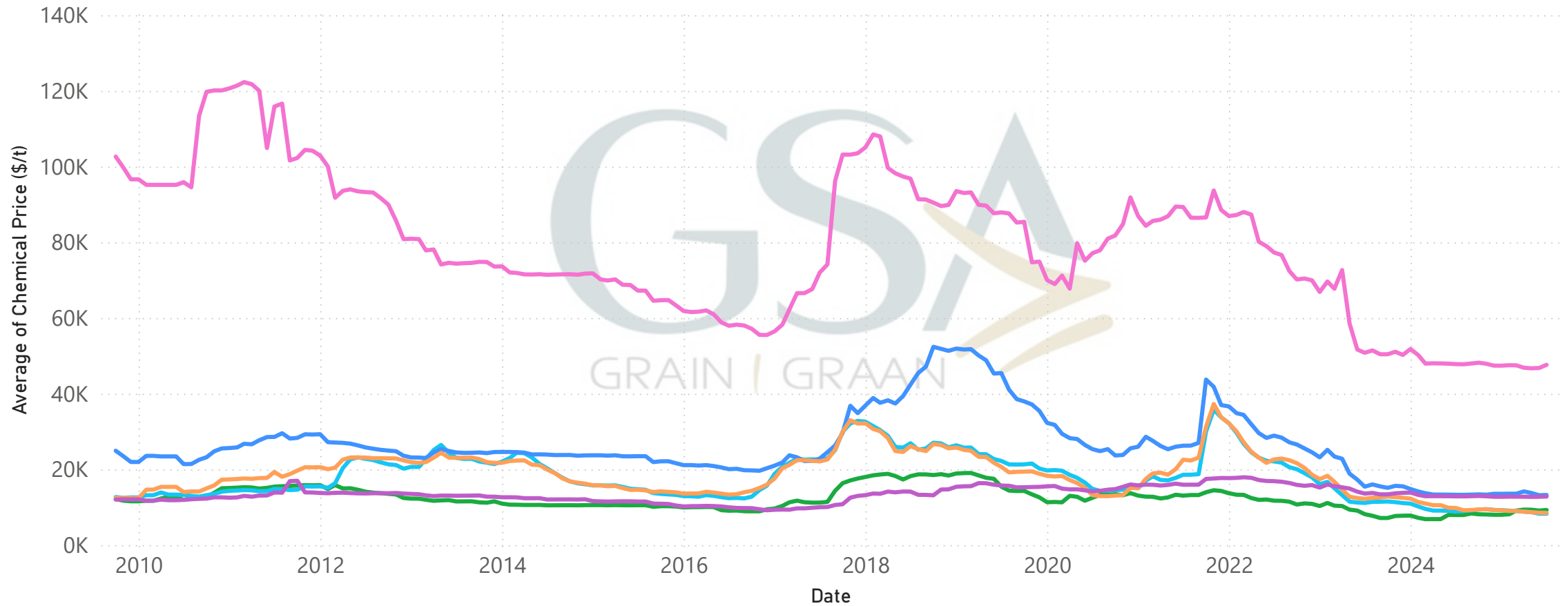
# Onkruidodors Herbicides

Price Movements of Herbicides



# Onkruiddoders Herbicides

## Price Movements of Insecticides



**Chemical Name** ● 94% Cypermethri... ● 95% Acetami... ● 95% Lambda... ● 97% Imidacl... ● 98% Carb... ● 98% Delt...



**DANKIE!**

**THANK YOU!**

**Vir enige navrae / for any queries:**

**Grain SA**

**Marguerite@grainsa.co.za/ Strelza@grainsa.co.za**

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