The Phosphate Pivot:

Why Morocco and Tunisia Matter to U.S. Food Security

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In December 2025, Beijing halted phosphate exports until August 2026. This coincided with Washington's official classification of phosphate as a critical mineral for the first time. The connection is not a coincidence. Although the American response has been driven largely by domestic concerns, it has significant implications for its partnerships in the Maghreb.

In March 2025, phosphate exports from China - the world's largest fertilizer processor - collapsed from 950,000 tons to just 13,000 tons in a single month. By December, Beijing had formalized the halt until August 2026. Prices for diammonium phosphate (the most common type of phosphate-based fertilizer) surged 28% in one year. American farmers preparing for spring planting faced tightening supply and no reliable alternative on the horizon. The United States had just discovered that its food sovereignty rests at the whim of its rival.

The shock was not unforeseeable. China had been restricting phosphate exports since 2021, methodically prioritizing domestic supply under the explicit rationale of national food security. What changed in late 2025 was the scale and formalization of the suspension, orchestrated by the National Development and Reform Commission, China's powerful state planner, and enforced through industry associations acting as quasi-regulatory bodies.

Washington's response came swiftly, if belatedly. On November 7, 2025, the U.S. Geological Survey published the Final 2025 List of Critical Minerals, adding phosphate - alongside uranium and metallurgical coal - to a list of 60 minerals deemed essential to national economic and security interests. The designation followed years of advocacy from agricultural organizations, a bipartisan group of lawmakers, and the Departments of Energy, Defense, and Agriculture. The message was unmistakable: phosphate is no longer a commodity. It is strategic infrastructure.

But designating phosphate as critical does not solve the problem. It names it. The deeper question - one that domestic policy alone cannot answer - is where the United States and its allies will reliably source phosphate when the largest exporter has made clear it will always put its own strategic interests first. The Chinese export suspension should be understood not as a temporary market disruption but as an early warning signal. As strategic competition intensifies, fertilizer supply chains may become as vulnerable to geopolitical leverage as energy supply chains were in previous decades.

The answer does not lie in replacing one dependency with another. It lies in building a diversified network of reliable suppliers, redundant production capacity, and politically aligned industrial partnerships. Within that broader strategy, the Maghreb deserves far more attention than it currently receives.

Why Not a Domestic Solution?

The most intuitive response to supply chain vulnerability is self-sufficiency. The United States does possess phosphate deposits, notably in Florida, Idaho, and North Carolina. But domestic production has been in structural decline for decades, constrained by environmental regulations, aging infrastructure, and the deteriorating quality of remaining reserves. American reserves represent a fraction of Morocco's alone, and extraction costs are rising. The gap between domestic supply and agricultural demand cannot be closed without imports, regardless of how aggressively the critical mineral designation is exploited.

The alternatives among close allies are no more reassuring. Canada, Australia, and the European Union each hold limited phosphate reserves. Nearshoring within North America does not yield meaningful phosphate capacity. Any strategy that takes food security seriously must therefore look beyond the Western Hemisphere, and weigh both the geology and the geopolitics of available options.

Why the Maghreb, and Why Now

Morocco is estimated to hold roughly 70% of the world's known phosphate reserves - a level of concentration rarely seen in the modern resource economy. The country's state-backed OCP Group has spent three decades turning the country into a phosphate power.

But the geopolitical alignment is equally important, and too often overlooked. Morocco is the oldest African ally of the United States, a relationship formalized by the 1786 Treaty of Friendship, which remains in force today. This strategic partnership was further strengthened when Morocco was designated a Major Non-NATO Ally in 2004, reflecting its long-standing role as a reliable security partner and gateway between Africa, Europe, and the Atlantic world. Tunisia received the same designation in 2015, granting access to enhanced defense cooperation, financing mechanisms, military training, and preferential procurement opportunities. Together, Morocco and Tunisia maintain deep economic ties with Europe and have long been important partners of both Europe and the United States, serving as pillars of stability, moderation, and transatlantic engagement in a Mediterranean region increasingly shaped by geopolitical competition and external influence.

This presence matters now because the window for meaningful influence is narrowing. Chinese port investments extend across North Africa. Russian influence, projected through the Wagner network and its successor structures, has spread southward through the Sahel. The strategic vacuum in the Maghreb is not waiting to be filled. It is already being filled. A phosphate partnership is also a presence.

Global economic stagnation, democratic backsliding in Tunisia, and the unresolved Western Sahara file all create instability that external powers are actively exploiting. American engagement grounded in genuine economic partnership - rather than security assistance conditioned on democratic performance - would be an effective and durable means of retaining influence across the region, while simultaneously ensuring security around phosphate supply.

Morocco’s Existing Strategic Advantage

Any serious effort to build a robust fertilizer architecture aligned with Western supply-chain security interests in the Maghreb must begin with Morocco. The Kingdom already occupies a uniquely dominant position within the global phosphate economy. Through the OCP Group, Rabat has developed sophisticated

refining, processing, and fertilizer manufacturing capabilities while investing heavily in African supply chains and agricultural technology partnerships.

Morocco's phosphate strategy is therefore not merely extractive; it is industrial and geopolitical. Its Atlantic-facing infrastructure - particularly the Tanger Med port complex, one of the most capable logistics hubs in the Mediterranean basin - has enabled Morocco to become a gateway connecting Europe, Africa, and global maritime trade routes. Rabat has extended this logic across West Africa, financing agricultural partnerships and fertilizer access programs designed to strengthen food production across the continent.

Yet Morocco alone cannot fully guarantee long-term Western fertilizer resilience. Overreliance on a single supplier - even a close American partner - creates its own strategic vulnerabilities. Geographic diversification and redundant capacity are requirements of serious supply chain strategy, not optional enhancements.

Tunisia as the Missing Strategic Link

Morocco's dominance, however, is precisely what makes a second node necessary, and what makes Tunisia the logical complement rather than a competitor.

A supply architecture concentrated in a single country, however capable and however allied, carries an inherent fragility. The lesson of the China shock is not simply that adversaries are unreliable; it is that concentration itself becomes a strategic vulnerability. Resilience requires diversification.

Tunisia should therefore be understood not as the United States' only alternative phosphate partner, but as an underappreciated strategic complement within a wider diversification strategy. Other suppliers and producers will necessarily remain part of any serious resilience framework. What makes Tunisia particularly relevant is the combination of significant reserves, proximity to Europe, existing phosphate-related industrial capabilities, and the possibility of deeper integration with Morocco's more advanced fertilizer ecosystem. Tunisia's value lies in the redundancy, geographic balance, and Mediterranean depth to a supply chain that has become dangerously concentrated.

Tunisia possesses approximately 2.5 billion metric tons of phosphate reserves and occupies a critical position along the central Mediterranean corridor. For decades, underinvestment, labor disruptions, and political turbulence have constrained production far below its technical potential. Yet these very constraints create an opportunity for modernization and strategic investment.

Tunisia's comparative advantage is not scale, but strategic positioning. Located between Morocco's Atlantic platform and Southern European markets, it could connect Western Mediterranean supply chains without creating new chokepoints. Its ports, industrial base, and access to Mediterranean and African markets make it a natural complement to Morocco's existing phosphate ecosystem.

A coordinated U.S.-backed Morocco-Tunisia partnership could modernize Tunisian extraction, transportation, and processing infrastructure while reinforcing Morocco's established industrial leadership. Morocco would remain the industrial and logistical anchor of the corridor, while Tunisia would provide additional production capacity, geographic diversification, and expanded Mediterranean access.

Such a partnership should not be understood as a transfer of control over Tunisian resources, nor as a simple extension of Moroccan influence. Its logic would be industrial rather than hierarchical: joint ventures, shared processing capacity, coordinated logistics, technology transfer, and cross-border infrastructure projects that generate value for both countries. Morocco would contribute scale, expertise, financing capacity, and global market access; Tunisia would contribute resources, industrial know-how, strategic geography, and additional Mediterranean capacity. Properly structured, the relationship would be mutually reinforcing rather than competitive.

The resulting architecture would strengthen fertilizer access not only for the United States and Europe but also for food-insecure regions across Africa. Importantly, such a framework should not be viewed as an exclusive arrangement. Should political and economic conditions permit, broader Maghreb participation would only strengthen regional resilience and supply security. The objective is not to exclude any regional actor, but to begin with the partners currently best positioned to support a viable and rapidly deployable phosphate architecture.

Building a Trans-Maghreb Fertilizer Corridor

Rather than relying on domestic subsidies that address symptoms while the underlying supply chain vulnerability persists, Washington should pursue a long-term "Phosphate-for-Infrastructure" strategy centered on industrial modernization and supply chain resilience. Under such a framework, the United States - working alongside multilateral institutions including the World Bank, the African Development Bank, the U.S. International Development Finance Corporation, and European development agencies - could support:

- Modernization of Tunisian mining infrastructure and extraction technology
- Expansion of rail and port logistics connecting Tunisian production to Mediterranean export routes
- Fertilizer processing facilities capable of producing finished product for European and African markets
- Environmental remediation technologies to reduce the degradation associated with legacy extraction systems
- Integrated digital logistics platforms linking Tunisian and Moroccan supply chains
- Workforce development and technical training programs to stem the ongoing brain drain of Tunisian engineering talent

Governance, Stability, and Strategic Conditionality

No durable economic partnership can thrive in a political vacuum. Under President Kais Saied, Tunisia has experienced democratic backsliding, institutional centralization, and mounting debt pressures, all of which have weakened investor confidence and complicated relations with Western partners. Any large-scale phosphate partnership should therefore include clear benchmarks on transparency, regulatory predictability, and institutional accountability.

At the same time, Washington should avoid treating Tunisia solely through the lens of democratic conditionality. Strategic infrastructure investment can create incentives for gradual reform through economic integration, rather than deepening isolation and stagnation. The objective should be to pair long-term industrial engagement with practical governance safeguards.

At its core, however, this is not simply a Mediterranean strategy. It is a food security strategy. Every American farmer depends on reliable fertilizer supplies, and every disruption in phosphate markets ultimately affects food prices, agricultural competitiveness, and national resilience.

For Washington, the value of such a corridor lies not only in regional stabilization, but in securing access to a critical input upon which American agricultural productivity depends. Regional integration and food security are not competing objectives; in this case, they reinforce one another.

A Strategic Pivot for a Fragmented World

A Morocco-Tunisia fertilizer corridor would do far more than secure phosphate supplies. It would establish one of the first resilient trans-Maghreb industrial corridors

aligned with American economic, food security, and strategic interests. At a time when global supply chains are increasingly vulnerable to geopolitical shocks, maritime disruptions, and great-power competition, such a corridor would provide the United States and its allies with a trusted and diversified source of critical agricultural inputs while reducing dependence on less reliable suppliers.

By linking Morocco's industrial strength, logistical infrastructure, and global fertilizer leadership with Tunisia's strategic position at the crossroads of the central Mediterranean, Washington would help anchor a new framework of economic cooperation in North Africa. This would not be a traditional security alliance based on military deployments or coercive leverage, but a partnership rooted in industrial integration, economic resilience, and shared prosperity.

The geopolitical implications are significant. In a region increasingly exposed to the competing influences of China, Russia, Iran and Turkey, a stronger Morocco-Tunisia partnership would reinforce a stable and cooperative Mediterranean architecture while creating incentives for deeper regional connectivity. It would also reduce opportunities for strategic competitors to acquire leverage through infrastructure financing, port investments, or commodity supply dependencies.

Perhaps most importantly, such a corridor would transform economic interdependence into a practical instrument of regional stabilization. For decades, the Maghreb has suffered from fragmentation, missed opportunities, and limited economic integration. A Morocco-Tunisia industrial partnership would represent a rare example of regional cooperation driven not by political declarations but by shared economic interests, infrastructure, and long-term investment.

For Morocco, the corridor would consolidate its position as a global fertilizer leader and strategic gateway between Africa, Europe, and the Atlantic. For Tunisia, the benefits could be transformational: stronger investor confidence, accelerated infrastructure modernization, greater industrial capacity, and renewed momentum for long-delayed economic reforms.

Morocco should not view such cooperation through a narrow competitive lens. A stronger North African fertilizer value chain would not diminish Morocco’s role; it would reinforce the region’s collective weight in global fertilizer markets and increase both countries’ relevance for strategic partners such as the United States and Europe.

The geological endowment exists. The industrial capabilities already exist. The strategic alignment exists as well. What remains missing is the political vision to

connect these assets into a coherent and durable partnership. In an era of growing geopolitical competition, securing phosphate supply chains is no longer simply an agricultural concern. It is a matter of national resilience.