



December 16, 2021

Dear Mosaic Company,

We write to express our concern with your company's trade practices. As the second-largest phosphate fertilizer producer in the world, Mosaic has almost single-handedly erected an insurmountable tariff barrier to keep its top competitors in Morocco and Russia out of the U.S. phosphate market.

Mosaic's corporate affairs spokesperson recently told Brownfield Ag News that the company is trying to keep prices rational. Saying, "Prices are set essentially by the global supply and demand picture...we don't dictate prices."

Yet, thanks to Mosaic's petition, only 15% of phosphorous imports now come into the U.S. without tariffs. And experts say that using Commerce and ITC to manipulate the supply curve does indeed dictate price to farmers.

According to farm economist Bob Young's estimate, "the economic impact of applying countervailing duties of between 30% and 70% on phosphate imports would equate to roughly \$480 to \$640 million in added fertilizer bills on U.S. farmers."

You'll agree that Mosaic now has a much healthier balance sheet than it did in 2017-18, when you and J.R. Simplot began pursuing the CVD case. You'll also concede that you did not anticipate China's phosphate export ban, the COVID-19 black swan event, rising natural gas prices, a historic supply chain disaster and Hurricane Ida.

Mosaic's posture to date has been a masterpiece of irresponsible corporate social responsibility. But it now has an elegant way to reverse course given these exceptional circumstances.

We ask that you voluntarily withdraw your countervailing duties and allow critical supply back into the U.S. at a time of inadequate supplies and soaring phosphate prices.

Precedent exists for reaching a voluntary settlement. For instance, in August 2019 the U.S. tomato industry resolved its anti-dumping dispute with Mexico voluntarily rather than escalate tensions and further disadvantage producers on both sides of the border.

We look forward to your swift action to withdraw the CVDs. In the meantime, please be advised that we will relentlessly pursue a resolution on this issue.

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Sincerely,

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