FOOD IS ENERGY

Food security begins long before the farm gate. Modern agriculture depends on oil and natural gas to produce sulfur, ammonia, and the fertilizers that determine crop yields. Those yields influence livestock feed costs, while processing, refrigeration, rail, trucking, and shipping carry those costs through the rest of the food system. Every link in the chain runs on energy.

When a strategic waterway is disrupted, an adversary restricts exports, or domestic capacity proves too concentrated, the effects do not appear immediately at the grocery register. They move through seasonal fertilizer purchases, planting decisions, livestock cycles, transportation costs, and infrastructure constraints. A falling gasoline price therefore does not guarantee lower food prices, and a temporary reopening of a shipping lane does not eliminate the underlying vulnerability. Food is increasingly part of the economic battlespace, where control of energy, industrial processing, logistics, and critical inputs can create leverage over nations and households. These conditions must be understood, anticipated, and planned around rather than treated as isolated crises that will simply pass.

WATCH NOW

In this briefing we will discuss the following:

- Food as a Battlespace: How Energy, Fertilizer, and the Strait of Hormuz Drive Food Security and Grocery Prices
- Strategic Supply Chain Warfare: China's Fertilizer Leverage, America's Domestic Vulnerabilities, and the Need for Greater Resilience
- Preparing for a Long-Term Economic Conflict: Personal and National Strategies for Resilience, Investment, and Food Security

YOUR MISSION: Recognize how energy, fertilizer, strategic chokepoints, foreign leverage, and domestic vulnerabilities shape America's food security, then use that understanding to make informed personal, financial, and policy decisions that build lasting resilience.

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WHY YOU SHOULD CARE

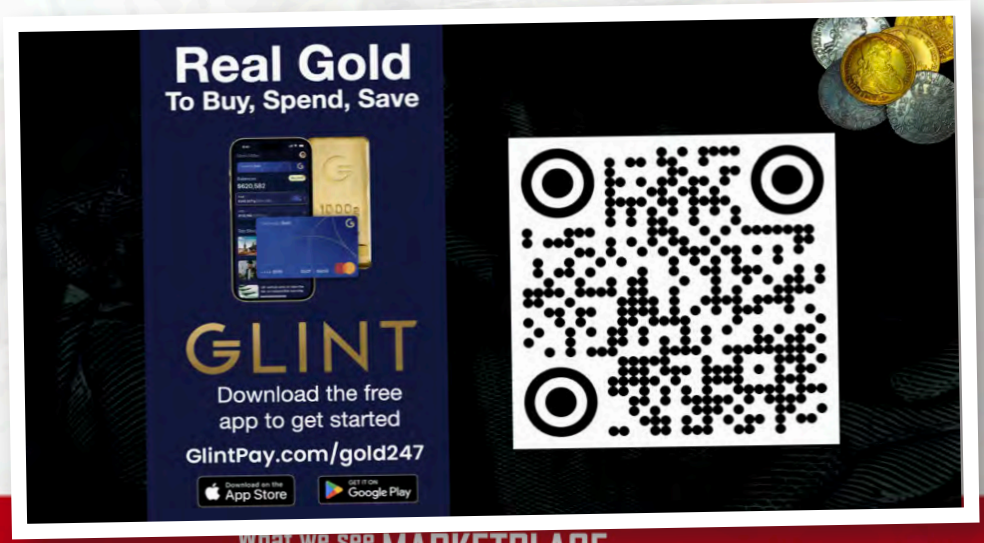
» **Your grocery bill begins with energy**.
Food prices are shaped long before products reach the supermarket. Oil, natural gas, fertilizer production, refrigeration, transportation, and global shipping all influence what families ultimately pay at the register.

» **Overseas disruptions eventually reach American households.**
A closure or slowdown in the Strait of Hormuz, a fertilizer export restriction, or a surge in shipping and insurance costs lands first on producers. Months or even years later, those pressures can appear through reduced crop yields, higher livestock-feed costs, and more expensive food.

» **Supply-chain shocks operate on delayed timelines.**
Fertilizer is purchased seasonally, crops require time to grow, and cattle herds take years to rebuild. Understanding these lags allows households, businesses, investors, and policymakers to prepare before today's disruption becomes tomorrow's food bill.

» **America has created vulnerabilities of its own.**
Heavy dependence on imported potash, concentration within domestic fertilizer markets, aging infrastructure, and regulatory barriers create single points of failure even without hostile foreign action. Efficiency without redundancy can leave essential systems unable to absorb shocks.

» **Preparation preserves freedom of action.**
A rotating food reserve, relationships with local producers, backup plans for water and power, diversified supply chains, and disciplined investment analysis create practical options. Preparation is not panic; it is the margin that allows individuals and nations to make deliberate decisions under pressure.



Ep. 11-409 (OSINT) Open-Sourced Intelligence Report. This briefing is an exclusive teaching by Kevin D. Freeman, CFA, D.Sc. (h.c.).

Kevin Freeman is considered one of the world's leading experts on the issues of Economic Warfare and Financial Terrorism. He has consulted for and briefed members of both the U.S. House and Senate, present and past CIA, DIA, FBI, SEC, Homeland Security, the Justice Department, and local and state law enforcement. His research has been presented in critical DoD studies on Economic Warfare, Iran, and Weapons of Mass Destruction to the Secretary of Defense and the Under Secretary of Defense, Intelligence. He has traveled extensively with research trips to Russia and China and throughout Europe and the Americas. He is also a contributing editor for Tactics and Preparedness magazine.

Kevin is a co-founder of the NSIC Institute; Host of Pirate Money Radio; Speaker of the Cherokee Community of North Texas; a Senior Fellow at the Center for Security Policy; former Trustee at Oklahoma Wesleyan University; and a member of the Advisory Board of First Liberty Institute.

1. Food as a Battlespace: How Energy, Fertilizer, and the Strait of Hormuz Drive Food Security and Grocery Prices

Food production is fundamentally an energy system. Long before food reaches a farm, processing plant, or grocery store, it begins with crude oil and natural gas.

The chain has two primary branches. In the first, oil and natural gas refining produces elemental sulfur as a byproduct. That sulfur becomes sulfuric acid, which is used to convert phosphate rock into phosphoric acid for phosphate fertilizers such as DAP and MAP. In the second, natural gas is converted into ammonia and then into urea, the world's most widely used nitrogen fertilizer. Natural gas is not a minor input in this process; it accounts for most of the cost of producing ammonia.

These fertilizers determine crop yields. Crop yields determine the cost of livestock feed. Feed costs influence the price of beef, pork, poultry, and dairy products. After harvest, food must still be processed, refrigerated, stored, and transported by truck, rail, barge, or ship. Every link depends on energy.

"Food is energy, and energy is a battle space." –Kevin Freeman

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This explains why lower gasoline prices do not immediately produce lower grocery bills. Each part of the food system operates on a different timeline. Diesel costs can change quickly, but fertilizer is purchased months before planting. Crops require a full growing season. Cattle herds take years to rebuild. An energy or shipping shock therefore moves through the food system slowly, appearing at the grocery register long after the original disruption has faded from the headlines.

The Strait of Hormuz concentrates many of these risks in one narrow waterway. A strategic chokepoint is a geographic or logistical passage through which a significant share of essential trade must move. At only 33 miles wide at its narrowest point, the Strait carries roughly one-third of the world's seaborne fertilizer trade, including about 40 percent of globally traded urea and 44 percent of seaborne sulfur.

When shipping through the Strait is interrupted—or merely becomes too dangerous or expensive—fertilizer markets react quickly. Urea prices can surge, sulfur supplies tighten, shipping insurance rises, and producers reduce output because they cannot secure affordable inputs. Commercial traffic may continue in technical terms while operating at only a fraction of normal levels. The decisive question is not simply whether a loaded vessel can leave the region, but whether shipowners are willing to send empty vessels back into contested waters.

That uncertainty becomes a cost of its own. Insurers raise premiums. Carriers reroute ships. Businesses delay commitments. Farmers face higher fertilizer bills during fixed seasonal purchasing windows, often without the ability to pass those costs along. The consequences then move down the chain into planting decisions, livestock production, and household food budgets. Across 2026 this played out as a round trip and then a reversal: world urea ran from roughly $400 a metric ton toward $850 by April, fell back near $453 in June when a peace deal briefly reopened the lane, then climbed again within days when the strikes resumed. Spike, collapse, spike again—which is precisely why this is a condition to be managed rather than a crisis to be waited out.

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> "A crisis has an ending. That's a condition. And a condition is something you plan around, not something you wait out." –Kevin Freeman

The effects are already visible in the pressures facing farmers and consumers. More than 70 percent of surveyed farmers reported that they could not afford all the fertilizer needed for the coming crop. At the same time, the American cattle herd has fallen to its smallest level in 75 years, while ground chuck has reached record prices. These problems cannot be reversed by a single policy announcement or a temporary decline in commodity prices. Fertilizer shocks affect future harvests, and rebuilding livestock capacity requires years.

Food security must therefore be understood as more than an agricultural issue. It depends on reliable energy, accessible fertilizer, secure shipping lanes, functioning infrastructure, and sufficient capacity throughout the supply chain. Once those dependencies are visible, the next question is unavoidable: who controls the critical inputs and processing capacity upon which that system depends?

⚠ **Attention: Energy and fertilizer chokepoints transform food from a domestic agricultural concern into a strategic battlespace whose disruptions can shape household budgets for years.**

2. Strategic Supply Chain Warfare: China's Fertilizer Leverage, America's Domestic Vulnerabilities, and the Need for Greater Resilience

The previous section demonstrated that modern food security depends on energy, fertilizer, and global transportation. The next question is equally important: who controls those critical inputs? Increasingly, the answer determines who holds strategic leverage.

China has spent decades building dominance not by owning the world's resources, but by controlling the industrial capacity needed to process them. This distinction matters. While China possesses only about five percent of global phosphate reserves, it has accounted for more than 40 percent of global phosphate production through sustained investment, government support, and refining capacity. In strategic competition, processing dominance can be more valuable than resource ownership.

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That advantage becomes particularly powerful during periods of market stress. Rather than increasing exports when fertilizer supplies tightened, China restricted shipments of nitrogen fertilizers, potassium blends, certain phosphate products, and sulfuric acid—the very chemical required to convert phosphate rock into usable fertilizer. Restricting both the finished product and one of its essential processing inputs magnifies leverage across the entire agricultural supply chain.

> "The vulnerability was never in the closure. The vulnerability is the waterway." –Kevin Freeman

This reflects a broader pattern that has emerged across multiple strategic industries. The same playbook has been used with rare earth elements, gallium, germanium, and other critical materials: build processing dominance, become indispensable to global markets, and then use supply restrictions as a tool of economic influence.

America, however, faces more than foreign vulnerabilities. It has also created significant domestic ones.

More than 90 percent of U.S. potash consumption is imported, with the overwhelming majority coming from a single allied nation. Potash—alongside nitrogen and phosphate—is one of the three essential nutrients required for modern crop production. While Canada remains a trusted partner, dependence on any single supplier for a strategic input reduces resilience should trade routes, production, or geopolitical relationships change.

Domestic market concentration presents an additional challenge. Four companies control roughly three-quarters of America's nitrogen fertilizer production, while only a handful dominate other key agricultural inputs. Decades of consolidation reduced costs during stable periods but also reduced redundancy, leaving fewer alternatives when disruptions occur. Even sulfur presents a strategic dilemma. The United States produces much of what it needs, yet significant quantities are exported into markets that may later restrict

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the finished fertilizer products American farmers require. What is genuinely new in this phase is that the waterway itself is being eyed as a revenue instrument: Iran has worked to push commercial vessels onto routes it controls and collect passage fees, while U.S. officials have floated "guarding" the strait and being reimbursed for it, including a briefly discussed toll on Hormuz shipping. A sea lane converted into a toll booth is one more price set by someone else on the American dinner table.

> "Efficiency and resilience are the same dial turned in opposite directions." –Kevin Freeman

The lesson extends beyond fertilizer. Whether examining concentrated agricultural processing, critical mineral refining, or even food distribution itself, the same principle applies: systems optimized exclusively for efficiency often sacrifice the redundancy needed to withstand disruption. Concentration may lower costs during normal conditions, but it also creates attack surfaces that require little effort to exploit. The largest foodborne illness outbreak linked to a single lettuce source illustrates that not every vulnerability requires malicious intent—some simply emerge because too much capacity depends on too few suppliers.

Building resilience therefore requires more than responding to individual crises. It requires strengthening domestic refining capacity, diversifying supply chains among reliable allies, modernizing transportation and industrial infrastructure, reducing unnecessary permitting delays, and avoiding excessive dependence on any single supplier or processing hub. Economic resilience is built through diversity, redundancy, and the ability to adapt when conditions change.

These structural improvements cannot eliminate every disruption, but they can reduce the ability of competitors to weaponize America's supply chains. Once those vulnerabilities are addressed, the focus shifts from identifying the risks to determining how households, investors, businesses, and policymakers should respond.

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Attention: Strategic resilience depends on reducing dependence—whether on a foreign processor, a single supplier, or an overly concentrated domestic market—before those vulnerabilities become instruments of economic coercion.

3. Preparing for a Long-Term Economic Conflict: Personal and National Strategies for Resilience, Investment, and Food Security

If the vulnerabilities in America's food system are structural, then the response must be structural as well. Strategic resilience is not built by predicting the next disruption, but by reducing dependence on fragile supply chains before the next disruption occurs.

At the national level, that means expanding competitive domestic capacity in fertilizer production, chemical processing, refining, and natural gas. It means diversifying imports among trusted allies rather than relying on any single supplier for essential agricultural inputs. It means strengthening the physical infrastructure that keeps food moving—railroads, ports, barges, pipelines, storage facilities, and irrigation systems—and accelerating responsible permitting so that projects measured in decades can begin addressing challenges measured in months. Carefully designed, sunset-dated strategic inventories of critical nutrients and sulfur can also provide temporary resilience without becoming permanent government programs.

Equally important is recognizing what doesn't solve the problem. Price controls do not create more fertilizer. Permanent subsidies do not eliminate structural shortages. Long-term resilience comes from expanding capacity, increasing competition, and restoring redundancy throughout the supply chain.

> "A crisis has an ending. That's a condition. And a condition is something you plan around, not something you wait out." –Kevin Freeman

The same principle applies at the household level.

Preparation is not about fear; it is about preserving the freedom to make thoughtful decisions when disruptions occur. A practical, rotating thirty-day pantry of foods your family

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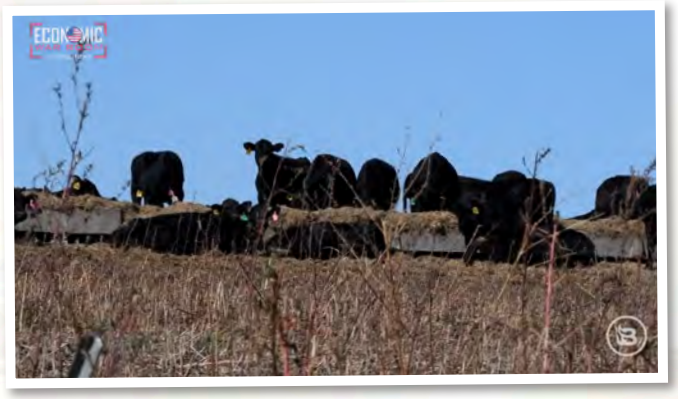
already eats—rice, beans, oats, canned proteins, cooking oil, salt, coffee, and other staples—is not an extreme measure. It simply creates time. Backup plans for refrigeration, cooking, and water provide additional flexibility during temporary outages. Relationships with local farmers, ranchers, churches, and community organizations restore the local resilience that decades of just-in-time supply chains gradually eliminated.



Investment strategy follows the same logic. Rather than chasing temporary commodity price spikes, investors should examine the infrastructure that supports the entire food system: natural gas production, fertilizer manufacturing, farm equipment, irrigation, grain storage, cold-chain logistics, railroads, ports, barges, and domestic processing capacity. These businesses may not generate headlines during every market cycle, but they often represent durable assets positioned to benefit from long-term structural demand.

"Provision is not fear. Provision is faithfulness." –Kevin Freeman

Ultimately, this conversation is about stewardship rather than speculation. Throughout history, societies that prepared during periods of abundance were better positioned to endure periods of disruption. Preparation should never become panic, nor should stewardship become hoarding. The goal is to build enough resilience to care not only for your own household but also for your community when unexpected challenges arise.

For readers seeking a deeper exploration of these themes, The Four Horsemen of the American Apocalypse and Our Six Trials by Fire examines the strategic, economic, and cultural forces shaping America's future in greater detail. Additional charts, source materials, and checklists accompanying this episode are available at EconomicWarRoom.com, while those seeking personalized investment guidance can locate a qualified, values-aligned financial advisor through the NSIC Institute.

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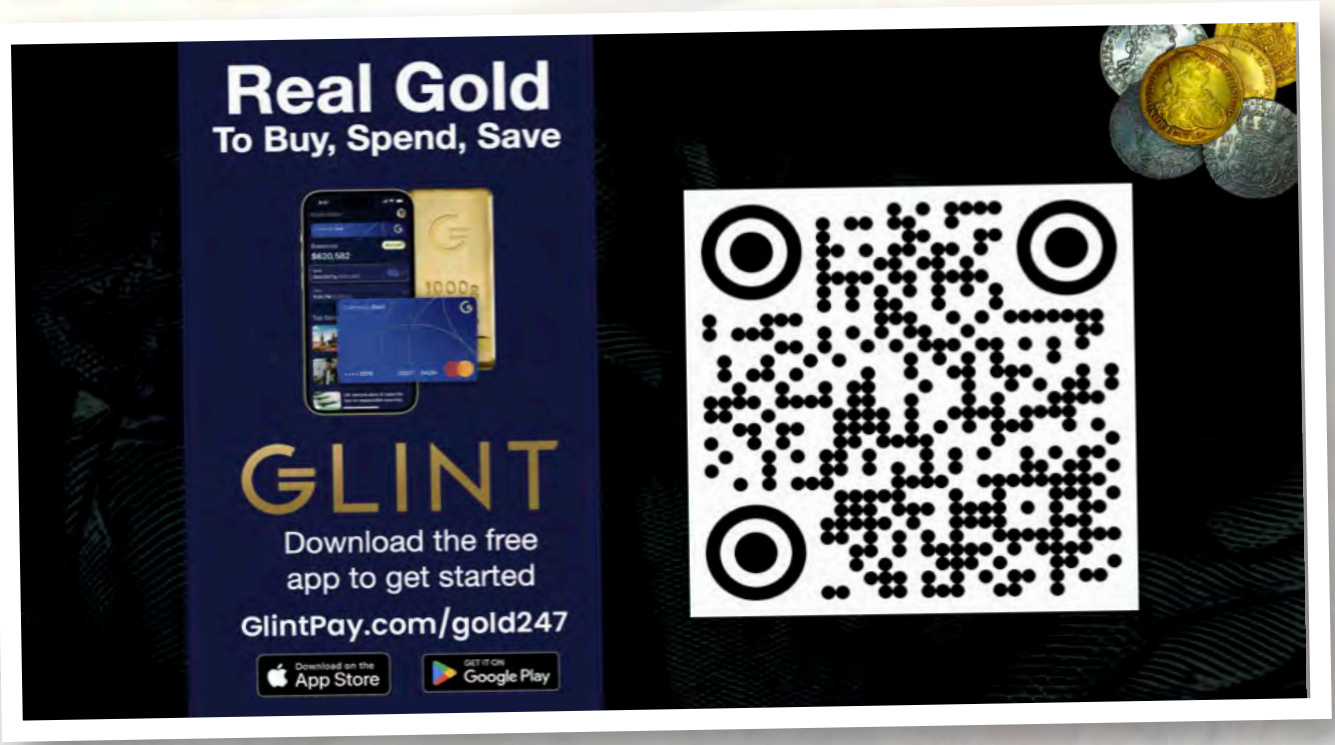
The objective is not to predict every crisis. It is to build the capacity to withstand them. Nations that diversify supply chains, strengthen domestic production, and invest in resilient infrastructure become more difficult to coerce. Households that prepare thoughtfully gain the freedom to respond with confidence rather than urgency.

⚠ **Attention: Lasting food security is built through preparation, diversified supply chains, strengthened domestic capacity, and faithful stewardship that creates resilience before—not after—the next disruption occurs.**



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ACTION STEPS:

1. **Check out the charts at the end of this document so you can recognize that these markets can change in days rather than months.**
2. **Continue your research by reading *The Four Horsemen of the American Apocalypse and Our Six Trials by Fire*, and if you would like personalized guidance on positioning your investments, connect with a values-aligned financial professional through the NSIC Institute.**
3. Trace the complete energy-to-food supply chain—from oil and natural gas to fertilizer, crop yields, livestock, transportation, and grocery prices—so you understand where America's greatest strategic vulnerabilities and chokepoints exist.
4. Strengthen your household's resilience by building a rotating 30-day pantry of foods you already eat, evaluating your backup plans for water, refrigeration, and cooking, and maintaining sufficient emergency purchasing flexibility for temporary disruptions.
5. Build relationships with local farmers, ranchers, food producers, churches, and co-ops to reduce dependence on distant supply chains and strengthen your community's resilience before disruptions occur.
6. Evaluate your investments through the lens of long-term infrastructure and supply-chain resilience by studying industries such as natural gas, fertilizer production, irrigation, grain storage, transportation, ports, rail, and domestic processing rather than simply chasing short-term commodity price movements.
7. Support policies and business practices that expand domestic production, diversify supply chains among trusted allies, strengthen critical infrastructure, and reduce reliance on concentrated suppliers, recognizing that long-term food security is built through resilience rather than reaction.

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3. **Get a copy of According to Plan to better understand these domestic attacks on our Liberty as well as the overall Marxist plan to consume America.**
4. Seek opportunities to inspire other Americans to stand up for what is right.
5. Send them this Economic Battle Plan™ and ask them what they are doing to stand for America and Liberty!
   - » Elect Politicians that understand the need to preserve American Liberty.
   - » Encourage and ask your elected officials to educate themselves.
   - » Ask them how they are working to strengthen our education system and reverse the push for Marxist indoctrination. These are big issues, if your representatives are not aware and working toward solutions directly or indirectly based on their committees, hold them accountable!

Your support for Transactional Gold and Silver Currency is critical! We have legislation advancing in 20+ states! Learn about progress in your state at https://transactionalgold.com/ and click the "Active States" button in the upper right-hand corner.

6. **Check your investments to see if they are helping fund the agendas of Globalist Elites. If you have a financial advisor insist that they give you an update and encourage them to become part of the NSIC.**

   Seek out investment opportunities in patriotic innovations. Financial Advisors can learn more at www.NSIC.org. Weaponize your money, your investing, spending, and giving!

ATTENTION: Clients already with a Financial Advisor - Make sure your financial advisor has your values and interests at heart. Make certain they really understand what ESG investments mean for our future. Suggest that they become part of the NSIC institute and nominate them to participate in our online certification at economicwarroom.com/advisor.

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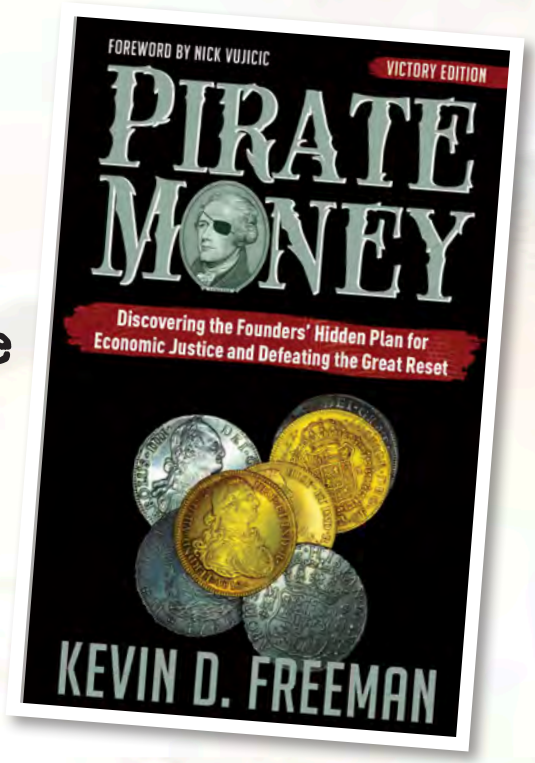
7. Be certain to buy Kevin's new book, *Pirate Money: Discovering the Founders" Hidden Plan for Economic Justice and Defeating the Great Reset*. Learn more at www.PirateMoneyBook.com.

"Pirate Money provides insights for those who want to participate in the protection of their financial future."

—Dr. Ben Carson



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PirateMoneyBook.com

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In the **Economic War Room®**, we encourage Americans to be the "little ships that make the difference." You cannot solely rely on the government or the president to solve America's problems. You have to make a difference. It is up to you to help take our country back and create a voice for economic liberty. [The little ships are based on Churchill's Operation Dynamo that rescued the British Expeditionary Forces in the Miracle of Dunkirk.]

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"Food is energy. And energy is a battle space. No fuel, no fertilizer, no food."

–Kevin D. Freeman, CFA, D.Sc. (h.c.); Host, Pirate Money Radio

"The vulnerability is that a waterway no American voter has any say over gets a vote on the price of American food."

–Kevin D. Freeman, CFA, D.Sc. (h.c.); Host, Pirate Money Radio

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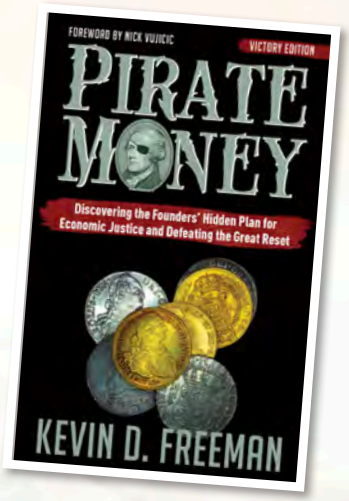

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Action Steps

Download the free charts, sources, and checklists accompanying this episode at EconomicWarRoom.com, then use them to verify current fertilizer, sulfur, shipping, and supply-chain conditions, recognizing that these markets can change in days rather than months.

Continue your research by reading *The Four Horsemen of the American Apocalypse and Our Six Trials by Fire*, and if you would like personalized guidance on positioning your investments, connect with a values-aligned financial professional through the NSIC Institute.

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Watch The Economic War Room episode on the Economic War of the Heart

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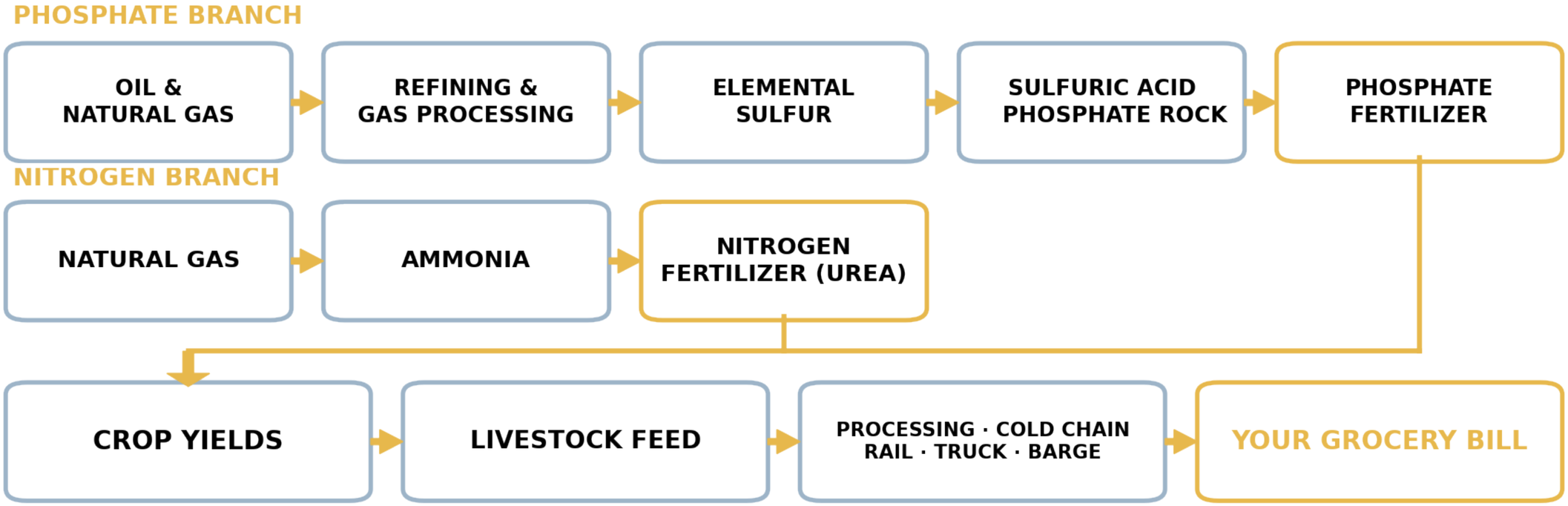
THE CHAIN BEHIND YOUR GROCERY BILL

FOOD IS ENERGY

Every link runs on hydrocarbons — and every link has a chokepoint



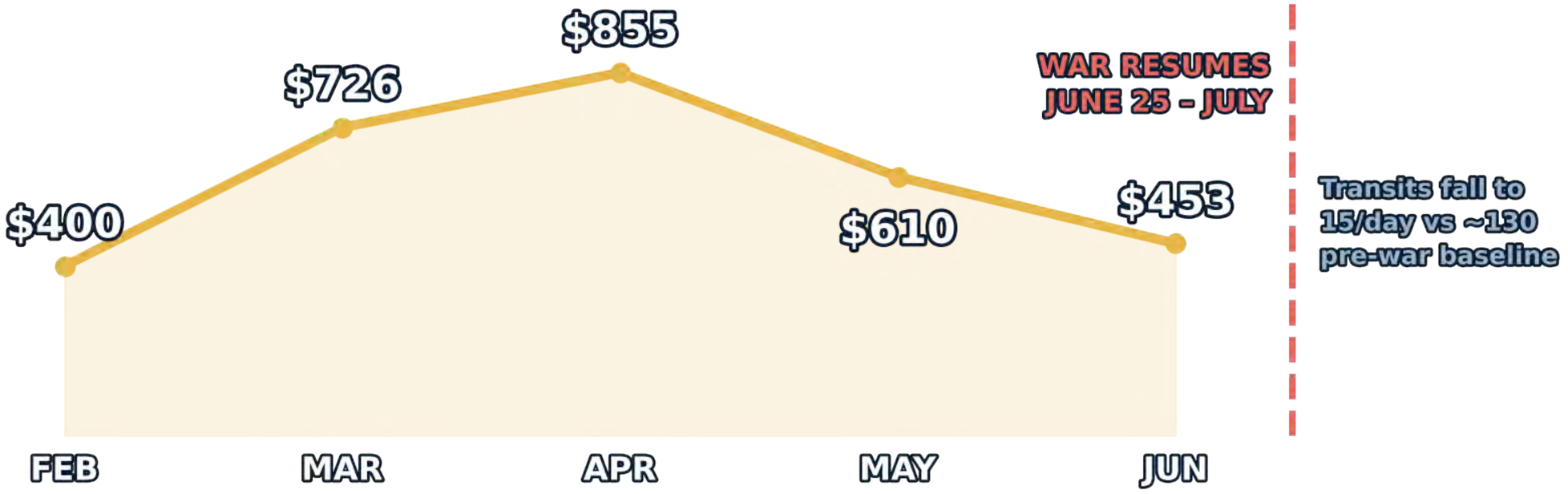
Sources: World Bank CMO, Apr 2026 · USGS · S&P Global. Verify independently.

ECONOMIC WAR ROOM

WORLD UREA · US$ PER METRIC TON

THE ROUND TRIP

Doubled, halved, and back on a war footing — all inside five months



Source: World Bank CMO Apr 2026; WTO Data Blog 10 Jul 2026; IMF PortWatch. As of Jul 25, 2026 — verify.

ECONOMIC WAR ROOM

WHERE THE FOOD CHAIN CAN BE PINCHED

FIVE SQUEEZE POINTS

Not a supply chain — a supply rope

1/3

of world seaborne FERTILIZER trade moves through the Strait of Hormuz

~50%

of world seaborne SULFUR exports were trapped behind that strait

50-75%

of China's 2025 fertilizer exports are now under ban or quota

4

companies control ~75% of the U.S. NITROGEN market

87%

of U.S. POTASH imports come from a single country: Canada

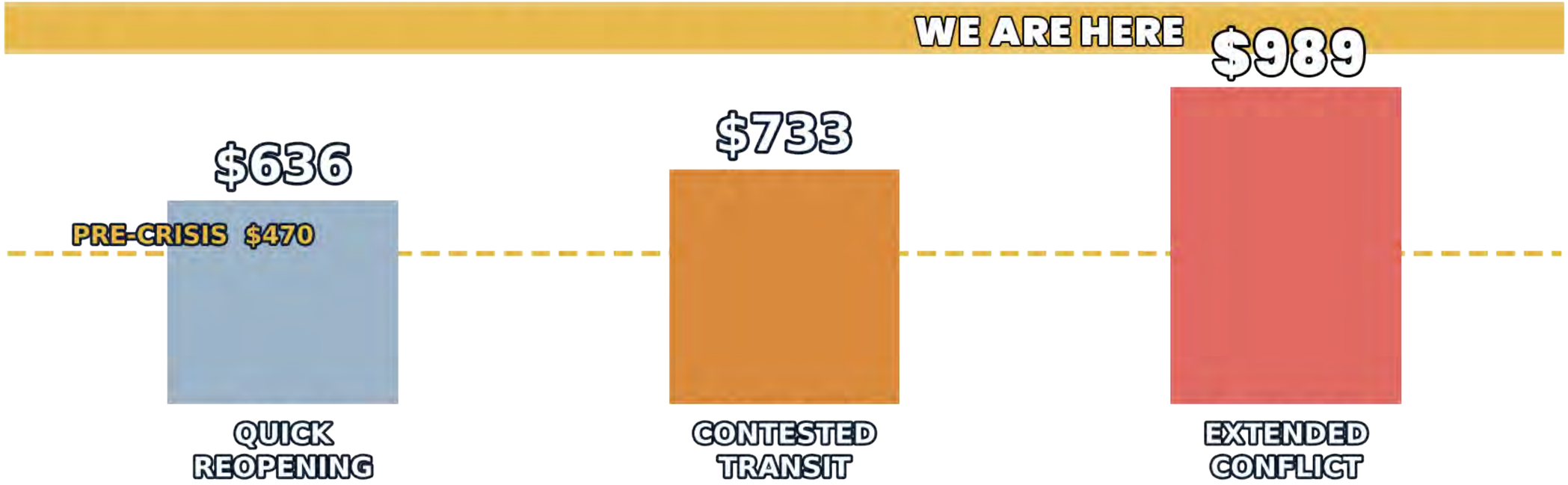
Sources: World Bank · S&P Global · Reuters/Bloomberg · USDA. Estimates — verify independently.

ECONOMIC WAR ROOM

NDSU FERTILIZER MODEL · FALL 2026 PREPAY UREA

WHICH FUTURE ARE WE IN?

US$ per short ton, NOLA – three scenariors modeled in April 2026



Source: Arita et al., NDSU / farmdoc daily (16):75, Apr 29 2026. Projections, not forecasts — verify.

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