

# IFA ANNUAL REPORT 2013





## **IFA ANNUAL REPORT 2013**

Report of the Council of the 86th year to be presented to the Annual General Meeting on 28 May 2014

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“ONLY BY COOPERATION BETWEEN THE PRIVATE SECTOR, RESEARCH INSTITUTES, THE PUBLIC SECTOR AND REGIONAL, NATIONAL AND SUPRANATIONAL GOVERNANCE CAN WE FACE THE CHALLENGES THAT LIE AHEAD IN OUR BATTLE AGAINST HUNGER AND MALNUTRITION”

## FROM THE PRESIDENT

In view of the attention currently being given to food security, nutrition and family farming, the fertilizer industry is in a unique position to demonstrate its global role in promoting food security, improving nutrition, and reaching farmers big and small in every region of the world to provide them with the nutrients they need for their crops and teach them how to best use these nutrients.

By providing the essential nutrients for crop growth, fertilizers are an essential ingredient in the drive towards world food security. Our products help increase crop yields and food production, thus helping to feed an increasing global population. Our advocacy efforts are aimed at informing policymakers that increasing fertilizer application in areas such as Sub-Saharan Africa (where increased application would have a tremendous impact on yields) would in turn improve the livelihoods of rural farmers in those regions.

Millions of children and women worldwide suffer from micronutrient deficiencies that have irreversible impacts on their health, leading to stunting. Our industry has responded to this challenge with a solution. Micronutrient fertilization for zinc, iodine and selenium is one of the techniques that can immediately and quantifiably improve nutrition. IFA has been increasing its outreach efforts on nutrition and human health and will continue to do so.

We have a role to play in empowering smallholders to rise above subsistence and become commercial farmers through last-mile delivery, farmers' training, extension services, systems adapted to small farmers, and support for women farmers. IFA has already committed significant resources to making farmers' voices heard in international policymaking arenas by funding and chairing the Farming First coalition. I believe it is now time for us to go beyond policy and more actively pursue programmes where we will be able to demonstrate our commitment to rural development, gender equity, and overall economic development.



A handwritten signature in black ink, which reads "Esin Mete". The signature is fluid and cursive.



**Esin Mete**

PRESIDENT



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“THE LEVEL OF KNOWLEDGE ABOUT FERTILIZERS REMAINS LOW. A KEY OBJECTIVE OF IFA’S STRATEGIC PLAN, AGREED IN 2013, IS THEREFORE TO REDOUBLE OUR OUTREACH AND EDUCATION EFFORTS”

## FROM THE DIRECTOR GENERAL

It is a great pleasure to work for such a diverse and vibrant association. IFA's membership reached 542 – from 81 countries – in 2013! IFA members have unique opportunities and face numerous challenges, but they all contribute to promoting agricultural productivity for a global population that is expected to exceed 9 billion by 2050. Fertilizers continue to play an essential role: not only do they facilitate increased crop yields, but they also improve the incomes and livelihoods of farmers and rural populations around the world. Moreover, they ensure that land use is maximized, which in turn helps to stop encroachment on wild habitats, thus reducing carbon emissions from land-use change and supporting biodiversity.

Yet these important roles are not always recognized by policymakers, stakeholders and the public at large. The level of knowledge about fertilizers remains low. A key objective of IFA's strategic plan, agreed in 2013, is therefore to redouble our outreach and education efforts. Opinions are also often formed through negative events, such as the explosion of a fertilizer warehouse in Texas in April 2013, or misuse of fertilizers by terrorists, both with tragic consequences. Another key objective laid out in our strategic plan is the ongoing promotion of product stewardship throughout the entire fertilizer value chain. One means of doing this was to amend IFA's Product Stewardship Certification Programme, "Protect & Sustain", by the end of 2013 so that it now includes product security elements.

The fertilizer industry is a dynamic and vital industry whose contributions need to be better understood. Sadly, as in other industries, accidents and criminal abuse cannot be avoided altogether, but it is vitally important to keep product safety and security at the forefront in all of our efforts.



A handwritten signature in black ink that reads "Charlotte Hebebrand". The signature is fluid and cursive, written over a horizontal dotted line.

**Charlotte Hebebrand**

DIRECTOR GENERAL

# MEMBERSHIP

AT THE END OF 2013, THE NUMBER OF MEMBERS OF THE ASSOCIATION REACHED 542 COVERING 81 COUNTRIES. THE VARIOUS CATEGORIES OF MEMBERSHIP WERE REPRESENTED AS FOLLOWS:

<b>183</b> ORDINARY MEMBERS	⋮	<b>111</b> AFFILIATE MEMBERS	⋮	<b>203</b> ASSOCIATE MEMBERS	⋮	<b>45</b> CORRESPONDENT MEMBERS
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## DURING 2013, 44 NEW MEMBERS WERE ELECTED AS FOLLOWS:

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### ORDINARY MEMBERS

- Fertilizantes Tocantins Ltda (Brazil)
- Proguigel Quimica SA (Brazil)
- First Quantum Minerals Ltd (Canada)
- Wuzhoufeng Agricultural Science & Technology Co. Ltd (China P.R.)
- Hokuren Federation of Agricultural Cooperatives (Japan)
- FPM Sdn Bhd (Malaysia)
- Myanma Awba Group (Myanmar)
- Farmers World Limpopo (Pty) Ltd (South Africa)

### AFFILIATE MEMBERS

- FNA Fertilizer LP (Canada)
- GB Minerals Ltd (Canada)
- Atacama Minerals Chile, S.C.M. (a subsidiary of Sirocco Mining Inc. (Chile)
- Hanwha Ammonium Nitrate Services (Korea Rep.)
- Chatham Rock Phosphate Limited (New Zealand)
- Indorama Eleme Fertilizer & Chemicals Limited (Nigeria)
- International Institute of Tropical Agriculture (IITA) (Nigeria)
- Qatar Chemical and Petrochemical Marketing and Distribution Company (MUNTAJAT) Q.J.S.C. (Qatar)
- African Fertilizer and Agribusiness Partnership, Inc. (AFAP) (South Africa)
- GEOALCALI – A Highfield Resources Company (Spain)
- Pythagoras Investment Management LLC (United States)

### ASSOCIATE MEMBERS

- Fertinvest Pty Ltd (Australia)
- Worleyparsons (Australia)
- HATCH (Canada)
- Chinalight Resources Imp. & Exp. Corp. (China P.R.)
- Etherchem international Company Limited (China P.R.)
- Forbon Technology Co. Ltd (China P.R.)
- Jiangsu Right Machinery Group Co. Ltd (China P.R.)
- Shanghai Bi-Jing Agricultural Science and Technology Co Ltd (China P.R.)
- Suifenhe Longsheng Economic and Trade Co Ltd (China P.R.)
- Sineria Industries Ltd (Cyprus)
- El Waha Mining & Fertilizers (WAMFERT) (Egypt)
- Waqud (Egypt)
- BNP Paribas-Paris (France)
- Euroports (The Netherlands)
- Fertilizantes del Sur S.A.C. (Peru)
- Cotecna Inspection S.A. (Switzerland)
- Nectar Group Ltd (United Kingdom)
- CGB Enterprises Inc. (United States)
- Green Markets (United States)
- Lushbury Fertilizer Corporation (United States)
- Plant Surveys International – A Phillip Townsend Associates Inc. Company (United States)

### CORRESPONDENT MEMBERS

- David M. Ford (Australia)
- Paul A. Smith (Brazil)
- Abdallah El- Houari (Morocco)
- Gérard E. D'Aquin (United States)



## THERE WERE 22 RESIGNATIONS DURING THE YEAR:

.....

### ORDINARY MEMBERS

- Impact Fertilisers (Australia)
- PRISM Sulphur Corporation (Canada)
- Total Marketing Services (France)
- NPK Terminalis (Latvia)

### AFFILIATE MEMBERS

- South Boulder Mines (Australia)
- Urea Corp. (Australia)
- Rhodia (France)
- Solid Energy New Zealand Ltd (New Zealand)

### ASSOCIATE MEMBERS

- Viterra (Australia)
- DNV Certification BV (Belgium)
- Saipem (Italy)
- Arysta Lifescience Corporation (Japan)
- Seatrade Group (Pakistan)
- UTE – Universal Turbomachinery Equipment (Poland)
- Alfred C. Toepfer International (Singapore)
- Intertek Agricultural Services (Singapore)
- Comspain XXI S.A. (Spain)
- Muller Financial Ltd, Geneva Branch (Switzerland)
- IBE Trade Corp. (United States)

### CORRESPONDENT MEMBERS

- J.C. Ignazi (France)
- W.T. Ramsay (United States)
- Donald D. Day (United States)

## NAME CHANGES

.....

### ORDINARY MEMBERS

- Copebras Ltda (Brazil) has become Anglo American Fosfatos Brasil Ltda.
- Zhanhua Co. Ltd (China P.R.) has become Guangdong Zhanhua Enterprise Group Company.
- Grassland Fertilisers (Ireland) has become Grassland Agro.

### AFFILIATE MEMBERS

- Fertilizer Industry Federation of Australia (FIFA) has become Fertilizer Australia.

### ASSOCIATE MEMBERS

- Asiafert Trading Pte Ltd (Singapore) has become Phosagro Asia Pte Ltd.
- Transammonia (United States) has become Trammo.

## OTHER CHANGES

.....

### ORDINARY MEMBERS

- GPN S.A. (France) has been acquired by Borealis (Austria). Its name has been changed to Borealis Chimie.
- Zaklady Azotowe Pulawy S.A. (Poland) is now part of a group membership including five units of Grupa Azoty.
- Fertinagro Nutrientes, S.L. (Spain) has opted for a group membership under its parent company TERVALIS. The membership now includes Sephos S.A. in Senegal.
- Agrifos Holdings Inc. (United States) sold its fertilizer plant and is now developing a nitrogen fertilizer complex in Texas. Its membership has been transferred to the affiliate member category.

### AFFILIATE MEMBERS

- ThermPhos International B.V. (The Netherlands) has been declared bankrupt.
- Sunkar Resources plc (United Kingdom) has started commercial sales of its Chilisai phosphate rock from north-western Kazakhstan and its membership has been transferred to the ordinary member category.

### ASSOCIATE MEMBERS

- The membership of PETRONAS Chemicals Marketing Sdn Bhd (PCM) (Malaysia) is now part of the group membership of PETRONAS.
- Fertecon Research Centre Ltd (United Kingdom) has been acquired by CRU Group.
- Fertilizer & Chemical Consultancy Ltd (United Kingdom) has been acquired in full by Argus FMB and has changed its name to Argus FMB Consulting.
- We have been informed that Acta Fertilizers DMCC (U.A.E.) is under termination process.

# EXECUTIVE COMMITTEE

MAY 2013 - MAY 2014

## CHAIRMEN GENERAL STANDING COMMITTEES



PRODUCTION &  
INTERNATIONAL TRADE  
COMMITTEE

**Feng Zhibin**

Sinofert Holdings Ltd  
China



AGRICULTURE  
COMMITTEE

**Jørgen Ole  
Haslestad**

Yara International ASA  
Norway

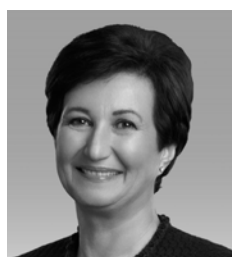


TECHNICAL AND SHE  
COMMITTEE

**Jim Prokopanko**

The Mosaic Company  
USA

## EXECUTIVE MANAGEMENT GROUP



PRESIDENT

**Esin Mete**

Toros Agri Industry  
and Trade Co. Inc.  
Turkey



SENIOR VICE  
PRESIDENT

**Eugenio Ponce**

Sociedad Quimica y  
Minera de Chile S.A.  
(SQM)  
Chile



VICE PRESIDENT  
SUSTAINABLE  
DEVELOPMENT

**Abdulrahman  
Jawahery**

Gulf Petrochemical  
Industries Co. (GPIC)  
Bahrain



VICE PRESIDENT  
MEMBER OF THE EMG

**Arifin Tasrif**

P.T. Pupuk Indonesia  
(Persero) Holding  
Company  
Indonesia



MEMBER OF THE  
EMG (EX OFFICIO)

**Charlotte  
Hebebrand**

IFA  
France



IMMEDIATE PAST  
PRESIDENT

**William J. Doyle**

PotashCorp  
Canada



CHAIRMAN  
FINANCE  
COMMITTEE

**Mostafa Terrab**

OCP  
Morocco

## REGIONAL VICE PRESIDENTS

---



### AFRICA

#### **Alassane Diallo**

Industries Chimiques  
du Sénégal (ICS)  
Senegal



### BRAZIL

#### **Roger Downey**

Vale Fertilizantes  
Brazil



### EASTERN EUROPE AND CENTRAL ASIA

#### **Vladislav Baumgartner**

(resigned in December 2013)  
JSC Uralkali  
Russia



### HISPANO-AMERICA

#### **Daniel Pettarin**

Profertil S.A.  
Argentina



### WEST ASIA

#### **Khalifa Abdullah Al-Sowaidi**

(VP Designate)  
Qatar Fertiliser  
Company S.A.Q.  
(QAFCO)  
Qatar



### SOUTH ASIA

#### **Rakesh Kapur**

Indian Farmers  
Fertiliser Cooperative  
Ltd (IFFCO)  
India



### OCEANIA

#### **Tom O'Leary**

Wesfarmers/CSBP Ltd  
Australia



### CHINA

#### **Yang Yexin**

China Blue Chemical Ltd  
China



### EAST ASIA

#### **Cao Hoai Duong**

(VP Designate)  
Petrovietnam Fertilizer  
and Chemicals  
Company (PVFCCO)  
Viet Nam



### NORTH AMERICA

#### **Stephen R. Wilson**

(retired in December 2013)  
CF Industries, Inc.  
USA



### WESTERN AND CENTRAL EUROPE

#### **Renso Zwiers**

OCI Fertilizers  
Netherlands

# IFA AT A GLANCE

## VISION

The efficient and responsible production, distribution and use of plant nutrients play a vital role in achieving global food security and sustainable development.

## MISSION

As the only international association for the global fertilizer industry, IFA promotes the industry through its research and outreach initiatives.

### STATISTICS & MARKET INTELLIGENCE

Authoritative, comprehensive information about the industry and fertilizer markets is the basis of robust competition on the open market, trade and appropriate policies.

The information provided through IFA's statistics and analyses are critical for the industry and policymakers alike.

### BUSINESS NETWORKING

Peer-to-peer contacts remain fundamentally important for the industry's business operations and robust competition. Networking also facilitates the exchange of best practices to drive improved performance.

IFA provides open forums for networking and the exchange of knowledge and expertise.

### INTERNATIONAL ENGAGEMENT

International institutions and initiatives address issues that can directly or indirectly pertain to fertilizer production, distribution and use.

IFA engages with relevant agricultural, scientific and policy fora and stakeholders to gain insight into diverse viewpoints and to share the industry's perspectives.

### BENCHMARKING & BEST PRACTICES

Continuous improvement is critical for the sustainable production, distribution and use of fertilizers.

IFA is uniquely placed to promote best practices throughout the fertilizer value chain and to foster improvement in the industry's own performance through benchmarking.

## APPROACH

IFA provides a framework for collaboration within the fertilizer value chain on areas of common interest, platforms to discuss the complex issues facing the sector today and a structure for agreeing common positions and joint actions.

# PRODUCTION AND INTERNATIONAL TRADE COMMITTEE



**CHAIRMAN**

**Feng Zhibin**

Sinofert Holdings Ltd  
China



**VICE CHAIRMAN**

**Javier Goñi Del Cacho**

Fertiberia S.A.  
Spain



**CONVENOR OF THE PHOSPHATE WORKING PARTY**

**Michael Rahm**

The Mosaic Company  
USA



**CONVENOR OF THE POTASH WORKING PARTY**

**Jafar Salem**

Arab Potash Company Ltd  
Jordan



**CONVENOR OF THE NPK TASKFORCE**

**Dag Tore Mo**

Yara International ASA  
Norway

## THE PIT STATISTICAL PROGRAMME

In 2013, the Committee produced close to 50 reports on 17 fertilizers, intermediates and raw materials, including market outlook reports on medium-term and short-term supply and trade prospects. Eight global capacity surveys were completed in 2013, including updates on SSP, AN/CAN and feed phosphates. PITDATA, the new database management system for the PIT statistical programme, was under trial during 2013 and will be fully operational in 2014, with functions allowing IFA members to retrieve PIT statistical reports of the past ten years and activate selected searches for specific data on production and trade by product, country and year.

## SUPPLY-RELATED KNOWLEDGE

The annual Production and International Trade Conference remains the key IFA event focusing on emerging supply, global trade trends and capacity developments. The 2013 PIT Conference in Kiev in early October emphasized on developments in key fertilizer markets, emerging supply and logistics issues, and in the Ukrainian fertilizer market and natural gas supply in Europe.

The PIT Committee continued to be solicited for factual information on the status of global phosphate reserves and depletion rates. The PIT Service actively participated in reviewing documentation from the GTraps initiative. A consultation of IFA members involved in GTraps was carried out in early February 2013 in order to assess IFA's role and gather members' input on this initiative, with plans to convey an informal round table meeting in late March 2014 to inform IFA members on current global and regional initiatives related to phosphorus sustainability issues.

## COMMITTEE GOVERNANCE

Following recommendations made at the annual meeting of the PIT Committee in Kiev (October 2013), a new task force will be established in early 2014 with the mandate to revisit the PIT Committee's mission, core tasks and structure. Recommendations of the task force will be discussed in Sydney, with implementation planned by late September 2014 following approval by PIT members at the annual meeting of the Committee in Beijing.

The PIT Service has led Secretariat activities on the revisions of IFA anti-trust compliance policy, in order to ensure that current guidelines reflect evolving regulations and cross-cutting IFA activities. The PIT Service revamped its internal directive for handling confidential company statistics to take into account anti-trust considerations and security aspects.

# AGRICULTURE COMMITTEE



CHAIRMAN

**Jørgen Ole Haslestad**

Yara International  
ASA

Norway



VICE CHAIRMAN

**Rajiv Sinha**

DCM Shriram Ltd

India



CONVENOR OF THE  
WORKING GROUP ON  
FERTILIZER DEMAND  
FORECASTS

**Doug Hoadley**

CF Industries

USA

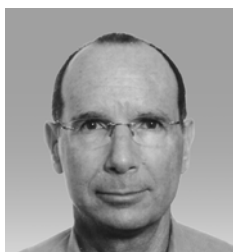


CONVENOR OF THE  
WORKING GROUP ON  
SPECIAL PRODUCTS

**Giuseppe Natale**

Valagro

Italy



CONVENOR OF THE TASK  
FORCE ON NUTRIENT  
STEWARDSHIP

**Hillel Magen**

International Potash  
Institute (IPI)

Switzerland



CONVENOR OF THE TASK  
FORCE ON LONG-TERM  
FERTILIZER DEMAND  
SCENARIOS

**Michael Rahm**

The Mosaic Company

USA

## NUTRIENT STEWARDSHIP INITIATIVES

The IFA Executive Committee has identified nutrient stewardship as a priority topic for our Association. The Committee has launched a series of country seminars on sustainable fertilizer management. The first seminar, which took place in September in Beijing, gathered 180 high-level government officials, fertilizer industry representatives and scientists with an interest in fertilizer use in China. Key findings identified during the event are expected to help Chinese stakeholders improve the environmental, economic and social performance of fertilizer use in their country.

The Agriculture Committee also established a task force in Chicago with the mandate of creating an inventory of nutrient stewardship initiatives. In view of the many developments pertaining to nutrient management in the context of the post-2015 development agenda, the task force has been increasingly involved in policy matters, including the debate on nutrient use efficiency targets, which emerged in a number of influential fora such as the Sustainable Development Solutions Network (SDSN), the Global Partnership on Nutrient Management (GPNM) and the International Nitrogen Initiative (INI).

## FERTILIZER USE

In August, the Secretariat released its third assessment of fertilizer use by crop at the global level. This update relates to the 2010-2010/11 campaign, and analyses 27 countries and 13 crop groups. In total, the assessment covers 94 percent of world fertilizer consumption. It provides a picture of the contribution of the different crop groups to world fertilizer consumption and a unique basis for market and scientific analysis.

Nitrogen and phosphorus are increasingly subject to scrutiny and policy debate. 2013 was a very intense year from that point of view, with major global conferences on phosphorus (co-organized by GPNM and Global TraPs in June in Beijing) and on nitrogen (organized by INI in November in Kampala, Uganda). IFA and its members were actively involved in these events in order to highlight progress achieved by the industry towards sustainable fertilizer supply and use of its products, and to contribute to the debate on common objectives. Consistent with IFA's strategic priority to better understand the policy environment surrounding fertilizer use, in 2013 the Secretariat increased its focus on fertilizer subsidies. A half-day panel session at the Crossroads Asia-Pacific conference was entirely dedicated to this topic, with particular attention to large Asian markets.



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# TECHNICAL AND SHE COMMITTEE



**CHAIRMAN**

**Jim Prokopanko**

The Mosaic Company  
USA



**VICE CHAIRMAN & CONVENOR OF THE WORKING GROUP ON PRODUCTION TECHNOLOGY**

**Brent Heimann**

PotashCorp  
USA



**CONVENOR OF THE WORKING GROUP ON SAFETY, HEALTH AND ENVIRONMENT (SHE)**

**K.K. Kaul**

DCM Shriram Consolidated Ltd. (DSCL)  
India



**CONVENOR OF THE WORKING GROUP ON CONFERENCES AND TRAINING**

**Fadhel Al-Ansari**

Gulf Petrochemical Industries Co. (GPIC)  
Bahrain



**CONVENOR OF THE WORKING GROUPS ON METHOD HARMONIZATION AND PRODUCT SECURITY**

**Jan Chys**

Yara S.A.  
Belgium



**CONVENOR OF THE WORKING GROUP ON NORM**

**Brian Birky**

USF Polytechnic - Florida Industrial and Phosphate Research (FIPR) Institute  
USA

## SHARING BEST PRACTICES

2013 was marked by a number of firsts, as the Technical Committee undertook a wide range of new initiatives on behalf of members in a number of key production and Safety, Health and Environment (SHE)-related management areas.

The Committee combined its biennial Global Technical Symposium with the Global Safety Summit and held its 2013 conference in Santiago, Chile. This flagship event showcased the diversity of technical and safety issues at the operational level that the fertilizer industry successfully manages year in and year out.

A special event was organized in Istanbul, Turkey, around the topic of naturally occurring radioactive material (NORM), highlighting the challenges and new opportunities for the fertilizer sector in this area.

## PROMOTING SAFETY AND SECURITY



**protect&sustain**  
IFA'S PRODUCT STEWARDSHIP INITIATIVE

IFA's Protect & Sustain initiative, now three years old, saw a growing number of certifications around the world as the programme's exposure continued to increase. Moreover, the incoming Technical Committee Chairman, Jim Prokopanko, established product stewardship as one of the team's top priorities. While this de facto global fertilizer standard is voluntary, it provides an opportunity for IFA members to show their commitment to reach a higher level of safety, security and sustainability.

Created at the beginning of the year, the Product Security task force emerged as a "virtual expert network" for addressing security-related issues in the industry. Leaders taking part in this network, composed of industry, governmental and non-governmental partners, met regularly during the year to discuss concrete steps to establish rigorous standards and increase awareness broadly, including through making specific recommendations for the industry and its partners.

The Committee conducted the 10th edition of its global Employee Safety Survey, which uses Lost Time Injuries Rate (LTIR) and Total Recordable Injuries (TRI) as the key metric for developing global safety performance benchmarks. To build upon these long-standing measurements, the Committee launched a global survey evaluating Employee Safety Perceptions in cooperation with the United States National Safety Council. This landmark survey and its leading indicators help member companies to better identify, anticipate and prepare for potential safety hazards in fertilizer production.

The Committee's new name, the Technical & SHE Committee, adopted at the end of 2013, better represents the dual nature of this team's actions today.

# COMMUNICATIONS AND PUBLIC AFFAIRS

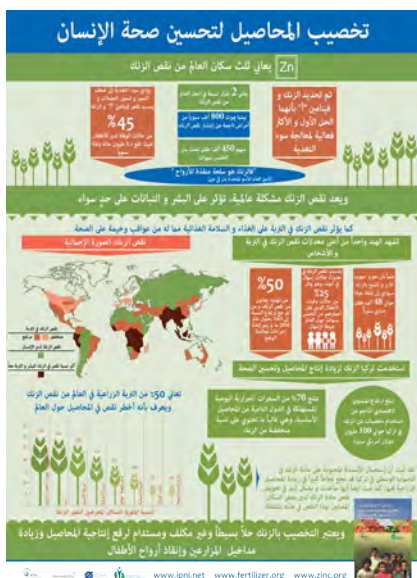
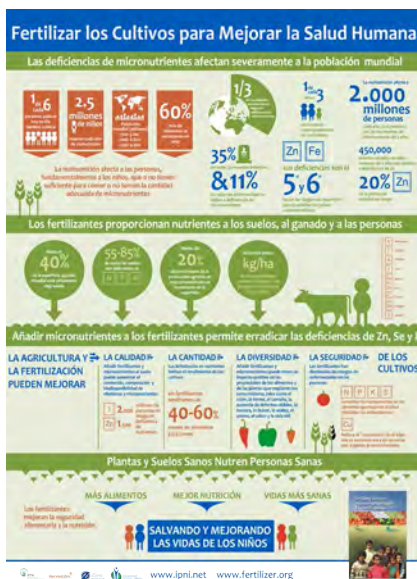


**CONVENOR**  
**Doug Beaver**  
Agrium Inc.  
Canada

## FERTILIZING CROPS TO IMPROVE HUMAN HEALTH CAMPAIGN

IFA, IPNI, IZA and Sabanci University carried out a year-long campaign focusing on the role of micronutrients in fighting malnutrition, following publication of the scientific review jointly edited by IFA and IPNI. The campaign centered on four infographics highlighting: micronutrients' role in agriculture and in human nutrition; micronutrient fertilization to fight micronutrient deficiencies; case studies from various countries; and a particular focus on zinc fertilization. To increase the reach of the campaign, IFA members provided valuable translation services. The executive summary of the review and infographics are now available in five languages and can all be downloaded from [fertilizer.org](http://fertilizer.org).

IFA hosted two high-level side events on the same subject at the OECD in Paris during a workshop on the role of business in greening the agricultural sector, and at the FAO in Rome during the annual session of the UN Committee on Food Security. Both events were well attended by national permanent delegations and influential staff members of international organizations. IFA's President, Esin Mete, was the ambassador for this project and authored a number of articles and blog posts, including in *The Economist Insights* and *Global Food Security*. The campaign culminated with the selection of Ms. Mete as keynote speaker on malnutrition for the 2014 *The Economist Feeding the World* conference and 2014 World Food Prize.



## OUTREACH ACTIVITIES TO THE UNITED NATIONS ON SUSTAINABLE DEVELOPMENT GOALS

IFA focused its international advocacy activities on the post-2015 development agenda and Sustainable Development Goals (SDGs). This project was led by a task force within IFA's Communicators' Network. The group developed an industry-wide position paper on the subject and organized two outreach missions to the United Nations in New York:

**UN Global Compact:** The first mission took place in September and brought five IFA members, who were also members of the Global Compact, to New York to attend the Leaders' Summit, Private Sector Forum, and bilateral meetings with several country delegations.

**Open Working Group on the Sustainable Development Goals:** The second mission in November brought 15 IFA members to New York. The programme covered the official sessions of the technical working group on the SDGs, negotiations of the Second Committee finalizing a report on food security and nutrition, and bilateral meetings at embassies and with key UN staff. Over 20 meetings took place in only three days.



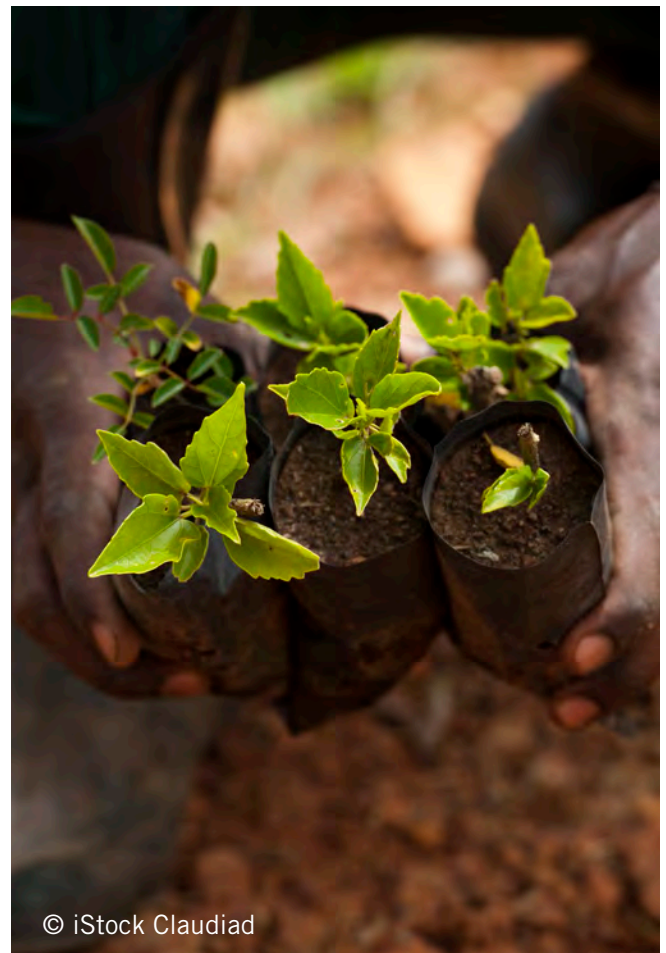
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# 12 SHE PRINCIPLES

**IFA HAS A SET OF GUIDING PRINCIPLES FOR SAFETY, HEALTH AND ENVIRONMENTAL (SHE) MANAGEMENT. THESE TWELVE PRINCIPLES EMBODY THE MEMBERSHIP'S COMMITMENT TO RESPONSIBLE AND SUSTAINABLE FERTILIZER PRODUCTION AND USE.**

1. **All members shall** demonstrate leadership and management commitment with regards to safety, security, health and environmental issues in fertilizer production, distribution and sales.
2. **All members shall** strive for zero harm and adverse environmental impact whilst maintaining a healthy work place for all employees and contractual staff.
3. **All members shall** ensure that safety, security, health and environment issues are integrated into their corporate policy and receive the utmost importance and priority.
4. **All members shall** ensure adequate financial and human resources for continual improvement of safety, security, health and the environment performance.
5. **All members shall** comply with local safety, security, health and environmental laws and strive to embrace international laws and best practices as much as possible.
6. **All members shall** establish and improve their safety, security, health and environmental performance through annual objectives, targets or key performance indicators.
7. **All members shall** establish adequate procedures and controls to ensure that safety, security, health and environment are not jeopardized at any time or in any form.
8. **All members shall** ensure that all employees and contractual staff have the right competence and are adequately trained and informed about safety, security, health and environment related to their specific activities, and shall encourage the participation of employees and contractual staff for further improvements.
9. **All members shall** adhere to the principles of hazard and risk assessment in evaluating all their activities to ensure that safety, security, health and environment standards are continually enhanced.
10. **All members shall** strive to subscribe to safety, security, health and environment management systems that will be subjected to internal and external auditing.
11. **All members shall** voluntarily share information with regards to experiences and lessons related to safety, health and the environment with all employees and contractual staff, and with other IFA members, unless under legal constraints or if the information is of proprietary nature.
12. **All members shall** strive to continually promote safety, security, health and environmental matters to enhance the social responsibility and accountability of the global fertilizer industry.



# AWARDS

## 2013 IFA NORMAN BORLAUG AWARD

The recipient of the 2013 IFA Norman Borlaug Award for excellence in crop nutrition research is Dr. Abdul Rashid of Pakistan.

Dr. Rashid is a highly accomplished crop nutritionist and a distinguished soil fertility expert. Among his many outstanding contributions are the identification, establishment and correction of field-scale boron deficiency on 2 million hectares of flooded rice fields and 3 million hectares of cotton grown on calcareous soils in Pakistan. His career has largely been defined by his work on micronutrients, soil testing and plant analysis, which has provided the basis for rational use of fertilizers in Pakistan and many other developing countries.

His research-based technologies have been promoted effectively through field demonstrations in collaboration with the fertilizer industry, as well as through local-language brochures and magazine articles. His monograph *Soil Science* consolidates contemporary knowledge on soil properties and processes. It has proved a superb textbook in Pakistan. Dr. Rashid's persistent research and development activities and convincing advocacy have created a "pull force" for the use of micronutrient fertilizers in his country. Through the HarvestZinc Fertilizer Project, he is contributing to combating micronutrient malnutrition through staple cereal biofortification.

Dr. Rashid has been editor-in-chief of the journal of the Pakistan Academy of Sciences and has served on the editorial board of the *European Journal of Agronomy and Communications in Soil Science and Plant Analysis*.

## 2013 IFA GREEN LEAF AWARD

Every two years, IFA recognizes Safety, Health and Environmental (SHE) excellence in the membership with its prestigious Green Leaf Award. In the case of the 2013 award, qualification was directly linked to participation in IFA's Protect & Sustain Product Stewardship Certification Programme. Despite more rigorous submission requirements, the Secretariat received a steady amount of submissions from its producer members located around the world. Judging by an independent panel was highly competitive.

The Qatar Fertilizer Company (QAFCO) was unanimously selected by the judges. The first and second runners-up were Tata Chemicals Ltd. (India) and Profertil (Argentina). During the award ceremony at the Global Safety Summit & Technical Symposium in Santiago, Chile, the outgoing IFA President and CEO of PotashCorp, William J. Doyle, told participants: "It is my belief that our people are the industry's highest priority. This is why I have made safety the prime focus of my work, not only in my own company but also in my leadership in the Association. We all need to make sure that every colleague should exit our locations in the same healthy way they entered them at the beginning of their working day."



© Abdul Rashid



Qatar Fertilizer Company, Green Leaf Award winner



Tata Chemicals Ltd, 1st runner-up



Profertil S.A., 2nd runner-up

# REGIONAL INITIATIVES

## AFRICA FORUM

IFA's Africa Strategy for the next five years was adopted in Chicago in 2013, consisting of two elements:

- Enhancing both the quality and country coverage of Sub-Saharan African fertilizer consumption statistics is a priority for IFA and its regional partners. In this connection, IFA has reallocated its long-standing support to IFDC's West Africa project towards the statistical component of AfricaFertilizer.org. Moreover, to help speed up the process, the Africa Forum has established a task force composed of representatives of the main fertilizer suppliers in Sub-Saharan Africa.
- The African Fertilizer and Agribusiness Partnership (AFAP) and IFA have agreed to partner in establishing the African Fertilizer Volunteers Program (AFVP). The program, to be officially launched at the beginning of 2014, is a call for global fertilizer industry experts to volunteer their time to build the African fertilizer value chain in order to increase fertilizer use on the continent.

## CHINA INITIATIVE

IFA's China Forward Strategy for 2012-2016 aims at nurturing strategic linkages with Chinese policy-makers and stakeholders, and enhancing contacts between Chinese and other IFA members. The main outcomes in 2013 were:

- Creation of a national consultative mechanism for IFA in China: The IFA China Consultative Group (CCG) was established under the leadership of Mr. Yang Yexin, IFA Regional Vice-President for China, with six prominent IFA member companies. The CCG met in early 2013 to suggest key IFA activities in China and share insights on China's national issues and policies.
- Organization of the IFA/CPCIF (China Petroleum and Chemical Industry Federation)/ChinaBlue Chemical Ltd (CBC) China Seminar on Sustainable Fertilizer Management on 16-17 September in Beijing. More than 250 participants attended the seminar, where many Chinese and non-Chinese experts shared their experience with sustainable agriculture. The key message was the need to improve the efficiency of nutrient application in China while reducing environmental impacts.
- Signing of a Memorandum of Understanding between the IFA Secretariat and CPCIF/Chinese fertilizer industry associations: The scope of this MOU is to expand communication between IFA and Chinese industry associations and facilitate the exchange of information and statistics.



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## EASTERN EUROPE AND CENTRAL ASIA (EECA) INITIATIVE

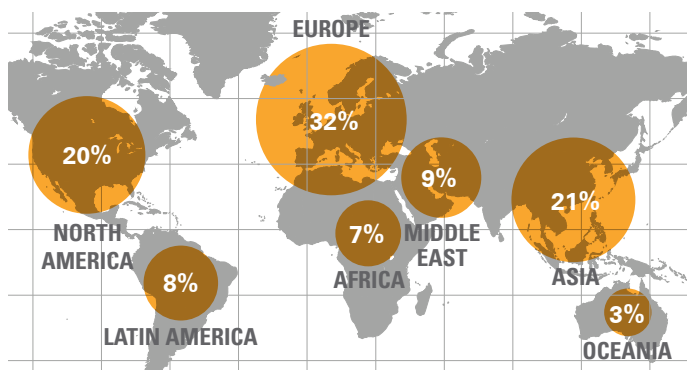
IFA continued its outreach activities to existing and potential members in the Eastern Europe and Central Asia (EECA) region, building on the momentum established in previous years. Most notably, the Production and International Trade (PIT) Conference was held in Kiev, Ukraine, focusing on key topics impacting global fertilizer trade and markets, while the Agriculture Committee held a Demand Forecasting workshop in Moscow, Russia. In addition, an increasing number of regional members participated in global working groups during the year, demonstrating increased engagement overall in the Association's activities.

The Secretariat continued to provide regional companies with member-related and market publications in the Russian language, in cooperation with specific member companies and organizations such as the International Plant Nutrition Institute (IPNI), to provide greater access to global fertilizer information and knowledge.

# IFA EVENTS

IFA events offer year round valuable opportunities for the fertilizer industry to share information on the driving forces influencing the industry's operating environment and highlight opportunities for industry action. Serving as a platform for strategic discussions on opportunities and challenges facing the international industry, the IFA conference programme brings together industry specialists and decision makers, facilitating global networking within the industry and widening members' knowledge of technologies and markets for fertilizers, their intermediates and raw materials.

## PARTICIPATION BY REGION



## LEADERSHIP IN CONTACT

The two statutory meetings of the Association are important milestones for the industry leadership. The 81st Annual Conference held in Chicago, USA, in May was attended by 1438 participants from 72 countries representing 433 companies and 9 international organizations. Convened in Paris, France early December, the 39th Enlarged Council Meeting featured Thomas Hager, author of the *Alchemy of Air*, with a keynote address on the tremendous discovery of synthetic nitrogen and its powerful impact on agricultural productivity and food security.

COUNTRY	SPONSOR
AUSTRIA	Borealis AG
BELARUS	JSC Belarusian Potash Company
CANADA	Hatch Agrium Inc.
CHILE	SQM
GERMANY	BASF SE
INDONESIA	APPI - Indonesian Fertilizer Producers' Association
UKRAINE	Ostchem Holdings Ltd
UNITED STATES	CF Industries, Inc. Gavilon Fertilizer, LLC Intrepid Potash Inc. International Raw Materials Ltd Koch Fertilizer, LLC PotashCorp J.R. Simplot Co., AgriBusiness The Mosaic Company Trammo Inc. Yara North America Inc. CHS Inc ArrMaz Custom Chemicals

## SPECIALIST PLATFORM

The Technical Committee combined its Safety Summit and Technical Symposium into one event which was held in Santiago, Chile from 8 to 12 April 2013. This event's overriding theme was 'Responsible fertilizer production: blending SHE management excellence and technical expertise.'

The IFA Production and International Trade Conference, highly rated as a knowledge-exchange gathering, was held in Kiev, Ukraine from 7 to 9 October 2013. A full slate of speakers shared expertise on fertilizer market trends, natural gas supply, fertilizer capacity developments, and trade prospects. Two main perspectives emerged: convergence of global natural prices and polarization of supply sources; and, reality checks on shale gas and on potash solution mining.

The 2013 IFA Crossroads Asia-Pacific Conference took place in Bali, Indonesia from 6 to 8 November 2013. The sessions embraced a wide range of issues including fertilizer subsidies, agricultural and food security situation in Asia-Pacific, evolution of fertilizer-related policies and how it impacts the fertilizer industry as well as an outlook for regional fertilizer demand and supply. A workshop was also devoted to nutrient stewardship initiatives in Asia-Pacific.

The kind support of member companies and associations was key to the successful implementation of the 2014 IFA events programme.

ATTENDANCE AT IFA CONFERENCES	PARTICIPANTS*	COUNTRIES
IFA 2013 GLOBAL SAFETY SUMMIT & TECHNICAL SYMPOSIUM 8-12 APRIL 2013 - SANTIAGO, CHILE	122	27
81ST IFA ANNUAL CONFERENCE 20-22 MAY 2013 - CHICAGO, UNITES STATES	1423	72
IFA PRODUCTION AND INTERNATIONAL TRADE CONFERENCE 7-9 OCTOBER 2013 - KIEV, UKRAINE	98	24
IFA 2013 CROSSROADS ASIA-PACIFIC 6-8 NOVEMBER 2013 - BALI, INDONESIA	349	39
39TH IFA ENLARGED COUNCIL MEETING 4-5 DECEMBER 2013 - PARIS, FRANCE	102	34

\* Total number of delegates and accompanying persons

## FINANCE

The year 2013 ended with a surplus after taxation of about € 351,600, against some € 14,800 in 2012. This difference was mostly due to an increase in operating income combined with a decrease in operating expenditure. Despite lower revenue in the financial activity and an increase in corporate tax, the final result in 2013 was significantly higher than in 2012.

In regard to operating income, the total of € 8.23 million was higher than in 2012 (€ 7.55 million), representing an increase of 9.1 per cent. Revenue from subscriptions was roughly at the level of 2012, with a total of € 5.09 million against € 5.06 million the previous year. Income from conferences and meetings was about 27 per cent above 2012. This positive result was essentially due to higher attendance at the Annual Conference in Chicago and at the Asia-Pacific Crossroads Conference in Bali, compared to the same events in Doha and in Manila in 2012. Revenue from the Enlarged Council Meeting in Paris was higher than from the one in Rome in 2012 on account of income from sponsorship. On the other hand, revenue from the Global Safety Summit and Technical Symposium in Santiago, and the PIT Conference in Kiev, was lower than from the events in Tashkent and in Dublin the previous year.

Operating expenditure amounted to € 7.88 million, against € 8.06 million in 2012, representing a decrease of about 2.2 per cent. The most important changes in 2013 resulted from savings made in several budgets, including expenditure for external consultancies; travel, accommodation and hospitality; and the fertilizer development programme. The reduction in external consultancy fees was mostly due to a decrease in fees linked to the development of the second phase of the Conference Service software implementation. Savings made in travel, accommodation and hospitality essentially concerned the budget of the Director's General Office. In 2012, it took into account the travelling duties of the outgoing Director General, who retired in December 2012, as well as the expenditure of his successor for a four-month period. Finally, the amount involved in the fertilizer development programme was lower than in 2012 due to management performing an evaluation of the projects to be financed by the Association before engaging in committed expenditure. The decrease in expenditure is also explained by the fact that in 2013 no amount was registered in a supplementary defined benefit pension scheme. This pension scheme was liquidated in December 2012 on account of the retirement of the senior executive staff member who benefited from this contract.

Contrasting with these decreases, the most important increase resulted from the organizational costs of conferences and meetings, which were higher than in the previous year. All events organized in 2013 were more expensive than in 2012, with the exception of the Enlarged Council Meeting held in Paris.

Referring to financial activity, the year ended with a surplus of some € 174,200 against about € 541,300 in 2012. This reduction was essentially due to the change in fair value of investments, which amounted to about € 11,000, whereas some € 326,000 was registered in the 2012 accounts. Contrasting with the situation in the previous year, the financial markets in 2013 remained relatively stable throughout the year. In addition, in 2013 two portfolios which were at maturity date and with guaranteed capital were liquidated and replaced by two other instruments with protected capital. Finally, at the end of December 2013 the market value of two investments, compared to their market situation in December 2012, showed some underlying capital gains. However, two other instruments presented some unrealized losses almost at the same level. As a result, the difference between underlying gains and losses on these portfolios at 31 December 2013 led to a positive outcome of about € 15,000. This lower performance mostly explains the decrease in change in fair value of investments for 2013.

With regard to the corporate tax, the deferred tax calculation made in compliance with UK accounting standards resulted in a tax charge of € 176,781, contrasting with the amount of € 9,627 registered in 2012.

Details of the Association's financial situation in 2013 are provided in the "Audited Accounts at 31 December 2013" attached to the Annual Report.



# ELECTIONS IN 2013

On the occasion of the 81st Annual Conference, the Annual General Meeting on 22 May elected the following officers to their respective posts:

## PRESIDENT OF IFA

### **Esin Mete**

Chairwoman, Toros Agri Industry and Trade Co. Inc., Turkey

## IMMEDIATE PAST PRESIDENT

### **William J. Doyle**

President and CEO, PotashCorp, Canada

## VICE PRESIDENT, SUSTAINABLE DEVELOPMENT

### **Abdulrahman Jawahery**

President, GPIC - Gulf Petrochemical Industries Co., Bahrain

## VICE PRESIDENT, MEMBER OF THE EXECUTIVE MANAGEMENT GROUP

### **Arifin Tasrif**

President Director, P.T. Pupuk Indonesia (Persero) Holding Company, Indonesia

## VICE PRESIDENT FOR WESTERN & CENTRAL EUROPE

### **Renso Zwiers**

Chief Executive Officer, OCI Fertilizers, Netherlands

## VICE PRESIDENT FOR AFRICA AND CHAIRMAN AFRICA FORUM

### **Alassane Diallo**

Directeur Général, ICS - Industries Chimiques du Sénégal

## VICE PRESIDENT FOR OCEANIA

### **Tom O'Leary**

Vice President, Wesfarmers/CSBP Ltd, Australia

## VICE PRESIDENT FOR SOUTH ASIA

### **Rakesh Kapur**

Joint Managing Director, IFFCO - Indian Farmers Fertiliser Cooperative Ltd, India

## VICE PRESIDENT FOR NORTH AMERICA

### **Stephen R. Wilson**

(retired in December 2013)

President and CEO, CF Industries, Inc., United States

## VICE PRESIDENT FOR BRAZIL

### **Roger Downey**

Diretor Presidente, Vale Fertilizantes S.A., Brazil

The proposal to discontinue the **Vice Presidency for Innovation and Research** was approved.

The following officers were also appointed by the Council on 22 May:

## CHAIRMAN OF FINANCE COMMITTEE

### **Mostafa Terrab**

CEO, OCP S.A., Morocco

## CHAIRMAN OF THE AGRICULTURE COMMITTEE

### **Jørgen Ole Haslestad**

President & CEO, Yara International ASA, Norway

## CHAIRMAN OF THE TECHNICAL COMMITTEE

### **Jim Prokopanko**

President & CEO, The Mosaic Company, United States

At its meeting on 5 December in Paris, the Council designated **Cao Hoai Duong**, President & CEO, Petrovietnam Fertilizer and Chemicals Company (PVFCCO), Vietnam Vice President for East Asia.

Also, following the departure of **F. Al-Sheabi**, **K. Al-Sowaidi**, Chief Executive Officer, QAFCO - Qatar Fertiliser Company S.A.Q., Qatar was designated Vice President for West Asia. Both would be officially elected by the Annual General Meeting in May 2014.



## PAST ANNUAL CONFERENCES

2013	Chicago	1985	Munich	1957	Scheveningen
2012	Doha	1984	Mexico City	1956	London
2011	Montreal	1983	Vienna	1955	Hamburg
2010	Paris	1982	Palma de Mallorca	1954	Lisbon
2009	Shanghai	1981	Singapore	1953	Stockholm
2008	Vienna	1980	Monte Carlo	1952	Cannes
2007	Istanbul	1979	Rio de Janeiro	1951	Lucerne
2006	Cape Town	1978	Cannes	1950	Madrid
2005	Kuala Lumpur	1977	Copenhagen	1949	Copenhagen
2004	Marrakech	1976	London	1948	Brussels
2003	Philadelphia	1975	San Francisco	1947	Eastbourne
2002	Lisbon	1974	Tenerife	1946	Paris
2001	Sydney	1973	Rome	1940 to 1945	no conferences
2000	Oslo	1972	Deauville	1939	The Hague
1999	Manila	1971	Amsterdam	1938	Rome
1998	Toronto	1970	Athens	1937	Paris
1997	Beijing	1969	Burgenstock / Lucerne	1936	Budapest
1996	Berlin	1968	Berlin	1935	Gleneagles
1995	Singapore	1967	Monte Carlo	1934	Lisbon
1994	Istanbul	1966	Miami Beach	1933	Paris
1993	New Orleans	1965	Lisbon	1932	Copenhagen
1992	Seoul	1964	m/v Cabo San Roque	1931	Baden-Baden
1991	London	1963	Lausanne	1930	Interlaken
1990	Vancouver	1962	Vienna	1929	Vienna
1989	Budapest	1961	Casablanca	1928	Stockholm
1988	Monte Carlo	1960	Venice	1927	Hamburg
1987	Orlando	1959	Biarritz		
1986	Bangkok	1958	Copenhagen		

## PAST PRESIDENTS

B. Doyle	2011-13	W. Klaassen	1989-91	G.M. Mason	1965-69
A.S. Shriram	2009-11	G.P. Giusti	1987-89	J. Capelo Portabella	1962-65
T. Enger	2007-09	A.B. Al-Nouri	1985-87	H. Stevenius-Nielsen	1959-62
S. Wu	2005-07	K.H. Tillmann	1983-85	R. Grandgeorge	1956-59
J.M. Van Brunt	2003-05	J. Miro Chavarria	1981-83	D.J. Bird	1953-56
W. Puggina	2001-03	G. Artaud	1979-81	R. Standaert	1949-53
E. Tirkkonen	1999-2001	P. Latteur	1977-79	A. Waller	1946-49
U.S. Awasthi	1997-99	W.J. Turbeville, Jr.	1975-77	E. Berr	1937-39
C.E. Childers	1995-97	A. Robinson	1973-75	E.G. Martens	1927-37
E. Öner	1993-95	R. Mathieu	1971-73		
B.B. Turner	1991-93	J.D. Waller	1969-71		



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