

# IFA ANNUAL REPORT 2014



International  
Fertilizer Industry  
Association

IFA ANNUAL REPORT **2014**


REGISTERED IN ENGLAND: N° 718 812

Registered Office: Confederation House,  
East of England Showground, Peterborough,  
Cambridgeshire PE 2 6XE, United Kingdom



# CONTENTS

From the President	03
From the Director General	04
Membership	06
Executive Board & Board of IFA	08
IFA at a Glance	10
Production and International Trade Committee	11
Agriculture Committee	12
Technical and SHE Committee	13
Communications and Public Affairs	14
2014 IFA Norman Borlaug Award	15
12 SHE Principles	16
Regional Initiatives	17
IFA Events	18
Finance	19
IFA Secretariat	21
Elections in 2014	22
Past Annual Conferences/Past Presidents	23
Reports and Accounts	25



"AFRICA IS THE WORLD'S FASTEST GROWING REGION IN TERMS OF FERTILIZER USE. IN VIEW OF ITS DEMOGRAPHIC GROWTH AND ARABLE LAND POTENTIAL, THE CONTINENT IS DESTINED TO BE AN IMPORTANT FERTILIZER MARKET IN THE FUTURE."

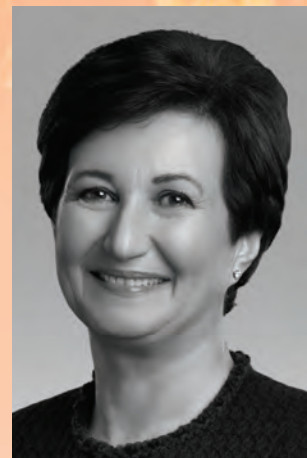
# FROM THE PRESIDENT

The fertilizer industry is often criticized for not making its products more readily available to smallholder farmers – particularly in Africa, where application rates are the lowest in the world. However, it can be easy to lose sight of the complexity of the problem of smallholders' access to fertilizers. In 2014 the United Nations launched the International Year of Family Farming, which focused specifically on Africa, in order to respond to such criticism and address the structural problems that impede the development of fertilizer markets in Africa.

Africa is the world's fastest growing region in terms of fertilizer use. In view of its demographic growth and arable land potential, the continent is destined to be an important fertilizer market in the future. Africa has the world's highest rates of soil degradation. Its soils have been mined over decades, indeed centuries, and are in urgent need of replenishment. Along with our seven partners involved in agricultural development in Africa, IFA strives to demonstrate that realizing the potential of Africa's agricultural sector will require the mobilization of African governments and donor countries to implement coherent policy measures.

Another key area of work for the Association is nutrient stewardship. IFA carried out many activities this year in connection to this issue, including a seminar on nutrient management in Indonesia, the development of a position paper on nutrient use efficiency in the context of the negotiations at the United Nations on the Sustainable Development Goals, and outreach to many of the organizations involved with nutrients in the science and policy fields. I encourage our members to become involved in these important campaigns and in regional outreach and issue-related activities.

The UN General Assembly has declared 2015 the International Year of Soils, with the aim of increasing awareness and understanding of the importance of soil for food security and essential ecosystem functions. Because soils are a key resource wherever our products are used. IFA will be promoting the International Year of Soils and the important role of fertilizers in maintaining and improving soil health.



**Esin Mete**

PRESIDENT

A handwritten signature in black ink, which appears to read 'Esin Mete'. The signature is fluid and cursive.

# FROM THE DIRECTOR GENERAL

Whereas the Millennium Development Goal to halve the proportion of people living in extreme poverty was met five years before the target year of 2015, and the goal of halving the proportion of people suffering from hunger by this year is within reach, some 1.2 billion people still live in extreme poverty.

A great deal of work therefore remains to be done. Our industry is committed to do its part: fertilizers must continue to play a role in increasing agricultural productivity in order to feed the world's growing population and to increase livelihoods in rural areas, where most people who live in extreme poverty are found.

It was heartening to see from the results of a 2014 survey of global policymakers, carried out on behalf of IFA, that the fertilizer industry is recognized for its collaborative approach to food security. Indeed, this is an industry that believes in partnerships with farmers, research organizations, governments, NGOs and other players in the food and agricultural value chain to solve the complex problems which lead to there being an unacceptable number of poor and hungry people in the world.

Partnerships are also crucial to ensure sustainable agricultural systems; while fertilizers play such an important role in food security, they must be used effectively and efficiently in order to minimize nutrient losses to the environment.

The same survey results showed that although some policymakers appear to confuse our products with crop protection and biotechnology products, many respondents do understand that fertilizers – organic and mineral – provide important nutrients to crops and are crucial drivers of agricultural productivity.

With the adoption of new Articles of Association and Byelaws at our May 2014 annual meeting in Sydney, IFA members finalized a two-year strategic review and put in place a streamlined governance system. I would like to express my gratitude to the IFA members who served on two task forces to shepherd through this not always easy process. We hope these new statutory documents will serve our geographically diverse membership (which includes fertilizer producers and other players from the fertilizer value chain, as well as service providers to the industry) well over the years ahead!



**Charlotte  
Hebebrand**

DIRECTOR GENERAL

A handwritten signature in black ink, which appears to read 'Charlotte Hebebrand'. The signature is fluid and cursive.

“WHILE FERTILIZERS PLAY SUCH AN IMPORTANT  
ROLE IN FOOD SECURITY, THEY MUST BE  
USED EFFECTIVELY AND EFFICIENTLY IN  
ORDER TO MINIMIZE NUTRIENT LOSSES TO  
THE ENVIRONMENT.”



# MEMBERSHIP

AT THE END OF 2014, THE NUMBER OF MEMBERS OF THE ASSOCIATION REACHED 540 COVERING 80 COUNTRIES. THE VARIOUS CATEGORIES OF MEMBERSHIP WERE REPRESENTED AS FOLLOWS:

**191**

ORDINARY MEMBERS

**76**

AFFILIATE MEMBERS

**233**

ASSOCIATE MEMBERS

**40**

CORRESPONDENT MEMBERS

WITH THE ADOPTION OF NEW ARTICLES OF ASSOCIATION IN MAY 2014, MEMBER CATEGORIES HAVE BEEN REDEFINED (SEE ARTICLE 7). CONSEQUENTLY, A NUMBER OF MEMBER COMPANIES HAVE BEEN SHIFTED FROM THE AFFILIATE TO THE ASSOCIATE CATEGORY AND FROM THE ASSOCIATE TO THE ORDINARY CATEGORY. THE TOTAL NUMBER OF MEMBERS ALSO TAKES INTO ACCOUNT THE 13 SUBSCRIPTION DEFAULTERS WHOSE MEMBERSHIP HAD TO BE CANCELLED.

## DURING 2014, 30 NEW MEMBERS WERE ELECTED AS FOLLOWS:

### ORDINARY MEMBERS

- Hebei Monband Water Soluble Fertilizer Co. Ltd (China P.R.)
- Kunming Chuanjin Luo Chemical Co. Ltd (China P.R.)
- Yantai Ruimei Fertilizer Co. Ltd (China P.R.)
- Yunnan Xiangfeng Chemical Fertilizer Co. Ltd (China P.R.)
- Behn Meyer Agricare (M) Sdn Bhd (Malaysia)
- PPC ADOB Sp. z.o.o. Sp.k. (Poland)
- Nyrstar Sales & Marketing AG (Switzerland)
- Tunisian Indian Fertilizers – TIFERT (Tunisia)

### AFFILIATE MEMBERS

- Rothamsted Research (United Kingdom)
- One Acre Fund (United States)

### CORRESPONDENT MEMBERS

- Bernard Drocourt (France)
- Michel Le Rigoleur (France)
- Clifford Love (United States)

### ASSOCIATE MEMBERS

- Radiance International (Australia)
- B&A Minerçao S/A (Brazil)
- Campo Rico Fertilizantes (Brazil)
- Western Potash Corp. (Canada)
- Allied Harvest Company Limited (China P.R.)
- CECA (France)
- RHEWUM GmbH (Germany)
- Dangote Fertiliser Limited (Nigeria)
- Muscat Fertilizer Company LLC (Oman)
- Silmar Marine Agency (Russia)
- Tong Tek Pte Ltd (Singapore)
- Profercy (Spain)
- Bunge S.A. (Switzerland)
- Fertrade DMCC (U.A.E.)
- Kalyaan Resources DMCC (U.A.E.)
- Macquarie Capital (Europe) Limited (United Kingdom)
- Alcoa inc. (United States)



## THERE WERE 20 RESIGNATIONS DURING THE YEAR:

### ORDINARY MEMBERS

- Sichuan Chemical Industrial Holding Group (SCIHG) (China P.R.)
- Indo Gulf Fertilisers (A unit of Aditya Birla Nuvo Ltd) (India)
- National Fertilizers Ltd (India)
- S.C. Azomures S.A. (Romania)
- Profert (Pty) Ltd (South Africa)

### AFFILIATE MEMBERS

- Agua Resources Ltd (Brazil)
- Atacama Minerals Chile, S.C.M. (a subsidiary of Sirocco Mining Inc.) (Chile)
- Pythagoras Investment Management, LLC (United States)

## NAME CHANGES:

### ORDINARY MEMBERS

- Shandong Kingenta Ecological Engineering Co. Ltd (China P.R.) has become Kingenta Ecological Engineering Group Co. Ltd
- DCM Shriram Consolidated Ltd (India) has changed its name to DCM Shriram Ltd.

### AFFILIATE MEMBERS

- Arianne Resources Inc. (Canada) has become Arianne Phosphate Inc.
- The Fertilizer Society of South Africa (FSSA) has become The Fertilizer Association of Southern Africa (FertASA)

## OTHER CHANGES:

### ORDINARY MEMBERS

- The membership of Borealis Agrolinz Melamine GmbH (Austria) is now under Borealis AG
- The membership of Orascom Construction Industries (Egypt) has been transferred to OCI Fertilizers (The Netherlands).
- The group membership of Chambal Fertilisers and Chemicals Limited, Paradeep Phosphates Ltd and Zuari Agro Chemicals Ltd (India) will be changed to individual membership for each of these companies.
- Following the resignation of National Fertilizers Ltd (India), Rashtriya Chemicals and Fertilizer Ltd (India) will remain a member in its own right.
- Great Salt Lake Minerals (United States) has transferred its membership to its parent company Compass Minerals, including Bill Quill Resources in Canada.

### ASSOCIATE MEMBERS

- Interore S.A. (Belgium)
- HATCH (Canada)
- Kindly(Beijing) Tech Trading Co., Ltd (China P.R.)
- Biofert Ltd (Cyprus)
- Sineria Industries Ltd (Cyprus)
- Maersk Line (Denmark)
- Agrifert (France)
- Solvadis Commodity Chemicals GmbH (Germany)
- Stolt Tankers and Terminals (The Netherlands)
- Saudi Industrial Export Co. (Saudi Arabia)
- KBR (United States)

### CORRESPONDENT MEMBERS

- V. Wellington (Australia)

### ASSOCIATE MEMBERS

- Tortuga Cia Zootechnica Agraria (Brazil) has become DSM Produtos Nutricionais Brasil S/A
- Young-Inh Trade Corporation (China P.R.) has become Young-Inh Corporation
- ArrMaz Custom Chemicals (United States) has become ArrMaz
- Lewis Pumps (United States) has become Weir Minerals Lewis Pumps
- Nitron International Corporation (United States) has become Nitron Group

### ASSOCIATE MEMBERS

- Sirius Minerals Pty (Australia) has transferred its membership to Sirius Minerals Plc (United Kingdom).
- DNV Certification BV Belgium Branch had resigned but after due consideration has decided to continue its membership.
- The membership of Getax Australia Pty Ltd has been transferred to Getax Agrifert DMCC in Dubai.
- In future, the membership of Ameropa Düngemittel GmbH (Germany) will fall under the membership of its parent company Ameropa AG, already an Associate member of IFA.
- iTrade Fertilisers SA (Switzerland) has transferred its membership to a new company called iTrade Ferts SA.

### CORRESPONDENT MEMBER

- Kevin Moran (United Kingdom) works now as Chief Technology Officer at Kingenta Ecological Engineering Group Co. Ltd (China P.R.) and no longer qualifies for Correspondent membership.

# EXECUTIVE BOARD & BOARD OF IFA

MAY 2014 - MAY 2015

## EXECUTIVE BOARD



PRESIDENT

**Esin Mete**

Toros Agri Industry  
and Trade Co. Inc.  
TURKEY



VICE PRESIDENT

**Eugenio Ponce**

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



EXECUTIVE BOARD MEMBER

**Abdulrahman  
Jawahery**

Gulf Petrochemical  
Industries Co. (GPIC)  
BAHRAIN



CHAIRMAN FINANCE  
COMMITTEE

**Mostafa Terrab**

OCP  
MOROCCO



EXECUTIVE BOARD MEMBER

**Arifin Tasrif**

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



DIRECTOR GENERAL

**Charlotte  
Hebebrand**

IFA  
FRANCE

## BOARD OF IFA

### AFRICA



**Alassane Diallo**

Industries Chimiques  
du Sénégal (ICS)  
SENEGAL



**Saad Abou  
El Maaty**

Abu-Qir Fertilizers &  
Chemical Ind. Co.  
EGYPT

### EAST ASIA



**Cao Hoai Duong**

Petrovietnam Fertilizer  
and Chemicals  
Company (PVFCCO)  
VIET NAM



**Yexin Yang**

China Blue Chemical Ltd  
CHINA



**Wang Hongjun**

Sinofert Holdings Ltd  
CHINA P.R.



**Arifin Tasrif**

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

## EASTERN EUROPE & CENTRAL ASIA



**Andrey Guryev**  
OJSC PhosAgro  
RUSSIA



**Dmitry Konyaev**  
UralChem OJSC  
RUSSIA

## LATIN AMERICA



**Roger Downey**  
Vale Fertilizantes  
BRAZIL

## OCEANIA



**Tom O'Leary**  
Wesfarmers Chemicals,  
Energy & Fertilisers  
AUSTRALIA



**James Whiteside**  
Incitec Pivot  
AUSTRALIA



**Daniel Pettarin**  
Profertil S.A.  
ARGENTINA

## NORTH AMERICA



**Jim Prokopanko**  
The Mosaic Company  
UNITED STATES



**Chuck Magro**  
Agrium Inc.  
CANADA



**Anthony Will**  
CF Industries, Inc.  
UNITED STATES

## SOUTH ASIA



**Rakesh Kapur**  
Indian Farmers  
Fertiliser Cooperative  
Ltd (IFFCO)  
INDIA



**Kapil Mehan**  
Zuari Agro Chemicals Ltd  
INDIA



**Naeem Khalid Lodhi**  
Fauji Fertilizer Company  
Ltd  
PAKISTAN

## WESTERN & CENTRAL EUROPE



**Renso Zwiens**  
OCI Fertilizers  
NETHERLANDS



**Javier Goñi Del Cacho**  
Fertiberia S.A.  
SPAIN



**Pawel Jarczewski**  
Grupa Azoty S.A  
POLAND

## WEST ASIA



**Khalifa Abdullah Al-Sowaidi**  
Qatar Fertiliser Company  
S.A.Q. (QAFCO)  
QATAR



**Stefan Borgas**  
ICL  
ISRAEL

# 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

**Rakesh Kapur**

IFFCO  
INDIA

The PIT Committee was restructured in 2014, with the objective of focusing on key tasks, cross-cutting activities and initiatives along the supply-value chain. The PIT Service published 70 statistical reports on 18 fertilizers, intermediates and raw materials during the year. Key activities in 2014 included an update of the global capacity survey on ammonium sulphate and the first-ever global capacity report on NPK compounds. Regional capacity information by product has been added on the IFA website.



VICE CHAIRMAN

**Javier Goñi Del Cacho**

Fertiberia S.A.  
SPAIN

More attention was given to Africa and China in 2014, with contributions to the Sub-Saharan Africa Statistics Task Force and data exchanges with Chinese fertilizer associations under the scope of the newly formed China Statistics Task Force. New emphasis was also given to monitoring measures that affect global fertilizer trade.



CONVENOR OF THE PHOSPHATE WORKING PARTY

**Michael Rahm**

The Mosaic Company  
USA

The PIT Service participated in several industry events and engaged with the FAO, UNEP, IEA and the OECD on fertilizer statistics and issues related to fertilizer feedstock security of supply. In March the PIT Committee coordinated a roundtable meeting on Sustainable Phosphate Management for IFA members. Panelists presented a holistic view on P sustainability along the whole value chain and took stock of the various global and regional initiatives on P sustainability.

The 35th IFA Production and International Trade Conference was held in Beijing in September. There was a strong emphasis on fertilizer-related policies, trade prospects and emerging markets. Issues concerning feedstock supply, and in particular, chronic shortfalls of natural gas supply to the nitrogen industry, are expected to be prominent in 2015.



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



CHAIRMAN  
**Jørgen Ole Haslestad**  
 Yara International ASA  
 NORWAY  
 (retired October 2014)



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  
 WORKING GROUP ON  
 NUTRIENT STEWARDSHIP  
**Hillel Magen**  
 International Potash  
 Institute (IPI)  
 SWITZERLAND



CONVENOR OF THE  
 WORKING GROUP ON  
 INNOVATION & RESEARCH  
**Pierre Herben**  
 Yara S.A.  
 BELGIUM

# AGRICULTURE COMMITTEE

In 2014 the Agriculture Committee focused on nutrient stewardship. To ensure a coordinated approach to the main issues, the Task Force on Nutrient Stewardship became a permanent working group and was enlarged to include communicators.

As a first task, the working group agreed on the basic principles of nutrient stewardship.

The environment in which the fertilizer industry operates is becoming increasingly political, with a growing emphasis on perceived threats related to fertilizer overuse and calls to set nutrient use efficiency targets. The working group developed a paper to contribute to the debate, defining key principles for addressing nutrient management performance. In addition, a discussion paper on the concept of “planetary boundaries” for N and P was produced to suggest options for industry’s response to this popular concept in scientific and policy arenas. IFA also actively defended its positions at the Global Partnership on Nutrient Management (GPNM) and the Sustainable Development Solutions Network (SDSN).

To meet the objective of promoting nutrient stewardship worldwide, in 2014 IFA co-organized its second country seminar on sustainable fertilizer management. This seminar took place in Jakarta with the strong support of the Indonesian industry.

Together with its partners – the International Water Management Institute (IWMI), IPNI and IPI – IFA finalized a comprehensive scientific review looking at water and fertilizer management for sustainable agricultural intensification. This book will provide a sound scientific basis for communicating on the topic in 2015.

Targeting a more lay audience, IFA issued two Fertilizer Facts addressing yield gaps, and nitrogen use efficiency trends in different parts of the world.



CHAIRMAN

**Jim Prokopanko**

The Mosaic Company  
USA



VICE CHAIRMAN & CONVENOR  
OF THE WORKING GROUP ON  
PRODUCTION TECHNOLOGY

**Brent Heimann**

Arab Potash Company Ltd  
JORDAN



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

**K.K. Kaul**

DCM Shriram Limited  
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

# TECHNICAL AND SHE COMMITTEE

2014 was a banner year for the industry's commitment to innovation and to continual improvement in fertilizer production. The Technical and SHE Committee undertook a number of new initiatives on behalf of the global membership. The Committee's new and ongoing initiatives span a broad range of activities, including organization of global knowledge-sharing events, coordination of global publications, stakeholder outreach, global benchmarking and SHE promotion, as well as increased product stewardship certification and the creation of a product security "virtual expert network".

One of the highlights during the year was completion of the Association's seventh biennial Environmental Performance Benchmarking survey. The results of this vast survey demonstrate that the global industry is continuing its sustained improvement on numerous fronts, including reducing greenhouse gases and eliminating effluent emissions to air, water and soil. Benchmarks for emissions of greenhouse gases (namely CO<sub>2</sub> and N<sub>2</sub>O) have been lowered across all product sectors. In many respects these promising results, along with the strong participation rate, indicate a broad commitment throughout the global industry to environmental mitigation strategies.

In 2014 there was also record-breaking attendance at the Committee's biennial Global Technical Symposium in Amsterdam. Over 170 technology leaders, and 32 expert speakers from 91 companies and 35 countries, came together to discuss the status of fertilizer innovation in the global sector. Participants noted the high quality and the innovation aspects of the technical presentations, as well as the lively debates that ensued – all of which contributed to a truly world-class event.

Another highlight of the past year was the finalization of two major recommendations by the Association's Working Group on Sampling and Method Analysis Harmonization. These new global publications contain guidelines for determining moisture content in fertilizer shipments, and recommended procedures for determining total P<sub>2</sub>O<sub>5</sub> content in complex fertilizers.

# COMMUNICATIONS AND PUBLIC AFFAIRS



CONVENOR  
**Doug BEEVER**  
Agrium Inc.  
CANADA

IFA's year-long communications campaign, "Smallholders' Access to Fertilizers in Africa", coincided with the United Nations' International Year of Family Farming and the African Union's Year of Food Security and Agriculture in Africa. IFA's campaign was promoted by eight partner organizations (AFAP, AGRA, CNFA, IITA, IPI, IFDC and One Acre Fund) and synergies were created across institutions, networks and continents. The Smallholders campaign was launched at the African Union Summit in Malabo, Equatorial Guinea, with a letter issued to heads of state calling for action to improve smallholders' livelihoods through six concrete measures. A video animation was then launched during the African Green Revolution Forum in Addis Ababa, Ethiopia. The video produced a tremendous echo over social media channels, reaching over half a million people via Twitter on the launch day alone.



In 2014 IFA conducted a reputational analysis with the communications firm APCO Worldwide. The survey, which consulted 400 policy makers and influencers in over ten countries, drew the following conclusions:

- Stakeholders tend to confuse fertilizers with other agricultural inputs.
- Safety and environmental stewardship are essential drivers of the industry's reputation.
- The fertilizer industry is not seen as the sole champion for food security, so the industry's most important reputational asset is working in partnership to develop innovative practices

The lessons from the analysis will inform IFA's new communications strategy in 2015.

2014 also marked an expansion of IFA's stakeholder engagement strategy. The FAO, OECD and UNEP were targeted during the year. Outreach missions with IFA members took place in Nairobi (UNEP), New York (UN headquarters) and Rome (FAO). IFA's key messages focused on the role of agriculture and food security in achieving the Sustainable Development Goals (SDGs). Finally, the Communications and Public Affairs service increased its online and digital media presence, reaching a record number of followers on Twitter (6000), LinkedIn (3000) and Pinterest (75).





# 2014 IFA NORMAN BORLAUG AWARD



Dr. Xuhua Zhong is the 2014 IFA Norman Borlaug Award laureate for excellence in crop nutrition knowledge transfer. Dr. Zhong, a crop physiologist, has been recognized for his exemplary extension work on nitrogen use efficiency. This recognition is particularly relevant given the Chinese context, in which improving the efficiency of nitrogen use has come to the forefront on the sustainable development agenda.

Since the early 1990s low nitrogen use efficiency has been a problem for rice production in China, resulting in high production costs, low yields, low profits for farmers and negative environmental impacts. Dr. Zhong, who had been working on rice nutrient management, developed the “three controls” technology: control of N fertilizer input, control of unproductive tillers, and control of pest and diseases. With this technology farmers’ practice nitrogen recovery efficiency increased from less than 30 to 40 percent.

Dr. Zhong has developed numerous innovative materials and tools to make his extension work easier for farmers to take up. The “three controls” technology is web-based. It is also available in the form of leaflets, CDs and videos, which are widely used and distributed in many farmer training courses in the provinces, counties, towns and villages.

The new technology has been officially recommended to rice farmers by the Ministry of Agriculture of China. It is now one of the most widely adopted rice-growing technologies in the country.

Dr. Zhong is currently the head of the Crop Physiology and Ecology Laboratory at the Rice Research Institute, Guangdong Academy of Agricultural Sciences. He obtained his Ph.D in plant physiology from South China Institute of Botany, Chinese Academy of Sciences.



# 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.



# IFA REGIONAL INITIATIVES

## AFRICA FORUM

In addition to the communication campaign on smallholders' access to fertilizers, IFA's activities related to Africa focused on better understanding regional fertilizer consumption and on building the capacity of the regional fertilizer value chain.

At the Strategic Forum in Marrakech, Morocco, in November, an entire session was dedicated to Sub-Saharan Africa, looking at regional perspectives. On this occasion IFA released a new set of Sub-Saharan African fertilizer consumption statistics, which will serve as new baseline for the region. Data show that Sub-Saharan Africa (without South Africa) is currently the fastest growing market, with an average growth rate of 8 percent per year since 2008.

In February IFA and the African Fertilizer and Agribusiness Partnership (AFAP) launched the Africa Fertilizer Volunteers Program (AFVP), which invites the industry and partners to share skills with African entrepreneurs in order to help build a vibrant fertilizer value chain south of the Sahara.

## EASTERN EUROPE AND CENTRAL ASIA OUTREACH

In 2014, IFA's Director General and the Technical and SHE Committee Director led an outreach delegation to Moscow to meet with chief executives of the major producer members in the EECA region. These meetings have led to increased collaboration in a number of areas, in particular shoring up support for the organization of future events like the IFA's Annual Conference in Moscow 2016, as well as the commitment of increased senior-level support for Committee working groups and initiatives. The Association's sustained focus on outreach in this region has allowed the development of more tailored services for EECA member companies. It has also greatly reduced language and cultural barriers to participation by individual executives from the region.

## ASIA OUTREACH

**China initiative** - In September 2014, IFA facilitated the organization of a fertilizer policy roundtable meeting with the CEOs of prominent Chinese IFA member companies, academia and Chinese policy-makers in Beijing, under the auspice of the Chinese Petroleum and Chemicals Federation. The objective of this meeting was to engage with Chinese policy-makers for promoting nutrient best management practices and fostering implementation of the nutrient stewardship in China. Strong interest was expressed in specialty fertilizers, education, and training of farmers, as well as IFA's perspectives on the UN's Sustainable Development Goals.

**Viet Nam outreach** - In October 2014, IFA and PetroVietnam Fertilizers and Chemicals organized an outreach seminar in Ho Chi Ming City and coordinated a series of meetings with industry and policy-makers, with the objectives of reinforcing linkage with existing members, identifying potential members, and assessing interest in future IFA activities and services.



# IFA EVENTS

IFA events provide year-round opportunities to share information on factors influencing the fertilizer industry's operating environment, and to highlight opportunities for industry action. As a platform for the presentation of committee activities, the IFA conference programme brings together industry specialists and decision makers – facilitating global networking within the industry, and increasing members' knowledge of technologies and markets for fertilizers, their intermediates and raw materials.

## LEADERSHIP CONTACTS

The two general meetings of the Association are of particular importance for the industry's leadership. The 82nd Annual Conference in Sydney, Australia, in May was attended by 1158 people from 72 countries, representing 405 companies and nine international organizations. The first IFA Strategic Forum, convened in Marrakech, Morocco, in November, engaged IFA members in more strategic discussions on key issues facing the industry, such as links with the rest of the agri-food value chain, the evolving fertilizer market in Sub-Saharan Africa, and how best to position the industry with respect to the United Nations and initiatives such as the Sustainable Development Goals and the International Year of Soils (IYS). Future industry leaders (aged 35 and under) benefited for the first time from a 50 percent discount on the registration fee to encourage their participation under IFA's newly constituted Future Fertilizer Leaders Program.

## SPECIALIST PLATFORM

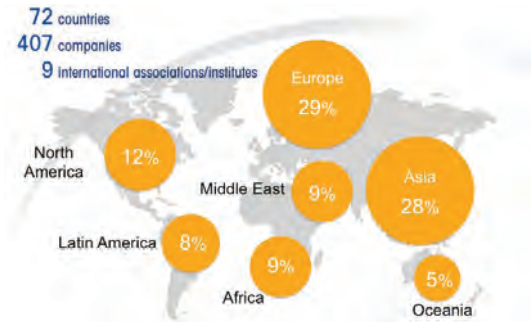
The Technical and SHE Committee, in partnership with IFA's Working Group on Innovation & Research, organized the Global Technical Symposium held in Amsterdam, the Netherlands, on 1-3 April 2014. This event's theme "Fertilizer Technology Perspectives: Innovation on the Horizon", attracted over 150 technology leaders from 35 countries. Best practices were shared, including new production processes and more efficient utilization. Participants were invited to take part in a technical site visit. They could choose between Yara's nitrogen production facility in Sluiskil, to discover its innovative WarmCO2 (Green Security) project, and the PK/NPK production facility of ICL Fertilizers Europe in Amsterdam.

The IFA Production and International Trade Conference, highly appreciated as a means of promoting knowledge exchange, was held in Beijing, China, on 29 and 30 September. Industry representatives, government officials and participants from academia shared knowledge and addressed emerging industry challenges. Sustainability and seasonality were dominating themes throughout the conference. The substantive programme highlighted increasing environmental and structural challenges in China; global trade trends and seasonality; and emerging sales opportunities in South Asia and in a few key niche markets.

The IFA Crossroads Asia-Pacific Conference took place in Singapore on 28-30 October. There were a record 400 registrants. The keynote address by Bijay Singh (Punjab Agricultural University, Ludhiana, India) kick started IFA's focus on the role of soils prior to the official start of the FAO's IYS in 2015. There were also very interactive sessions on safety and product stewardship and on specialty fertilizers.

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

## PARTICIPATION BY REGION



COUNTRY	SPONSOR
AUSTRALIA	Incitec Pivot Fertilisers Wesfarmers Chemicals Energy & Fertilisers
BAHRAIN	GPIC - Gulf Petrochemical Industries Co.
BELGIUM	Fertilizers Europe Prayon Rosier
BRAZIL	NAQ Global Companies
CHINA P.R.	China BlueChemical Ltd CNAMPGC Hubei Yihua Chemical Industry Co. Ltd Kingenta Sdic Xinjiang Luobupo Potash Co. Ltd Sinofert Holdings Ltd Trammo (Shanghai) Trading Co. Ltd
RUSSIA	Uralchem Uralkali
SAUDI ARABIA	Ma'aden
SINGAPORE	Ameropa Asia Pte Ltd Phosagro Asia Pte Ltd
THE NETHERLANDS	ICL Fertilizers Europe OCI Fertilizers Stamicarbon
UNITED STATES	International Raw Materials Ltd
VIET NAM	Petrovietnam Fertilizer and Chemicals Company (PVFCCO)
MOROCCO	OCP

ATTENDANCE AT IFA CONFERENCES	PARTICIPANTS	COUNTRIES
2014 IFA GLOBAL TECHNICAL SYMPOSIUM 1-3 APRIL 2014 - AMSTERDAM, THE NETHERLANDS	157	35
82ND IFA ANNUAL CONFERENCE 26-28 MAY 2014 - SYDNEY, AUSTRALIA	1148	72
2014 IFA PRODUCTION & INTERNATIONAL TRADE CONFERENCE 29-30 SEPTEMBER 2014 - BEIJING, CHINA P.R.	128	30
IFA 2014 CROSSROADS ASIA-PACIFIC 28-30 OCTOBER 2014 - SINGAPORE	397	43
IFA STRATEGIC FORUM 19-20 NOVEMBER 2014 - MARRAKECH, MOROCCO	145	38

\*Total number of delegates and accompanying persons

# FINANCE

IFA had an operating income in 2014 of € 8.39 million, which was slightly higher than in 2013 (€ 8.24 million), representing an increase of about 1.9 percent. Income from subscriptions was higher than the previous year due to a 5 percent increase in subscription rates in compliance with the IFA policy of adjusting its dues every two years. On the other hand, income from conferences and meetings was lower than in 2013, mainly on account of a fewer number of participants at the Annual Conference in Sydney compared to Chicago in May 2013. However, this decrease was partly offset by higher attendance at the other events organized in 2014 compared to the year before. Finally, income from sponsorship increased significantly, representing almost 18 percent of the income from conferences and meetings.

Operating expenditure reached some € 7.96 million, against € 7.88 million in 2013, a slight increase of less than 1 percent. The most important changes in 2014 resulted from an increase in several areas of expenditure, including staff costs, external consultancy fees, and the expenses of the Sustainable Fertilizer Partnership Programme (previously called the Fertilizer Development Programme). As regards staff costs, the increase was mostly due to the fact that the amount of salaries and social charges reallocated under separately disclosed expenses heading for conferences and meetings was significantly lower than in 2013. Referring to external consultancy fees, additional expenditure included the fees of a communication agency, which carried out a global reputational analysis and message development. This study, which started in December 2013, carried on into 2014, explaining the extra fees paid in that year.

Moreover, the new governance system approved in Sydney in May 2014 resulted in changes to the Articles and Bye-Laws of the Association, which created additional costs. The assistance of a legal advisor was also requested regarding the project to assess the impact of potential closure of the UK Headquarters and the creation of a new IFA Office in Paris. Turning to the Sustainable Fertilizer Partnership Programme, a larger number of projects was financed in 2014 than in 2013, including contributions made to support the UN's International Year of Soils and One Acre Fund, a non-governmental organization. In addition, a donation to support the United Nations' response to the Ebola outbreak, which had devastating consequences for the food and agricultural sectors in the affected countries by Ebola, was made during the year.

Some savings were also made compared to the previous year, including in organizational costs for conferences and meetings, which were significantly lower than in 2013; expenditure on printing, subscriptions and stationery; and study tours and international award expenses.

Referring to financial activity, a surplus of € 253,055 was recorded in the accounts, against € 174,212 in 2013. This situation was mainly due to the change in fair value of investments, which amounted to about € 89,000 at the end of the year, against some € 11,000 in 2013. Income from investments was at about the same level as in 2013.

With regard to the corporate tax, the deferred tax calculation made in compliance with UK accounting standards resulted in a tax charge of € 230,040, whereas € 176,781 was registered in 2013.

In summary, the year 2014 ended with a surplus after taxation of about € 455,500, against some € 351,600 in 2013. This positive difference was essentially due to an increase in operating income, combined with overall expenditure at about the same level as in 2013 and additional revenue from financial activity. The surplus has been added to the association's reserves.

Details of the Association's financial situation in 2014 are provided in the "Audited Accounts at 31 December 2014" attached to the Annual Report.





# IFA SECRETARIAT



## DIRECTOR GENERAL'S OFFICE

**01 - Charlotte Hebebrand**  
DIRECTOR GENERAL

**02 - Claire Boutaric**  
MANAGER MEMBER  
RELATIONS AND EXECUTIVE  
ASSISTANT TO THE DIRECTOR  
GENERAL

**03 - David François**  
IT MANAGER

**04 - Aline Bortot**  
IT ASSISTANT

## AGRICULTURE SERVICE

**05 - Patrick Heffer**  
SENIOR DIRECTOR

**06 - Olivier Rousseau**  
FERTILIZER DEMAND MARKET  
ANALYST

**07 - Sophie Palmié**  
ASSISTANT

## PRODUCTION AND INTERNATIONAL TRADE SERVICE

**08 - Michel Prud'homme**  
SENIOR DIRECTOR

**09 - José de Sousa**  
NITROGEN PRODUCTS  
MARKET ANALYST

**10 - Virginie Couturier**  
PHOSPHATE PRODUCTS  
MARKET ANALYST

**11 - Sylvie Marcel-Monnier**  
ASSISTANT

## TECHNICAL AND SHE SERVICE

**12 - Volker Andresen**  
DIRECTOR

**07 - Sophie Palmié**  
ASSISTANT

## COMMUNICATIONS AND PUBLIC AFFAIRS SERVICE

**13 - Morgane Danielou**  
DIRECTOR

**14 - Claudine Aholou-Pütz**  
COMMUNICATIONS  
SPECIALIST

**15 - Hélène Ginet**  
COMMUNICATIONS  
SPECIALIST

**16 - Maria Antip**  
POLICY ANALYST

**17 - Sophie Babeix**  
ASSISTANT

## CONFERENCE SERVICE

**18 - Stéphane Leleu**  
DIRECTOR

**19 - Valérie Corfmat**  
SENIOR ASSISTANT

**20 - Sandie Bouttemy**  
ASSISTANT

**21 - Jessica de Lafargue**  
ASSISTANT

## ADMINISTRATIVE SERVICE

**22 - Florence Lambert**  
DIRECTOR

**23 - Aurélien Palaric**  
SENIOR ACCOUNTANT

**24 - Sylvain Rivière**  
ACCOUNTANT

**25 - Christophe Andriam**  
CLERK



# ELECTIONS IN 2014

With the adoption of new Articles of Association and Byelaws on 28 May 2014 in Sydney, the Executive Management Group (EMG) was replaced by an Executive Board (composition remains unchanged).

Further, the Association is now managed by an Enlarged Board of Directors. The number of Board members per region is calculated according to that particular region's share of global fertilizer consumption and production, as well as its share of membership fees of IFA's total membership fees. Under the new governance system, China is part of the East Asia region and Latin America includes Brazil and the former Hispano-America.

In addition to the former officers of Association (previously known as Executive Committee members), new Board members were elected at the General Meeting on 28 May 2014:

<b>AFRICA</b>	SAAD ABOU EL MAATY, ABU QIR, EGYPT
<b>EAST ASIA</b>	CAO HOAI DUONG, PVFCCO, VIETNAM WANG HONGJUN, SINO FERT, CHINA P.R. ARIFIN TASRIF, PT PUPUK INDONESIA
<b>EASTERN EUROPE &amp; CENTRAL ASIA</b>	ANDREY GURYEV, PHOSAGRO, RUSSIA DMITRY KONYAEV, URALCHEM, RUSSIA
<b>NORTH AMERICA</b>	CHUCK MAGRO, AGRIUM, CANADA ANTHONY WILL, CF INDUSTRIES, UNITED STATES
<b>SOUTH ASIA</b>	KAPIL MEHAN, ZUARI AGRO CHEMICALS LTD, INDIA NAEEM KHALID LODHI, FAUJI FERTILIZER CY, PAKISTAN
<b>WEST ASIA</b>	KHALIFA ABDULLAH AL-SOWAIDI, QAFCO, QATAR STEFAN BORGAS, ICL, ISRAEL
<b>WESTERN &amp; CENTRAL EUROPE</b>	PAWEL JARCZEWSKI, GRUPA AZOTY, POLAND

Also on 28 May 2014, Chairs of the following Thematic Committees were appointed by the Board:

- Production and International Trade Committee: Rakesh Kapur, IFFCO, India
- Newly established Communications & Public Affairs Committee: Chuck Magro, Agrium, Canada (effective on 1 January 2015)

At its meeting on 20 November 2014 in Marrakech, the General Meeting elected following Board members:

- Oceania: James Whiteside, Incitec Pivot, Australia.
- Western and Central Europe: Javier Goñi, Fertiberia, Spain, following the retirement of Jørgen Haslestad.
- Chair of the Agriculture Committee: With the departure of Jørgen Haslestad, this post was vacant and the Board appointed Kapil Mehan, Board member representing South Asia, to succeed him.





# PAST ANNUAL CONFERENCES

2014	Sydney	1986	Bangkok	1958	Copenhagen
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		

# 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. Lateur	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		



**International  
Fertilizer Industry  
Association**

International Fertilizer Industry Association  
28 rue Marbeuf, 75008 Paris, France  
Tel: +33 1 53 93 05 00 | Fax: +33 1 53 93 05 45/47  
ifa@fertilizer.org | www.fertilizer.org

Design by Elfie Pariente