



**ifa**  
INTERNATIONAL  
FERTILIZER ASSOCIATION

# ANNUAL REPORT 2018

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# FROM THE CHAIRMAN



Strategic reviews, such as the IFA2030 exercise which we finished in 2018, are important not just in terms of their outcomes (which you can read about in this report) but also in terms of their process. This is particularly true for an association as diverse and large as IFA, the only international fertilizer association, which has a membership of almost 500 entities from almost 70 countries. This year and a half long review presented us with the wonderful opportunity to jointly consider the future in a series of workshops held around the world, bringing larger and smaller companies together, producers and traders of many different types of fertilizer products, an array of technology providers, research organizations and other IFA members with an interest in plant nutrition. This diversity of players was further enlarged by the participation of external stakeholders who enriched the process. Given this wide diversity, it was heartening to witness the high level of engagement and dialogue of the many participants and the emerging consensus on key opportunities and challenges facing agri-food systems and plant nutrition in the run up to 2030 and beyond, even if not everyone saw eye to eye on every single topic. I am grateful to all the IFA members and our external partners for these thoughtful and lively exchanges, which have provided a new vitality and dynamism to our association.

**Rakesh Kapur**  
Chairman

A handwritten signature in black ink that reads "Rakesh Kapur". The signature is written in a cursive style and is underlined with a single horizontal stroke.

The logo for the IFA 2030 exercise. It features the word "ifa" in a blue, lowercase, sans-serif font. To its right is a stylized green plant icon with three leaves. Further right is the number "2030" in a grey, sans-serif font, where the "0" is partially enclosed by the plant icon.



# FROM THE DIRECTOR GENERAL



Most IFA members point to IFA statistics on fertilizer supply and demand as one of the most valued benefits of their membership within the association, since the data collected and disseminated by IFA can help to shape their planning and marketing strategy. Perhaps less known is that there are also many external stakeholders, including UN agencies and academic institutions who avail themselves of the (less detailed) statistics which are made available to non-members, providing important insights on changes over time in fertilizer production, trade and application, which also provide an insight into levels of agricultural productivity and food security around the world. IFA takes its role of providing our members with useful market intelligence, as well as providing this broader public good, extremely seriously.

Towards this end, IFA was proud to launch IFASTAT in 2018, which is a searchable database that integrates fertilizer supply and demand statistics and allows for a

much easier retrieval of data, which the association has been compiling over the past 45 years on the demand and 15 years on the supply side. IFASTAT is not a static database: a key priority for IFA, also following on the IFA2030 strategic review, is to further finesse its functionalities over the years to come in order to provide user friendly access to this wealth of information.

**Charlotte Hebebrand**

Director-General

A handwritten signature in black ink, which reads "Charlotte Hebebrand". The signature is fluid and cursive, matching the printed name above it.



# IFA2030

## *Digging deeper, thinking harder, planning further*

Based on an extensive scenario mapping exercise launched at the 2017 Annual Conference in Marrakesh, IFA undertook a far-reaching strategic review to help define the priority areas for IFA to support its members in the run up to 2030 and beyond.

Drawing upon the valuable and diverse input from IFA Members and distinguished experts gathered through surveys and workshops held around the world, and with the help of the IFA2030 Facilitator Margaret Flaherty, IFA prepared four Scenarios focusing on the most pressing issues facing the industry, to extend the industry's thinking and test its preparedness.

The IFA2030 Scenarios were presented to Members during the 2018 Annual Conference in Berlin and were released alongside a Toolkit to encourage companies to pursue similar internal long-term planning exercises.

The IFA2030 exercise concluded at the 2018 Strategic Forum in Beijing, with IFA's Board of Directors establishing key priorities for the association. Most importantly, the Board has tasked IFA with more prominently promoting industry stewardship and with engaging in more extensive stakeholder dialogues to promote sustainable plant nutrition solutions.

## THE IFA2030 SCENARIOS

The purpose of the four IFA2030 Scenarios is to better understand the dynamics of change facing the industry and to work out what the implications could be for business and its stakeholders. They are a back-drop to strategy discussions, helping companies think about what could be, not what has been.

## OUR SCENARIOS DESCRIPTION

### 1 READY, SET, GO!

A world with more sluggish agricultural production growth but with strong drivers for innovation is a scenario we call Ready, Set, Go! In this scenario, a slow-down of agricultural production growth for a variety of reasons would happen alongside a wide variety of innovations. These innovations would unleash new and different ways of doing business, interacting socially, and producing and consuming food. In this environment, successful fertilizer industry players will offer innovative plant nutrition solutions and products, as will a range of other solution providers.



### 2 NEW HORIZONS

A world with strong agricultural production growth and high external drivers for innovation is a scenario which we call New Horizons. A greater push for innovation will unleash strong competitive forces but the ongoing strong agricultural production growth may provide greater breathing room for commodity fertilizer producers.



### 3 COMMODITY CLASSIC

A world with strong agricultural production growth and lower rates of innovation is a scenario which we call Commodity Classic. It is the one that resembles the industry operating environment of recent decades. If this environment endures, the industry will remain mostly focused on producing commodity fertilizers and enjoy strong fertilizer demand growth. Whereas this scenario does not foresee strong external pressure to enhance nutrient use performance, environmental impacts linked to ongoing inefficiencies would be compounded.



### 4 REDUCED DYNAMISM

A world with sluggish agricultural production growth and lower rates of innovation is a scenario we call Reduced Dynamism as the demand growth for fertilizers decelerates while the industry, given weak drivers for innovation, will not embark on new products and approaches. It will largely remain focused on commodities and find itself trying to outcompete other fertilizer producers. In the absence of innovative approaches to enhance nutrient use performance, environmental impacts linked to ongoing inefficiencies will be compounded, even in the absence of high fertilizer demand growth.



## KEY INSIGHTS FROM THE IFA2030 SCENARIOS

Regardless of which Scenario or combination of Scenarios emerges, IFA identified the following issues having important implications across the sector in coming years:

#### ► INNOVATION / DISRUPTION

Innovation is a game changer in the industry, and disruption is already underway as new players enter the market, and innovative technologies and services hit the ground. Operational efficiency (plant, process and logistical) will remain key considerations. Customer orientation, customization and nimbleness will become vital enablers of success.

#### ► FARMERS/PARTNERS

Farmers' plant nutrition needs must be considered from a site and crop specific angle. The industry needs to be a champion for sound policy frameworks and investments to support the social, economic and environmental sustainability of farming. The industry needs to clearly position itself given the numerous sources of knowledge and inputs competing for farmers' attention.

#### ► FERTILIZER DEMAND SHIFTS

Improvements in nutrient use efficiency and increased recycling may lead to lower fertilizer demand, but also offer vast opportunities for balanced crop nutrition and innovative plant nutrition solutions. On the other hand, vastly underserved markets of today are becoming significant demand drivers both in terms of nutrient tons, and in terms of more customized fertilizer products and application solutions.

### ► REGULATIONS/PRESSURES

The regulatory landscape will explain with increased pressure on environmental stewardship, resource competition and protection, health, safety & security concerns, and greener and more eco-efficient farm systems, which will also impact fertilizer production, distribution and application.

### ► TRANSPARENCY/ACCOUNTABILITY

In the future, the fertilizer industry will face downstream requirements for more transparency and accountability (environment and health impacts, product traceability, safety and security).

### ► LICENSE TO OPERATE/REPUTATION

Despite the critical role fertilizers play in feeding the world and contributing to improving people's lives, they are not well-understood. In order to maintain its license to operate, innovate and grow, the industry needs to be seen as an integral part of the agriculture value chain, contributing to serving 20 billion meals per day today, and 30 billion in the year 2050.

## NEW STRATEGIC ORIENTATION

IFA's Board of Directors adopted several Resolutions during the Strategic Forum in Beijing in November 2018, based on key insights and implications provided by the IFA2030 scenarios, in particular to promote industry stewardship more prominently, and to pursue greater outreach and engagement with external stakeholders.

More specifically, with regard to industry stewardship, the Board resolved to:

- endorse IFA's SHE Principles and ask all IFA members (producing, trading and distributing fertilizers) to sign off on said Principles in 2019 for the duration of their membership in IFA;
- confer the status of "Industry Stewardship Champion" to any member (with operating assets) who has participated (at all sites) in IFA benchmarks and IFA's product stewardship certification program Protect & Sustain (or equivalent instruments);
- agree that after 2021, members considered industry stewardship champions are preferred for Board membership;
- approve that IFA reserve funds be made available to finance benchmarks during the 2019-2021 period (incentive for all members to participate in all IFA benchmarks offered during these three years);
- expand IFA's industry stewardship principles, benchmarks and certification programs (SHE) to also encompass nutrient stewardship;
- make participation in IFA industry stewardship programs a membership requirement for all IFA members in the run up to 2030.



# EXECUTIVE BOARD

May 2018- May 2019

## IFA CHAIRMAN



**Rakesh Kapur**  
IFFCO - Indian Farmers Fertiliser  
Cooperative (IFFCO) Ltd, India

## VICE CHAIRMAN



**Dr Mostafa Terrab**  
EXECUTIVE BOARD MEMBER  
OCP, Morocco

## EXECUTIVE BOARD MEMBER



**Svein Tore Holsether**  
Yara International ASA, Norway

## EXECUTIVE BOARD MEMBER AND CHAIRMAN OF THE COMMUNICATIONS & PUBLIC AFFAIRS COMMITTEE



**Dmitry Konyaev**  
UralChem OJSC, Russia

## IMMEDIATE PAST CHAIRMAN



**Dr. Abdulrahman Jawahery**  
GPIC - Bahrain (end of mandate :  
June 2018)

## EXECUTIVE BOARD MEMBER AND CHAIRMAN OF THE FINANCE COMMITTEE



**Chuck Magro**  
Nutrien, Canada

## EXECUTIVE BOARD MEMBER



**Zhai Jidong**  
Kingenta Ecological Engineering  
Group, China P.R.

## DIRECTOR GENERAL



**Charlotte Hebebrand**



# BOARD OF IFA

May 2018- May 2019

## AFRICA



**Saad Abou El Maaty**

Abu-Qir Fertilizers & Chemical Ind. Co., Egypt

(end of mandate : June 2018)



**Ashish Lakhotia**

ETG Inputs, Tanzania

(end of mandate : June 2018)



**William P. O'Neill**

International Raw Materials, United States



**Munish Jindal**

Indorama, Nigeria

## EAST ASIA



**Mulyono Prawiro**

P.T. Pupuk Sriwidjaja, Indonesia



**Akbar Md Thayoob**

CEO, Petronas Chemicals Marketing Sdn Bhd, Malaysia

(end of mandate : June 2018)



**Zhai Jidong**

**EXECUTIVE BOARD MEMBER**

Kingenta Ecological Engineering Group, China P.R.



**Liao Hui**

Kailin Group, China P.R.

(resigned October 2018)



**Takashi Sumi**

Atlas Fertilizer Corporation, Philippines

(resigned January 2019)



**Qin Hengde**

Sinofert Holdings, China P.R.

## EASTERN EUROPE & CENTRAL ASIA



**Andrey Guryev**

OJSC PhosAgro, Russia



**Dmitry Konyaev**

**CHAIRMAN COMMUNICATIONS & PUBLIC AFFAIRS COMMITTEE**

UralChem OJSC, Russia

## LATIN AMERICA



**Patricio De Solminihac**

SQM, Chile

(resigned November 2018)



**Daniel Pettarin**

Profertil, Argentina



**Marcos Stelzer**

CMOC, Brazil

## NORTH AMERICA



**Chuck Magro**  
**EXECUTIVE BOARD**  
**MEMBER & CHAIRMAN**  
**FINANCE COMMITTEE**  
Nutrien., Canada



**Tony Will**  
**CHAIRMAN PRODUCTION**  
**& INTERNATIONAL TRADE**  
**COMMITTEE COMMITTEE**  
CF Industries, Inc.,  
United States



**James "Joc"  
O'Rourke**  
The Mosaic Company,  
United States

## OCEANIA



**Ian Hansen**  
**CHAIRMAN AGRICULTURE**  
**COMMITTEE**  
Wesfarmers,  
Australia



**Jeanne Johns**  
Incitec Pivot Ltd,  
Australia

## SOUTH ASIA



**Rakesh Kapur**  
**IFA CHAIRMAN**  
IFFCO - Indian  
Farmers Fertiliser  
Cooperative (IFFCO)  
Ltd, India



**Tariq Khan**  
Fauji Fertilizer  
Company Ltd,  
Pakistan



**Manoj Mishra**  
National Fertilizers  
Limited, India

## WEST ASIA



**Brent Heimann**  
**CHAIRMAN TECHNICAL &**  
**SHE COMMITTEE**  
Arab Potash  
Company, Jordan  
(Resigned January 2019)



**Khalid Al Mudaifer**  
Ma'aden, Saudi  
Arabia  
(end of mandate : November  
2018)



**Samir Al  
Abdrabbuh**  
SABIC, Saudi  
Arabia

## WESTERN AND CENTRAL EUROPE



**Javier Goni del  
Cacho**  
Fertiberia, Spain  
(end of mandate : November  
2018)



**Sven Tore Holsether**  
**EXECUTIVE BOARD**  
**MEMBER**  
Yara International  
ASA, Norway



**Yves Caprara**  
Prayon S.A.,  
Belgium



**Alexa  
Hergenröther**  
K+S AG, Germany



Young Professionals IFA2030 Session, Berlin

# IFA'S 2018 ACHIEVEMENTS

## OUR 2018 HIGHLIGHTS:

- ▶ IFA completes major strategic IFA2030 review
- ▶ Market Intelligence at your fingertips - the launch of IFASTAT
- ▶ New and improved IFA website
- ▶ "Year of the Benchmark" - Record member participation in IFA benchmarks
- ▶ High attendance of IFA Conferences
- ▶ Successful nutrient stewardship seminars
- ▶ Strengthened engagement with UN Agencies: FAO, UNEP

## KEY OBJECTIVES

### **IFA BUILDS KNOWLEDGE, FACILITATES NETWORKING AND HELPS TO SHAPE STRATEGY**

#### ▶ IFA2030

IFA concluded its long-term strategic planning exercise IFA2030 in Beijing during the Strategic Forum in November.

Since its launch in 2017, the IFA2030 exercise successfully brought together IFA Members and external stakeholders to discuss the future of food systems and plant nutrition, and to think about implications for the fertilizer industry.

Drawing upon the results of online surveys and the outcomes of the dozen workshops organized all around the world, IFA developed four Scenarios to better understand





the dynamics of change facing the industry, extend thinking to alternative plausible futures, and test the industry's preparedness for them.

In addition, IFA also released a Facilitator's Guide and Toolkit to help Members conduct internal workshops similar to IFA2030 with their employees. IFA is pleased to note that several companies and associations conducted similar long-term planning exercises to IFA2030 in 2018.

In Beijing, the IFA Board of Directors took stock of the outcomes of IFA2030 and tasked the association to help IFA members position themselves as industry stewardship champions and to engage in more concerted outreach and engagement of the industry's many stakeholders.

The year ended with a very successful external communications campaign around IFA2030, which ran on IFA's website and featured a wide selection of expert interviews, videos and blogs. A special edition of IFA's Fertilizers & Agriculture newsletter on IFA2030 was also published in December 2018 and was featured on social media through January 2019.

### ► MARKET INTELLIGENCE

IFASTAT, IFA's statistical portal, was launched at the IFA2018 in June 2018; providing IFA members with seamless access to IFA statistics on fertilizer and raw materials supply and demand.

The Agriculture and Production & International Trade Services made available more than 2,000,000 figures on IFASTAT: the coverage of fertilizer demand and supply data offers 45 yrs and 15 years of detailed statistics, respectively.

Detailed market intelligence information is easily available, including downloadable statistics tables in Excel format, statistical and outlook reports, access to comprehensive databases, and Product & Country Factsheets. In 2018, 10 product factsheets and 15 country factsheets were published.

In addition, IFA released:

- Four comprehensive Global Fertilizer Markets Outlooks on short and medium-term perspectives for the fertilizer industry;
- Three webinars: The Sub-Saharan Africa Outlook (March); the Medium-Term Fertilizer Outlook (July) and the Short-term Outlook of World Fertilizer Demand and Supply (November);
- 44 statistical reports on fertilizer products (by year and quarter) and 12 capacities reports;
- An update of 2016 /17 figures on fertilizer consumption for crop nutrition uses.

► **NEW IFA WEBSITES**

In October, IFA launched its two new websites: a modernized public site, with a user-friendly look and improved navigation and several new features, such as a plant nutrition menu, IFA2030 blog, and hot topics on the homepage; and a brand-new Members' site, a one-stop-shop for all IFA materials. The Members' site also contains new features such as the ready-to-use tools; Committee information; IFA2030 Menu, Chinese and Russian pages.

These two sites, along with the new IFASTAT site launched in July, mark a new digital age for IFA. We are proud to make IFA's greatly valued statistics available to our members in a streamlined and user-friendly way.



► **INDUSTRY BEST PRACTICES**

The PIT Service worked hard to deliver a voluntary, simple, user-friendly trade contract for seaborne dry bulk shipments.

The contract for dry bulk is its final form, and liquid bulk is in progress. Once finished, IFA members will have access to the contracts and Reference Guide on the Members' site, as well as a series of webinars to facilitate their use.

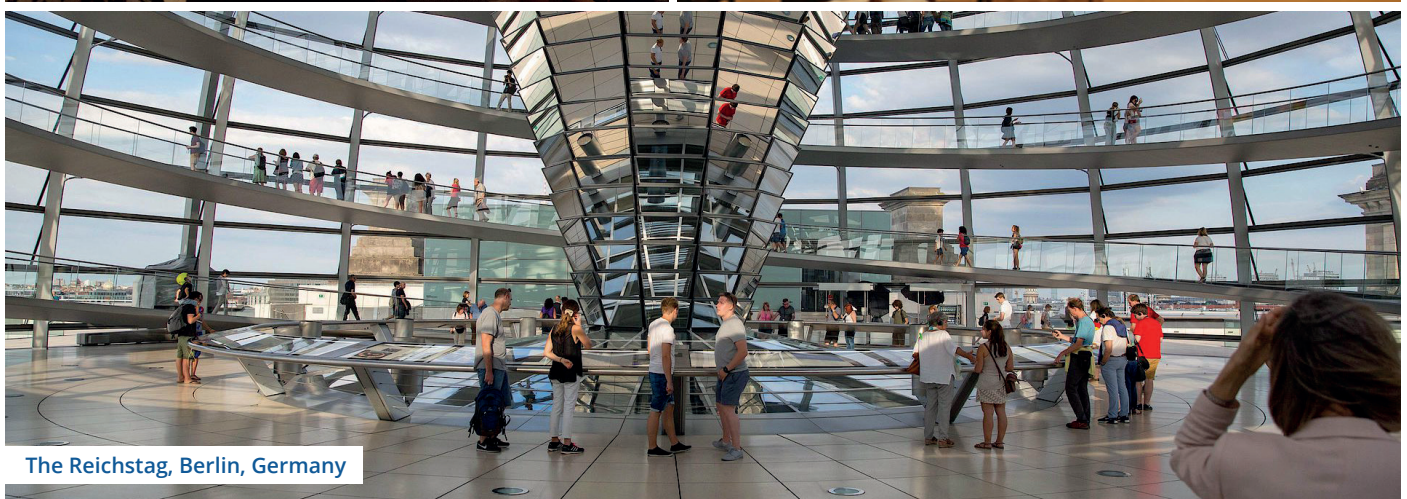
► **IFA EVENTS**



IFA 86<sup>th</sup> Annual Conference, Berlin



Ag Innovation Showcase, St. Louis, Missouri



The Reichstag, Berlin, Germany

| Attendance at IFA Conference                        | Location and date                  | Participants |
|---|------------------------------------|--------------|
| 2018 Joint Communications-Agriculture Meeting       | 29-31 January, Rome, Italy         | 79           |
| 2018 Production And International Trade Conference  | 6-8 March, Buenos Aires, Argentina | 78           |
| 2018 Global Technical Symposium                     | 9-12 April, Madrid, Spain          | 166          |
| 86 <sup>th</sup> IFA Annual Conference, Berlin 2018 | 18-20 June 2019, Berlin, Germany   | 1355         |
| 2018 IFA Crossroads Asia-Pacific Conference         | 23-25 October, Singapore           | 370          |
| 2018 IFA Strategic Forum                            | 13-14 November, Beijing, China     | 205          |

The Conference Service noted a 2% increase in participation at IFA Events compared to 2017, with 2,230 delegates and 170 Young Professionals in attendance (compared to 2,210 and 142 in 2017).

The IFA Annual Conference took place on 18-20 June in Berlin and attracted 1,355 delegates, confirming its importance to the global fertilizer industry. The ever-growing participation of the Young Professionals is also encouraging and shows that IFA's events meet the expectations of our Members. Thank you to our sponsors, K+S, Kingenta, OCP, Sabic, Yara and GPIC.

The 2018 Strategic Forum held in Beijing on 13-14 November had a record attendance. The conference focused on China and India's plant nutrition related policies, especially relevant to all industry players considering both account for almost 40% of global population, and 40% and 37% of fertilizer demand and production respectively. We are very grateful to our participants and appreciate the generous sponsorships of Kingenta, China BlueChemical Ltd, Sinochem Agriculture, IFFCO, Migao Corporation and CNAMPGC Holding Ltd Corp.

## 2018 Review

*Thank you to all our Sponsors*

The image displays a collection of logos for various fertilizer companies and organizations. The logos are arranged in a grid-like fashion, with some larger and more prominent than others. The logos include: YARA, Kingenta (金正大国际), Fertiberia, KEMAPCO (ARAB FERTILIZERS & CHEMICALS INDUSTRIES LTD.), PHOSAGRO, MA'ADEN (Saudi Arabian Mining Company), K+S (Experience growth.), PROFERTIL, SABIC, CNAMPGC HOLDING LIMITED CORPORATION, Arab Potash (البوتاس العربية), China BlueChemical Ltd. (中海石油化学股份有限公司), GPIC, OCP, MIGAO CORPORATION, SINOCHEM AGRICULTURE, IFA (INTERNATIONAL FERTILIZER ASSOCIATION), SDIC (国投新疆罗布泊钾盐有限责任公司), and IFFCO (Wholly owned by Cooperatives).

## REGIONAL SEMINAR ON NUTRIENT STEWARDSHIP FOR WEST ASIA AND NORTH AFRICA

8-9 October 2018, Amman, Jordan



Regional Seminar on Nutrient Stewardship, Amman, Jordan

Nearly half of our delegates used our IFA Conferences App- where programs and accompanying documents are accessible for all conference participants.

IFA partnered with the Larta Institute and the Danforth Plant Science Center on the 2018 Ag Innovation Showcase, held in St. Louis, Missouri, USA from 10-12 September. This was the first ever ag tech event with a special focus on plant nutrition solutions. The conference held four fertilizer-focused sessions and a range of specially selected ag tech startups showcasing innovative plant nutrition solution were presented.

### IFA PROMOTES COMPREHENSIVE STEWARDSHIP

#### ► NUTRIENT STEWARDSHIP

The Chinese translation of the Nutrient Management Handbook, which provides in a succinct and clear manner the key principles of fertilizer application best management principles, was released in April 2018, and 42,000 copies were ordered by IFA Members in China. Translations in Arabic, French, Portuguese and Spanish are also in preparation.

IFA's annual regional Nutrient Stewardship seminar was held in Amman on 8-9 October, and was co-organized with AFA, IPNI and Arab Potash. The seminar gathered 180 delegates, from governmental and scientific institutions, business and industry, and farmers organizations. It emphasized the need to improve the management performance of both nutrients and water. Special sessions were dedicated to fertigation, precision farming, and outreach to farmers.

The 5th International Zinc Symposium, held in September in Leuven, Belgium, was also co-organized by IFA, and attended by 74 delegates who reviewed the latest knowledge and best agricultural practices in addressing zinc deficiency and its impact on crop production and human health.

#### ► AWARDS



The recipient of IFA's 2018 Norman Borlaug Award was Prof. Weifeng Zhang from China Agricultural University. Most celebrated for his work to help revise China's approach to fertilizer use, Prof. Zhang was recognized for his great efforts to addressing agricultural issues at all levels, working with government to shape policy as well as farmers to implement reforms.





IFA SHE Excellence Ceremony, Beijing, China

### ► YEAR OF THE BENCHMARK

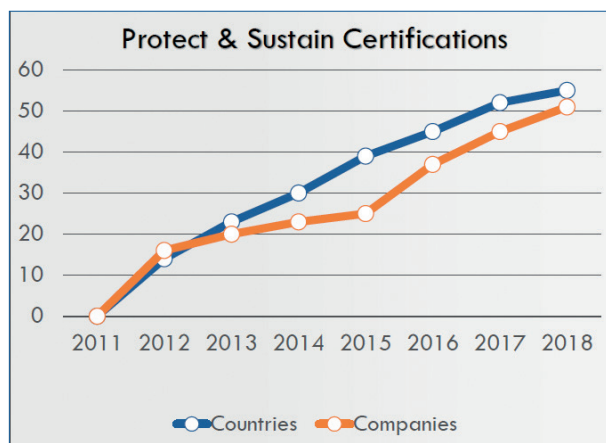
For the first time since the creation of IFA's Safety, Health & Environment (SHE) metrics at the beginning of the millennium, all four benchmark cycles were conducted in the same year (Employee Safety Performance, Employee Safety Perceptions, Environmental Performance, Energy Efficiency & CO2 Emissions).

This Year of the Benchmark saw the highest voluntary participation to IFA benchmarks since their creation, and the trends emerging from some of the benchmarks' indicators show the continuous improvement of our members in the areas of Safety, Health and the Environment. At the 2018 IFA Strategic Forum in Beijing, IFA Chairman Rakesh Kapur presented an IFA SHE Excellence Gold Medal to 22 top SHE performers of the year.



### ► PROTECT & SUSTAIN

The Protect & Sustain Hall of Fame gained 6 new members in 2018, which brings the number of certified fertilizer companies to 51 in 57 countries. Protect & Sustain is IFA's voluntary product stewardship certification which has become the de facto global standard for fertilizer companies. It is also available to non-producer IFA Members.



### ► PRODUCT SECURITY

IFA's Product Security actions focused on reducing the misuse of nitrogenous fertilizers for bomb-making in Africa. A dedicated video tutorial was shown all year by the IFDC and the AFAP, as well as the U.S. Army and the World Customs Organization in their in- and external trainings all over the continent. IFA's popular product security posters (exist in five regional languages) were distributed as hardcopies at these occasions.

**Product Security Questions for Companies Dealing with Nitrogen Fertilizers**

**Security on Site:**

- ① Has a security coordinator for the site been nominated?
- ② Is there a security plan for the site?
- ③ Has the security plan got provisions for appropriate security measures?
- ④ Are there access/identity controls of people and vehicles?
- ⑤ Is access only for authorized persons?
- ⑥ Is there a record keeping of raw materials, intermediates and products in storage?
- ⑦ Is there a reporting and recording system for suspicious observations and theft in place?

**Security in Supply Chain:**

- ① Has a security coordinator for the supply chain been nominated?
- ② Is there a security plan for the transport, distribution and external storage?
- ③ Has the security plan got provisions for appropriate security measures?
- ④ Is there a security plan for authorized persons only?
- ⑤ Is there a record keeping of products in external storages and at distributors?
- ⑥ Is pick-up at production sites and external storages only by recognized customers and service providers with unique reference and relevant documentation and do they have the required certificates?
- ⑦ Is there a verification (and record keeping where appropriate) of identity of transporter/hauler/driver at site or place of loading?
- ⑧ Is there access control for ships and barges when in port?
- ⑨ Is there a reporting and recording system for suspicious observations and theft in place?

**Security for Sales:**

- ① Are sales restricted to identified/recognized distributors/professional users?
- ② Are internet sales restricted to verified and account-holding customers?
- ③ Do you keep records of sales and deliveries?
- ④ Is there a reporting and recording system for suspicious transactions?
- ⑤ Do you have a system for safety and security awareness communication to your staff, customers and procured logistical activities?

The above product security questions are part of Protect & Sustain ([www.protectandsustain.com](http://www.protectandsustain.com)), which is the product stewardship certification of the International Fertilizer Association.





## **IFA ENGAGES IN STRATEGIC OUTREACH AND PARTNERSHIPS**

### **► INTERNATIONAL OUTREACH**

One of the key activities of IFA's international outreach focused on the FAO's "Code of Conduct for the Management of Fertilizers". IFA participated in several online consultations and organized a successful advocacy campaign among selected Member States to address the flaws of the proposed draft document, namely its insufficient focus on the under-use of fertilizers.

With the objective to strengthen UN Environment's understanding of fertilizers, IFA organized an educational tour on agriculture in December with several IFA members; joined the consultative group for the forthcoming "Environmental and Health Impact Report of Fertilizers and Pesticides"; and took part in several activities of its Science-Policy- Business Forum (of which it is a consortium member).

IFA also successfully intervened in the definition of SDG Indicator 2.4.1. ("the percentage of agricultural area under productive and sustainable agriculture") by eliminating the FAO's proposals to measure "the reduction of mineral fertilizers" as a criteria for biodiversity on the farm, and to categorize the use of organic farming practices automatically under a "green" criteria for best farming practices.

IFA was strongly engaged on climate change throughout the year: submitting its views on the UNFCCC's agriculture agenda and attending the meetings of its Working Group on Agriculture in May and December; delivering a paper to policy makers on "Measuring and Reporting Fertilizer-Related GHG emissions", based on a scientific report published by CIMMYT-CCFAS; and further reinforcing the role of fertilizers in climate change adaptation and mitigation through the organization of two webinars in April and November that attracted over 100 participants each.

Finally, IFA signed a MoU with the World Farmer's Organization in December to launch a "Farmers' Driven Climate Change Agenda". Through this strategic partnership, IFA will continue raise awareness of fertilizer best management practices, and their important contribution to farmers' adaptation and mitigation potential.

### **► COMMUNICATIONS**

IFA ran several important communications campaigns in 2018: on IFA2030 (which included multiple expert interviews with IFA Members and external stakeholders, over 10 videos, and articles on the future of plant nutrition); on Integrated Plant Nutrient Management (that included expert interviews and a backgrounder)





Africa an emerging market

and around Global Fertilizer Day, with a quiz on fertilizer production and a widely shared infographic on the benefits of nutrients for plant and human health.

IFA also ran a two successful media campaigns around the IFA Norman Borlaug Award (with 2 op-eds placed in the Financial Times and Foreign Policy) and the Ag Innovation Showcase.

Throughout the year, IFA published and promoted expert blogs, examples of nutrient management implemented around the world, 4 press releases and over 10 notebook posts (in addition to the content from its campaigns and new IFA2030 blog). IFA's social media channels grew steadily, with nearly 2,000 more followers on LinkedIn (reaching 7k) and 1,656 more on Twitter (reaching 13k).

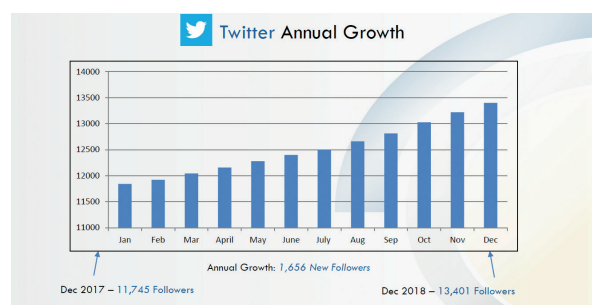
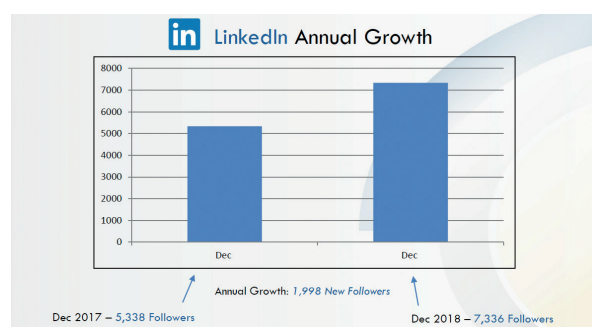
### ► FERTILIZER USE-RELATED POLICY COUNTRY FACTSHEETS

The Agriculture Service released eight policy country factsheets covering the top-10 consuming markets covered for Brazil, Canada, Australia, China P.R, EU, India, USA. All are available on IFA's Member site.

### ► REGIONAL INITIATIVES

#### Africa

The IFA Africa Forum met twice in 2018. The record attendance at the first meeting held in February in Addis Adaba (43 people) illustrated the growing interest for this emerging market and support to IFA's involvement in the region. Participants discussed the implementation of the IFA Africa strategy in 2018.





The second meeting took place in September in Cape Town, where members were updated on the progress achieved by the Africa Fertilizer Financing Mechanism, as well as the preparatory process for the Abuja 2 Summit, and negotiations for the FAO code of conduct on fertilizers.

IFA also participated in the Arab Fertilizer Association's 24th Annual Forum and Exhibition in Cairo. Michel Prud'homme, Senior Director of International & Trade Service, chaired a session and presented a short-term outlook on global fertilizer supply and demand, while Technical & Safety-Health-Environment Service Director, Volker Andresen covered product stewardship, with a special focus on IFA's Protect & Sustain certification and four benchmarks.

## China

The Secretariat met several members of the IFA China Consultative Group (CCG), Chinese government officials and key stakeholders in Beijing in March/April 2018 to prepare the program of the IFA Strategic Forum in Beijing (November 2018). IFA is grateful to its Chinese members for their sponsorship to the 2018 Strategic Forum (Kingenta, Sinochem, China BlueChemical, Migao, and Sino-Agri).

The Secretariat also organized the annual meeting of the IFA China Consultative Group (12 November 2018), with a program focusing on Chinese fertilizer industry's supply-side reforms and the effects of the escalating trade disputes. The 2018 CCG Convenor was Mr Qin Hengde, CEO of Sinochem Agriculture.

## Latin America

The Secretariat organized a workshop on 22 January in São Paulo, at the margin of the Fertilizer Latino Americano conference. The purpose of this workshop was to train fertilizer market analysts and agronomists in fertilizer demand forecasting, with a focus on Latin America. A mix of presentations from experts and interactive exercises were successfully used to fulfill that objective.

The Secretariat also hired a consultant to investigate several fertilizer markets in Latin America, with the objective to collect historical consumption statistics to complete the IFASTAT consumption database and IFA's estimates of fertilizer use by crop; and to help IFA identify reliable long-term correspondents for the most important countries, and sources of information for the smallest ones.

# FINANCE



In 2018, total operating income amounted to € 9.55 million, representing an increase of 9.7 per cent compared to 2017. This positive outcome mostly resulted from higher than anticipated revenue from conferences and meetings, mainly on account of the additional income from sponsorship which accounted for about 21 per cent of the total revenue from conferences and meetings. The other factors behind the higher operating income stem from an increase of 2.2 per cent in income from subscriptions and by additional contributions to finance the second part of the “IFA2030” strategic review and a benchmarking survey carried out in 2018.

Operating expenditures were increased by 13.7 per cent compared to the year before and reached some €9.58 million (up from € 8.42 million in 2017). This difference was essentially due to the organizational costs of the conferences and meetings which were higher than in 2017. However, revenue from sponsorship offset a large part of these additional costs. Furthermore, several budget items were increased compared to the previous year, including staff costs and external consultancy fees, but savings were made in other areas of expenditure, partially offsetting the extra costs.

Referring to financial activity, the year ended with a deficit of some € 175,000, against a negative outcome of about € 9,000 in 2017. This situation was explained by the decrease in the fair value of investments, resulting from the downturn of the financial markets registered throughout the year. In addition, income from investments remained extremely low on account of the weak performance on two short-term instruments in euros.

In summary, the year 2018 ended with a deficit of about € 142,000, the impact of which on IFA reserves was more than offset from the surplus of some € 215,000 which was registered in the accounts for 2017.

Details of the Association’s financial situation in 2018 are provided in the “Audited Accounts at 31 December 2018” attached to the Annual Report.

# IFA SECRETARIAT



## DIRECTOR GENERAL'S OFFICE

**1 Charlotte Hebebrand** Director General

**2 Claire Boutaric** Member Services Coordinator and Executive Assistant to the Director General

## I.T. SERVICE

**3 David François** I.T. Director

**4 Aline Bortot** I.T. Assistant

## AGRICULTURE SERVICE

**5 Patrick Heffer** Senior Director

**6 Samy Beltaief** Policy Analyst

**7 Armelle Gruère** Program Manager - Fertilizer Demand

## PRODUCTION & INTERNATIONAL TRADE SERVICE

**8 Michel Prud'homme** Senior Director

**9 Marina Simonova** Director (started in 2019)

**10 José de Sousa** Program Manager - Supply

**11 Virginie Couturier** Phosphate Products Senior Market Analyst

**12 Olivier Rousseau** Potash & NPK Senior Market Analyst

**13 Sylvie Marcel- Monnier** Project Coordinator

## TECHNICAL & SHE SERVICE

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**14 Volker Andresen** Director

**15 Lucia Castillo Nieto** IFA Technical & SHE Analyst  
(started in 2019)

## COMMUNICATIONS & PUBLIC AFFAIRS SERVICE

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**16 Yvonne Harz-Pitre** Director

**17 Margot Clifford Laguette** Communications Specialist

**18 Sam Joll** External Communications Specialist

**19 Sophie Babeix** Assistant

## CONFERENCE SERVICE

---

**20 Stéphane Leleu** Director

**21 Valérie Corformat** Conference Planner

**22 Sandie Bouttemy** Conference Planner

**23 Jessica de Lafargue** Conference Planner

**24 Hélène Ginet** Communications Specialist

## ADMINISTRATIVE SERVICE

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**25 Florence Lambert** Director

**26 Aurélien Palaric** Senior Accountant

**27 Sylvain Rivière** Accountant

# IFA MEMBERSHIP

At the end of 2018, the number of members of the Association reached 464 covering 69 countries. The various categories of membership were represented as follows:

- **171 Ordinary members**
- **188 Associate members**
- **45 Correspondent members**
- **60 Affiliate members**

## ELECTED MEMBERS

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***DURING 2018, 35 NEW MEMBERS WERE ELECTED AS FOLLOWS:***

### ► ORDINARY MEMBERS

- New Karvali Fertilisers SA (Greece)
- PFIC Ltd (Greece)
- ENAS (Rwanda)
- Intrepid Inc. (United States)

### ► ASSOCIATE MEMBERS

- Australian Potash Company (Australia)
- Reward Minerals Ltd (Australia)
- Lhoist Group (Belgium)
- Milliken Europe BVBA (Belgium)
- Vertical Exploration Inc. (Canada)
- Itafos (Cayman Islands)
- China Leon Inspection Holding Limited (China P.R.)
- SDIC Mining Investment Co. Ltd (China P.R.)
- El Dawlia for Trading and Mining (Egypt)
- AB Etiproducts Oy (Finland)
- Desmet Ballestra SpA (Italy)
- Italpollina S.p.A. (Italy)
- JAT Offshore SAL (Lebanon)
- Kao Corporation (Spain)
- Litasco SA (Switzerland)

- Omya International AG (Switzerland)
- Solevo Suisse SA (Switzerland)
- Gavilon Fertilizer LLC (United States)
- Pursell Agri-Tech LLC (United States)
- Vinh Tranh Trade Co. Ltd (Vietnam)

### ► AFFILIATE MEMBER

- The Energy and Resources Institute (TERI) (India)

### ► CORRESPONDENT MEMBERS

- Eduardo Tadeu de Paiva (Brazil)
- Roger Larson (Canada)
- Kapil Mehan (India)
- Rajiv Sinha (India)
- Dani Chen (Israel)
- Ahmed Bajeddoub (Morocco)
- Abdallah El Houari (Morocco)
- Mondher Maaref (Tunisia)
- Bruce David Neale (United Kingdom)
- Ralph Thawley (United Kingdom)

## RESIGNATIONS

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### ***THERE WERE 19 RESIGNATIONS DURING THE YEAR***

#### ► ORDINARY MEMBERS

- Cosmo Trade & Service Co. Ltd (Japan)
- Asturiana de Fertilizantes S.A. (Spain)

#### ► ASSOCIATE MEMBERS

- Nidera SA (Argentina)
- RHEWUM (Germany)
- M/S Oilex Exploration Supplies Private Ltd (India)
- Marubeni Corporation (Japan)
- Rawfert s.a.l. (Lebanon)
- Chatham Rock Phosphate Ltd (New Zealand)
- Plaman Resources Ltd (New Zealand)



- Bery Maritime (Norway)
- Alpha Management Overseas AG (Switzerland)
- iTrade Ferts SA (Switzerland)
- Opdebeeck SA (Switzerland)
- Asean Potash Chaiyaphum Public Company Ltd (Thailand)
- Applied Chemical Technology, Inc (United States)
- Orono Spectral Solutions (United States)
- JSC "Uzsanoatexport" (Uzbekistan)

#### ► CORRESPONDENT MEMBERS

- John Van Brunt (Canada)
- Michael Freeman (United Kingdom)

## NAME CHANGE

#### ► ORDINARY MEMBER

- UBE Chemical Europe (SA) (Spain) has become UBE Corporation Europe S.A.U.

## OTHER CHANGES

#### ► ORDINARY MEMBERS

- Vale Fertilizantes -Vale's assets in fertilizer segments- (Brazil) has been acquired by Mosaic (United States).
- The Vale Cubatao Fertilizantes complex (Brazil) has been acquired by Yara (Norway).
- PotashCorp (Canada) and Agrium Inc. (Canada) have merged and formed a new company called Nutrien.
- The phosphatic fertilizers business of Tata Chemicals Ltd (India) has been acquired by IRC Agrochemicals Private LTd, a wholly owned subsidiary of Indorama, an Ordinary member of IFA.

#### ► ASSOCIATE MEMBERS

- GB Minerals (Canada) is now part of Itafos, which has applied for Associate membership.
- The membership of Disagro (Guatemala) has been transferred to INCOFE (Guatemala)
- M/S Matix Fertilisers & Chemicals Limited (India) has started production and its membership has been transferred to the Ordinary membership category
- The membership of Liven Agrichem Pte Ltd (Singapore) has been transferred to a new company Agrifert Liven International Pte Ltd, Singapore

- We have been informed that NCTC AG, a trading company in Switzerland is in liquidation.
- The membership of Getax Agrifert DMCC (United Arab Emirates) has been transferred to Agrifields DMCC (United Arab Emirates).
- Argus Media (United Kingdom) has announced the acquisition of Integer Research (United Kingdom); both are members of IFA.

#### ► **CORRESPONDENT MEMBER**

- We were saddened to learn the passing of Mr. Paul A. Smith (Brazil)

## **MEMBERSHIP TERMINATION**

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#### ► **ORDINARY MEMBERS**

- Luxi Chemical Group Co. Ltd (China P.R.)
- Wuxi City Pacific Fertilizer Co., Ltd (China P.R.)
- Yantai Ruimei Fertilizer Co., Ltd (China P.R.)
- P.T. Saraswanti Anugerah Makmur (Indonesia)
- Puccioni 1888 S.r.l. (Italy)
- CSC "Arvi fertis" (Lithuania)
- Groupe Charaf Fertima (Morocco)
- OSTCHEM Holdings Ltd (Ukraine)

#### ► **ASSOCIATE MEMBERS**

- Forbon Technology Co., Ltd (China P.R.)
- Alvigo A.S. (Estonia)
- JSC Gazagrochem (Russian Federation)
- Comspain XXI, S.A. (Spain)
- NPK Fertilizer Advisory Service (NPKFAS) (United States)

#### ► **CORRESPONDENT MEMBERS**

- Patrick Loo Chong Poh (Malaysia)
- Abdelwahed Hourir Alami (Morocco)
- Tahir Saleem (Pakistan)
- Khalifa A. Al Sowaidi (Qatar)

# PAST ANNUAL CONFERENCES

## 2010-2018

|      |        |      |           |      |        |      |          |
|------|--------|------|-----------|------|--------|------|----------|
| 2018 | Berlin | 2017 | Marrakech | 2016 | Moscow | 2015 | Istanbul |
| 2014 | Sydney | 2013 | Chicago   | 2012 | Doha   | 2011 | Montreal |
| 2010 | Paris  |      |           |      |        |      |          |

## 2000's

|      |           |      |              |      |           |      |              |
|------|-----------|------|--------------|------|-----------|------|--------------|
| 2006 | Cape Town | 2009 | Shanghai     | 2008 | Vienna    | 2007 | Istanbul     |
| 2002 | Lisbon    | 2005 | Kuala Lumpur | 2004 | Marrakech | 2003 | Philadelphia |
|      |           | 2001 | Sydney       | 2000 | Oslo      |      |              |

## 1990's

|      |           |      |             |      |        |      |           |
|------|-----------|------|-------------|------|--------|------|-----------|
| 1998 | Toronto   | 1997 | Beijing     | 1996 | Berlin | 1999 | Manila    |
| 1994 | Istanbul  | 1993 | New Orleans | 1992 | Seoul  | 1995 | Singapore |
| 1990 | Vancouver |      |             |      |        | 1991 | London    |

## 1980's

|      |                   |      |           |      |             |      |         |
|------|-------------------|------|-----------|------|-------------|------|---------|
| 1986 | Bangkok           | 1989 | Budapest  | 1988 | Monte Carlo | 1987 | Orlando |
| 1982 | Palma de Mallorca | 1985 | Munich    | 1984 | Mexico City | 1983 | Vienna  |
|      |                   | 1981 | Singapore | 1980 | Monte Carlo |      |         |

## 1970's

|      |          |      |            |      |           |      |                |
|------|----------|------|------------|------|-----------|------|----------------|
| 1978 | Cannes   | 1977 | Copenhagen | 1976 | London    | 1979 | Rio De Janiero |
| 1974 | Tenerife | 1973 | Rome       | 1972 | Deauville | 1975 | San Francisco  |
| 1970 | Athens   |      |            |      |           | 1971 | Amsterdam      |

## 1960's

|      |             |      |                     |      |                    |      |             |
|------|-------------|------|---------------------|------|--------------------|------|-------------|
| 1966 | Miami Beach | 1969 | Burgenstock/Lucerne | 1968 | Berlin             | 1967 | Monte Carlo |
| 1962 | Vienna      | 1965 | Lisbon              | 1964 | m/v Cabo san Roque | 1963 | Lausanne    |
|      |             | 1961 | Casablanca          | 1960 | Venice             |      |             |

## 1950's

|      |            |      |              |      |        |      |          |
|------|------------|------|--------------|------|--------|------|----------|
| 1958 | Copenhagen | 1957 | Scheveningen | 1956 | London | 1959 | Biarritz |
| 1954 | Lisbon     | 1953 | Stockholm    | 1952 | Cannes | 1955 | Hamburg  |
| 1950 | Madrid     |      |              |      |        | 1951 | Lucerne  |

## 1940's

|      |       |           |                |      |          |      |            |
|------|-------|-----------|----------------|------|----------|------|------------|
| 1946 | Paris | 1949      | Copenhagen     | 1948 | Brussels | 1947 | Eastbourne |
|      |       | 1945-1940 | No conferences |      |          |      |            |

## 1930's

|      |            |      |       |      |            |      |             |
|------|------------|------|-------|------|------------|------|-------------|
| 1938 | Rome       | 1937 | Paris | 1936 | Budapest   | 1939 | The Hague   |
| 1934 | Lisbon     | 1933 | Paris | 1932 | Copenhagen | 1935 | Gleneagles  |
| 1930 | Interlaken |      |       |      |            | 1931 | Baden-Baden |

## 1920's

|      |        |      |           |      |         |
|------|--------|------|-----------|------|---------|
| 1929 | Vienna | 1928 | Stockholm | 1927 | Hamburg |
|------|--------|------|-----------|------|---------|

# PAST PRESIDENTS

**2015-17**

A. Jawahery

**2009-11**

A.S. Shriram

**2003-05**

J.M. Van Brunt

**1997-99**

U.S. Awasthi

**1991-93**

B.B. Turner

**1985-87**

A.B. Al-Nouri

**1979-81**

G. Artaud

**1973-75**

A. Robinson

**1965-69**

G.M. Mason

**1956-59**

R. Grandgeorge

**1946-49**

A. Waller

**2013-15**

E. Mete

**2007-09**

T. Enger

**2001-03**

W. Puggina

**1995-97**

C.E. Childers

**1989-91**

W. Klaassen

**1983-85**

K.H. Tillmann

**1977-79**

P. Latteur

**1971-73**

R. Mathieu

**1962-65**

J. Capelo Portabella

**1953-56**

D.J. Bird

**1937-39**

E. Berr

**2011-13**

B. Doyle

**2005-07**

S. Wu

**1999-01**

E. Tirkkonen

**1993-95**

E. Öner

**1987-89**

G.P. Giusti

**1981-83**

J. Miro Chavarria

**1975-77**

W.J. Turbeville, Jr.

**1969-71**

J.D. Waller

**1959-62**

H. Stevenius-Nielsen

**1949-53**

R. Standaert

**1927-37**

E.G. Martens



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