



IFA'S 2019 ANNUAL REPORT



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FOREWORDS

FROM THE CHAIRMAN

Innovation & Collaboration



The fertilizer industry is one vital part of a complex global web with one common goal, to feed the growing global population, sustainably. The challenge of striking that balance – providing a reliable, affordable supply of nutritious food while respecting the planet and responding to climate change – is growing more urgent by the day.

We at the International Fertilizer Association are proud to contribute to this vital mission, both by innovating in our own business and by sharing and learning with and from others. This 2019 Annual Report highlights the ways in which our organization and its members are changing and growing to help feed the world sustainably.

Innovation and collaboration are key. In Montreal, a select group of finalists presented plant nutrition innovations to an audience of more than 200 delegates hailing from all corners of the globe. We revisited those themes in Minneapolis, where investors, agribusinesses, and startups gathered to test new solutions that will boost productivity and promote resilience at all points along the food and ag value chains. And we concluded this productive year in Paris, where World Food Prize winner Dr. David Nabarro led members to chart out a new paradigm for our sector at the first-ever High-Level Forum on Sustainable Plant Nutrition.

These and other achievements – further detailed in the pages of this report – are touchstones of the long journey of transformation on which our industry has embarked. We know that there is still much to do, but we are proud and confident about the direction in which we are headed.

Mostafa Terrab
Chairman

FROM THE DIRECTOR GENERAL

A New Paradigm for Plant Nutrition



The contribution of fertilizers to improving agricultural yields and thus promoting global food security is well understood. Yet with agricultural systems criticized as being insufficiently sustainable, and players in the broader agri-food value chain, beginning with input providers, farmers and ending with food manufacturers and retailers, coming under increasing scrutiny, increased yields – while these remain hugely important in light of an expected population of close to 10b by 2050 – are no longer the only objective. In fact, while food security

was the clarion call of the Green Revolution, the guideposts of our age are the numerous Sustainable Development goals which are closely linked to agricultural systems, including SDG 2 (Zero Hunger), SDG 1 (No Poverty), 3 (Good Health and Well Being), 6 (Clean Water and Sanitation), 9 (Industry Innovation), 12 (Responsible Consumption and Production), 13 (Climate Action), 14 (Life Below Water) and 15 (Life on Land).

At the first edition of the High Level Forum on Sustainable Plant Nutrition, a multi-stakeholder forum convened by IFA in November 2019 in Versailles, prominent voices from the industry, and the farming, policy, research and NGO communities, fittingly agreed jointly on the need to develop a new paradigm for plant nutrition, which incorporates the important role of plant nutrition in meeting a broader set of objectives. Fertilizers contribute not only to food security, but also nutritional security, poverty alleviation and help to support carbon sequestration in forest and soils. Moreover, more efficient fertilizer use can mitigate key environmental impacts, and help to safeguard water and air quality and biodiversity. As this new paradigm becomes more defined, there's another important SDG that must guide us: SDG 17 (Partnerships for the Goals). Farmers, scientists, governments, and foundations played a crucial role in promoting the Green Revolution, and should also be called on to participate in shaping and implementing this new paradigm for sustainable plant nutrition.

Charlotte Hebebrand
Director-General

TOWARD A NEW PARADIGM FOR SUSTAINABLE PLANT NUTRITION

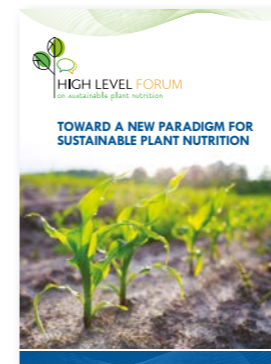
On 18-19 November 2019, IFA convened its first-ever **High-Level Forum on Sustainable Plant Nutrition** in Versailles, France, attended by over 260 participants, including leading scientific and policy experts in the realms of agriculture, environment, food, nutrition and climate change. The event was chaired by the 2018 World Food Prize Laureate **Dr. David Nabarro**.

The Forum embarked on a concerted and ongoing dialogue with key stakeholders of the fertilizer industry, to assess the vital role of plant nutrition in addressing the challenges and opportunities of fast-changing agricultural systems as well as proposed transformations within the context of the Sustainable Development Goals:

All stakeholders agreed that the urgent responsibility to improve our food system globally requires collaborative efforts from the fertilizer industry, the research and NGO sectors and governments. Several key recommendations emerged from the High-Level Forum, including:

KEY RECOMMENDATIONS

- 1 The articulation and implementation of a new paradigm for plant nutrition which incorporates a greater focus on nutrition, seeks to reduce the overall environmental footprint of the entire agri-food value chain and support for carbon sequestration in forests as well as agricultural soils.
- 2 The desirability of shifting focus from “fertilizer products” to “plant nutrition solutions,” including services and digital innovations that can more precisely match farmers’ needs and enhance nutrient use efficiency. This requires increased investment in R&D and partnerships;
- 3 Higher resource engagement from governments and public funded research organizations to enhance scientific knowledge and transfer tools in the realm of agronomy, including soil health and fertility. This effort should be combined with pursuing extension to farmers at scale, facilitated by digital technologies and the development of fertilizer recommendations encompassing large areas.



The outcomes of the Forum’s deliberations were presented in a Report entitled “Toward a New Paradigm for Sustainable Plant Nutrition”* which frames the context of these exchanges within **five major changes confronting global agricultural systems** (producing more with less; balancing high productivity with environmental impacts; achieving climate-smart agriculture on a global scale; equipping all farmers with knowledge and capacity to practice sustainable plant nutrition; and minimizing and reversing the degradation of our natural resources) and **makes five major recommendations to guide industry development and growth**: Develop business models building on new opportunities; build innovative partnerships across the value chain; create a core operating system for data and digital tools; accelerate technology innovation and advance policy reform).

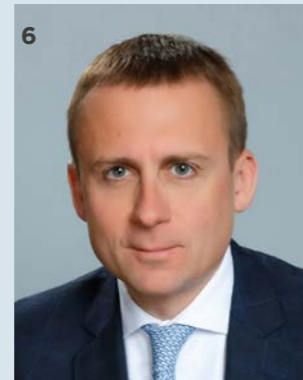
During the event, various representatives of IFA’s membership recognized these major challenges and presented a selection of corporate sustainable approaches. **As Mostafa Terrab, Chairman of the OCP Group and of IFA aptly stated: “Business as usual is clearly no longer an option for the fertilizer industry. I invite our Members to work together, and in partnership with our many stakeholders, to address these challenges and turn them into opportunities to provide vital support to the world’s farmers.”** Charlotte Hebebrand, IFA Director General, echoed this statement: **“It is a new paradigm not just for industry, but also for policymakers, farmers, consumers and international organizations. All hands on deck will be required.”**

The next High-Level Forum will take place in Kigali, Rwanda, on 19-20 November 2020 and will focus on the particular opportunities and challenges for plant nutrition in Africa.

*The Report “Toward a New Paradigm for Sustainable Plant Nutrition”, together with audio recordings and presentations of each session is available on the High-Level Forum on Sustainable Plant Nutrition’s dedicated website : www.highlevelforum.org

EXECUTIVE BOARD

MAY 2019- MAY 2020



1 MOSTAFA TERRAB
OCP, Morocco
IFA Chairman

2 RAKESH KAPUR
IFFCO- Indian Farmers
Fertiliser Cooperative
(IFFCO) Ltd, India
Immediate Past Chairman

3 CHUCK MAGRO
NUTRIEN, Canada
Vice Chairman

4 SVEIN TORE HOLSETH
YARA, Norway
Executive Board Member
& Chairman of the Finance
Committee

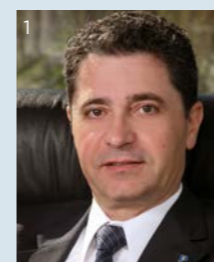
5 ZHAI JIDONG
KINGENTA, China P.R.
Executive Board Member

6 DMITRY KONYAEV
URALCHEM, Russian
Federation
Executive Board Member
& Chairman of the
Communications & Public
Affairs Committee

**7 CHARLOTTE
HEBEBRAND**
Director- General,
IFA Member ex-officio

IFA BOARD

MAY 2019- MAY 2020



Africa

- 1 MUNISH JINDAL**
Indorama Eleme Fert. & Chem. Ltd, Nigeria
- 2 WILLIAM P. O'NEILL**
IRM, United States/Madagascar

East Asia

- 1 MULYONO PRAWIRO**
P.T. Pupuk Sriwidjaja, Indonesia
- 2 ZHAI JIDONG**
Executive Board Member
KINGENTA, China P.R.
- 3 QIN HENGDE**
Sinofert Holdings, China P.R.
- 4 SHAMSAIRI MOHD IBRAHIM**
Petronas, Malaysia

Eastern Europe & Central Asia

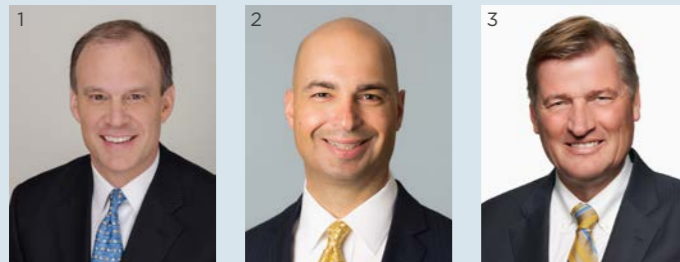
- 1 ANDREY GURYEV**
PHOSAGRO, Russian Federation
- 2 DMITRY KONYAEV**
URALCHEM, Russian Federation

Latin America

- 1 DANIEL PETTARIN**
Profertil, Argentina
- 2 MARCOS STELZER**
Resigned - May 2019

BOARD OF IFA

MAY 2019- MAY 2020



North America

- 1 TONY WILL**, CF Industries, United States
Chairman, Market Intelligence Committee
- 2 CHUCK MAGRO**, NUTRIEN, Canada
Vice Chairman
- 3 JAMES "JOC" O'ROURKE**
The Mosaic Company, United States



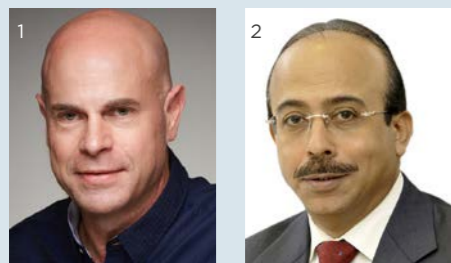
Oceania

- 1 IAN HANSEN**, Wesfarmers, Australia
Chairman, Agriculture Committee
- 2 JEANNE JOHNS**
Incitec Pivot, Australia



South Asia

- 1 RAKESH KAPUR**, IFFCO- Indian Farmers Fertiliser Cooperative (IFFCO) Ltd India
Immediate Past Chairman
- 2 MANOJ MISHRA**, National Fertilizers, India
- 3 TARIQ KHAN**, Fauji (FFCL), Pakistan



West Asia

- 1 RAVIV ZOLLER**
ICL, Israel
- 2 SAMIR AL ABDRABBUH**
SABIC, Saudi Arabia



Western & Central Europe

- 1 SVEIN TORE HOLSETH**, YARA, Norway
Chairman, Finance Committee
- 2 ALEXA HERGENRÖTHER**
K+S Minerals & Agric.GmbH, Germany
- 3 YVES CAPRARA**, PRAYON, Belgium
Chairman Tech & SHE Committee
Resigned - February 2020

IFA'S 2019 ACHIEVEMENTS

The first Plant Nutrition startup showcase and Award at IFA2019 in Montréal

To help foster strategic connections between the fertilizer industry and the AgTech sector, IFA organized its first ever Plant Nutrition Startup Showcase during its IFA2019 Annual Conference in Montréal in June 2019.

Seven finalists ([Atmonia](#), [Elemental Digest Systems](#), [Intrinsyx Bio](#), [Phospholutions](#), [Persistence Data Mining](#), [Vulpes Corp.](#), [Zenvus](#) and [3Bar Biologics](#)), selected from nearly 50 applicants, presented their plant nutrition related innovations at a dedicated startup corner and special pitch session to an international audience of over 200 delegates.

Following a roundtable discussion which introduced IFA members to the broader AgTech landscape and the emerging focus on plant nutrition solutions, the finalists presented their fertilizer-focused innovations, and a jury of five IFA members chose [3Bar Biologics](#) as winner of the \$20,000 Grand Prize.

IFA, alongside members, also sponsored the 2019 Ag Innovation Showcase held in Minneapolis, Minnesota on 10-12 September. This leading agtech conference brings together investors, established companies in the agrifood value chain and start-ups each year.

IFA CONFERENCES

Attendance at IFA Conference	Location and date	Participants
2019 Joint Communications-Agriculture Meeting	4-5 February 2019, Rome, Italy	77
IFA Production & International Trade Conference	6-7 March 2019, London, UK	117
IFA/New Ag International Conference on Slow- and Controlled-Release and Stabilized Fertilizers	25-27 March 2019, Dublin, Ireland	231
IFA Global Technical Symposium	8-11 April 2019, New Orleans, USA	123
87th IFA Annual Conference	11-13 June 2019, Montréal, Canada	1210
IFA Crossroads Asia-Pacific Conference	22-24 October, Sydney, Australia	301
2019 IFA Strategic Forum and first High-Level Forum on Sustainable Plant Nutrition	18-20 November 2019, Versailles, France	260

The Conference Service noted a 6% attendance increase for both female delegates (from 306 in 2018 to 324 in 2019), and Young Professionals (fertilizer professionals under 35 years old) in 2019, as well as a significant increase in the use of the Conference app (+25%) since 2018.

The IFA Annual Conference took place on 11-13 June in Montréal and attracted 1,210 delegates, which demonstrates its constant relevance for the global fertilizer industry. We thank our sponsors Nutrien, Syngenta, OCP, GPIC and Muntajat, and Fertilizer Canada for its kind support.

The 2019 Strategic Forum and first-ever High-Level Forum on Sustainable Plant Nutrition, held in Versailles, France on 18-20 November 2019, had a record attendance of 260 participants from 43 countries (compared to 205 in 2018); thanks to its ambitious programme and prestigious speakers. We are grateful to our participants and to the generous sponsorship of Yara, OCP and Nutrien.

2019 Review

Thank you to all our Sponsors



IFA INDUSTRY STEWARDSHIP

Product Stewardship

One of the key outcomes of IFA2030 was a strong demand from Members for IFA to help them position themselves as product stewardship leaders. In response, and building on IFA's efforts of promoting SHE excellence, IFA created an **Industry Stewardship Champion** category for Members that have participated in the latest IFA Employee Safety Performance, Environmental Performance and Energy Efficiency & CO2 Emissions Benchmark and have valid Protect & Sustain Certifications.

34 Members received a 2019 Industry Stewardship Champion gold medal for meeting these requirements during the IFA Strategic Forum in Versailles, bestowed by IFA Chairman Mostafa Terrab and Technical & SHE Committee Chairman Yves Caprara.

IFA's voluntary product certification Protect & Sustain also enjoyed a remarkable success throughout the year, with 53 Members from 57 countries becoming certified at IFA2019 in Montreal, and four more joining them in Versailles, making a total of 57 fertilizer companies in 57 countries in the **Protect & Sustain** Hall of Fame at the end of 2019.

IFA also successfully launched its first training with IFDC on slow- and controlled-release and stabilized fertilizers, which took place in Frankfurt on 22-26 June 2019. The training was sold out, with 50 students and 10 teachers from 21 countries in attendance.



Nutrient Stewardship

An important outcome of IFA's Board of Directors' meeting at IFA2019 in Montréal was the formal adoption of the **IFA Nutrient Stewardship Commitments**. Given the increasing scrutiny of nutrient losses to the environment, these six Commitments will help IFA Members position themselves on nutrient stewardship and reaffirm IFA's overarching goal to help farmers to improve nutrient use efficiency and effectiveness. The Commitments are the first step in a series of tools to be developed by IFA to help monitor and report industry's efforts to improve nutrient management performance. At the request of the Board of Directors, IFA is developing a code of practice on nutrient stewardship.

In line with its first Nutrient Stewardship Commitment "Greater outreach to Farmers", IFA engaged actively with the World Farmer's Organization's initiative: "**A Farmers' Driven Climate Change Agenda**", attending various Steering Committee meetings and a regional workshop in Brussels on 14 November; and supporting an official side-event at COP25 in Madrid dedicated to the initiative and its partners.

On 25-27 March 2019, IFA and New Ag International hosted the 4th Conference on Slow-and Controlled-Release and Stabilized Fertilizers in Dublin, Ireland. 231 delegates gathered for this popular triennial event, whose panels focused on the second assessment of the world market for special products; technological developments and nutrient management performance; and policy measures impacting this industry segment. IFA expresses its thanks to the sponsors: Haifa Chemicals, Koch Agronomic Services, BASF, EuroChem, ICL Specialty Fertilizers, and Solvay.

Reaffirming the overarching goal of helping farmers to improve nutrient use efficiency and effectiveness to optimize plant nutrient uptake and minimize nutrient losses to the environment,

IFA Members commit to:

1. Supporting greater outreach to farmers
2. Supporting research to improve fertilizer management practices
3. Supporting innovation in the field of plant nutrition solutions
4. Engaging in dialogue and partnership with stakeholders
5. Implementing the widely-agreed principles of nutrient stewardship
6. Where appropriate, documenting their efforts to enhance nutrient management performance



2019 IFA NORMAN BORLAUG AWARD



IFA Norman Borlaug Award

Prof. Andrew Sharpley

The recipient of the [2019 IFA Norman Borlaug Award](#) was Prof. Andrew Sharpley from the University of Arkansas.

A distinguished professor of soils and water quality, Dr. Sharpley was recognized for his work that has had a huge impact on helping farmers to better understand how to effectively manage phosphorus fertilizers to minimize losses.

He notably developed the P Index, a tool to identify which areas on a farm are most susceptible to phosphorus nutrient loss.

AGRICULTURE AND SCIENCE

Establishment of the Scientific Panel on Responsible Plant Nutrition

At IFA2019 in Montréal, IFA's Board of Directors decided to establish an independent group of distinguished scientists to provide expertise and advice to the fertilizer industry, as well as the broader community of stakeholders engaged with agrifood systems. The mission of this new international [Scientific Panel on Responsible Plant Nutrition](#) is to provide a sound scientific basis for principles and practices of responsible plant nutrition in farming systems.

Its inaugural meeting occurred in Versailles on 17 November, under the Chairmanship of Dr. Tom Bruulsema of IPNI Canada. In addition, IFA named Dr. Achim Dobermann as its new Chief Scientist. As of January 2020, Dr. Dobermann, a world-renowned soil and plant nutrition scientist, will manage the Scientific Panel.

Creation of a Nutrient Use Efficiency (NUE) dataset and NUE Country profiles

IFA's Agriculture Service developed a new NUE dataset for the exclusive use of its Members. This database covers 16 countries and 14 regional groupings with data on N output + Fertilizer-N input + manure-N input + BNF-N input + output/input ratio from 1961 to 2017. In total, the database contains more than 37k data points.

The Service also developed NUE country profiles for China, USA and Canada, and draft profiles for India, Brazil, Denmark and Nigeria that were included in a [paper](#) that IFA submitted to the UNFCCC's working group on Agriculture, ahead of its meeting at COP25. Through the analysis of these diverse country profiles, the paper provided policymakers with key learnings of factors that improved or hindered countries' nutrient management performance.

MARKET INTELLIGENCE

Following the retirement of Michel Prud'homme, IFA's Sr Director for Production and International Trade in June 2019, Marina Simonova became the Director of IFA's new Market Intelligence Service, which combines fertilizer supply and fertilizer demand analysis into one Service.

IFASTAT
Online platform for fertilizer statistics

In 2019, the Market Intelligence Service expanded the statistical coverage of [IFASTAT](#) with new Country factsheets, a new Visualization module with interactive chart functionalities and a new fertilizer converter tool. In addition, all Market Intelligence statistics and capacities reports published from July 2019 have been enhanced with elements of data visualization and analytics highlighting key trends.

IFA's Market Intelligence Service maintains and appreciates a constant dialogue with FAO Statistics Division, fertilizer producing companies, local fertilizer associations and industry experts globally to ensure the high quality of fertilizer statistics.

PUBLIC AFFAIRS

IFA engaged successfully in several UN Meetings of key relevance to the fertilizer industry, raising its profile and visibility of its engagements and actions:

- [UN Environment Assembly \(UNEA-4\), March 2019 in Nairobi](#): IFA and a delegation of members, headed by the Convenor of IFA's UN Outreach Group Tip O'Neill (IRM) raised the profile of the industry significantly by organizing a multi-stakeholder special event "Healthy Food for a Healthy Planet"; a lunch discussion co-organized with UN Environment, FAO, WHO and CropLife on "Innovative Actions Towards a Pollution-Free Planet"; co-sponsoring a High-Level Dinner with Ambassadors; and participating in the Science-Policy-Business Forum Closing Plenary Session.
- [In the margins of the High Level Political Forum in New York](#), a large IFA delegation composed of Nutrien, OCP, Olam and Fertilizer Canada under the leadership of Tip O'Neill participated in several bilateral meetings with Member State representatives, as well as the UN Assistant Secretary General and Head of UNEP's New York Office and the FAO representative in New York. IFA also co-organized a special "High-Level Lunch Debate for UN delegates with WFO, IFPRI and One Acre Fund.
- [COP25 - December 2019 in Madrid](#): IFA led a Member delegation composed of Yara, BASF, TFI and Fertilizer Canada to the UNFCCC's negotiations on agriculture, and assured their participation as speakers in three side events on agriculture. IFA intervened during the official Expert on the implementation of Nutrient Use Efficiency.
- In line with its objective to intervene in political debates and reports, IFA participated successfully in the development of the CFS Report on Agroecology, and provided inputs to the FAO proposal on the implementation of SDG Target 2.4.1 on the measurement of productive and sustainable agriculture. IFA started also to be fully engaged in consultations for the future UNEP Report on the Impact of Pesticides and Fertilizers on Human Health and the Environment (to be published in 2021).

In terms of new partnerships, IFA signed a MoU with the World Farmers Organization and joined the "Climakers", an initiative called to life by the WFO to increase the acknowledgement of farmers' role in the climate change agenda.



COMMUNICATIONS

IFA ran 11 communications campaigns throughout 2019, covering a variety of topics including among others precision agriculture, sustainable food systems, and soil carbon sequestration. A special emphasis was put on the 350th anniversary of the discovery of Phosphorus. For this occasion, IFA produced a film about Phosphorus management and released four infographics. These “Phosphorus Facts” were shared on IFA’s social media channels throughout the year.

IFA’s social media channels grew strongly in 2019, with over 5,000 new followers on LinkedIn (reaching 12,6k) and 2,046 more on Twitter (reaching 15k).



REGIONAL INITIATIVES

Africa

IFA joined the Abuja 2 Task Force launched by the African Union Commission (AUC), and attended its first meeting on 3 September in Accra, Ghana, at the margin of the 2019 African Green Revolution Forum. Contrary to the Abuja Summit held in 2006, which focused on fertilizers for an African green revolution, the scope of Abuja 2 will be broader, encompassing soil health in addition to fertilizers and assessing the progress of implementation since 2006 through a comprehensive review process, that will identify and promote success stories, agree on a comprehensive set of measures, agree on roles and responsibilities of the various stakeholders (with particular attention to the role of the private sector), and agree on strategies for post-summit actions.

IFA also participated in the Arab Fertilizer Association’s 25th Annual Forum and Exhibition in Cairo on 12-14 February. Charlotte Hebebrand presented a keynote address, which touched on many of the IFA2030 findings.

China

IFA Board members Rakesh Kapur (IFFCO) and Yves Caprara (Prayon) joined Charlotte Hebebrand and Volker Andresen for the Chinese Phosphate Association (CPFIA) meeting held in Beijing on 28-29 August, and the 2019 IFA China Consultative Group (CCG) meeting held on 27 August. The latter provided insights into the state of the Chinese industry, and opportunities to bring IFA publications and initiatives to the attention of our Chinese members. This discussion significantly contributed to the completion of a 5-year plan (2020-2025) for IFA’s China Initiative.

EECA

New services have been introduced in Russian for the EECA members and non-members to facilitate wider outreach in the region: (i) [a video about IFA](#); (ii) Medium-Term Market Outlook Summary report; (iii) Russian webpage updated and (iv) all SHE Benchmarks (Employee Safety Performance, Environmental Performance and Energy Efficiency & CO2 Emissions Benchmark) translated.

In February, Volker Andresen, IFA's Technical & SHE Committee Director, gave a presentation to 300 participants of the Central Asian Agrochemical Forum in Taraz, Kazakhstan on Fertilizer Consumption, Agricultural Production, and the Benefits of the 4R Principles. In September, Marina Simonova, IFA's Director of Market Intelligence Service participated in the regional fertilizer conference in Minsk, Belarus presenting the Medium-Term Market Outlook 2019-2023.

Latin America

IFA and ANACOFER co-organized a training workshop on fertilizer demand forecasting on January 28 in Mexico City, on the margin of the Fertilizer Latino Americano conference. The purpose was to train fertilizer market analysts and agronomists in fertilizer demand forecasting, with a focus on Mexico. At the FLA conference, Armelle Gruère made a presentation focusing on "Global Fertilizer Demand: Historic Trends and Medium-Term Expectations".

NEW IFA GENDER INITIATIVE



IFA incepted a Gender Diversity Task Force in September, following a highly attended special session on women in the fertilizer industry at the IFA2019 conference in Montréal, where women in leadership positions at Nutrien, OCP, Prayon, Incitec Pivot and CNAMPGC shared their views on their role in the industry, and the lessons they learnt along their professional paths.

The new IFA Taskforce is dedicated to raising awareness of women's achievements, increasing the visibility of particularly successful gender diversity initiatives and programs in the industry and communicating on the critical role of women for sustainable agriculture.

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 Beltaif**, Policy Analyst

Market Intelligence Service

- 7 **Marina Simonova**, Senior Director
- 8 **José de Sousa**, Program Manager: Supply
- 9 **Armelle Gruère**, Program Manager: Fertilizer Demand
- 10 **Virginie Couturier**, Senior Market Analyst - Phosphates
- 11 **Olivier Rousseau**, Senior Market Analyst - Potash & NPK
- 12 **Martin Sofer Inglesi**, Fertilizer Demand Analyst
- 13 **Sylvie Marcel-Monnier**, Project Coordinator

Technical and SHE Service

- 14 **Volker Andresen**, Director
- 15 **Lucia Castillo Nieto**, Technical Analyst

Communications & Public Affairs Service

- 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

- 25 **Florence Lambert**, Director
- 26 **Aurélien Palaric**, Senior Accountant
- 27 **Sylvain Rivière**, Accountant

IFA MEMBERSHIP

At the end of 2019, the number of members of the Association reached 445 covering 71 countries. The various categories of membership were represented as follows:

- **168** Ordinary members
- **171** Associate members
- **43** Correspondent members
- **63** Affiliate members

During 2019, 23 new members were elected as follows:

NEW MEMBERS

Ordinary Members

- Madras Fertilizers Limited (MFL) (India)
- INTERMAG (Poland)

Associate Members

- Brunei Fertilizer Industries Sdn Bhd (Brunei)
- ARKEMA France
- SAIPEM spa (Italy)
- Hexagon Group AG (Switzerland)
- TUV AUSTRIA TURK (U.A.E.)
- Grow Faster Ltd (United Kingdom)
- Kore Potash Plc (United Kingdom)
- BiOWiSH Technologies Inc. (United States)
- Crystal Peak Minerals (United States)
- Innovar Ag LLC (United States)
- Jiangnan Environmental Technology (United States)

Affiliate Members

- West Africa Fertilizer Association (WAFA) (Mali)
- Mohammed VI Polytechnic University (UM6P) (Morocco)
- Fertilizer Producers and Suppliers Association of Nigeria (FEPSAN)
- New York University (United States)

Correspondent Members

- Luis Ignacio Prochnow (Brazil)
- Pierre-Louis Froidure (France)
- Michel Prud'homme (France)
- David K. Massey (Pakistan)
- Michael R. Rahm (United States)
- Terry Roberts (United States)

RESIGNATIONS

There were 23 resignations during the year:

Ordinary Members

- JSC Gomel Chemical Plant (Belarus)
- Aglukon (Germany)
- Inkabor S.A.C. (Peru)
- Felcra Niaga Sdn Bhd (Malaysia)
- Terragro Fertilizer Co Ltd (Thailand)

Associate Members

- Agrow Australia Pty Ltd (Australia)
- Schoeller-Bleckmann Nitec GmbH (Austria)
- s.a. SNC-Lavalin n.v. (Belgium)
- Comexport (Brazil)
- China Leon Inspection Holding Ltd (China P.R.)
- DuPont OCP Operations Consulting (Morocco)

- Verbrugge Terneuzen Terminals B.V. (The Netherlands)
- Agven Private Ltd (Pakistan)
- Kropz SA (Pty) Ltd (South Africa)
- NF Trading (Switzerland)
- Chia Tai Company Ltd (Thailand)
- Kalyaan Resources DMCC (U.A.E.)
- Lushbury Fertilizer Corp. (United States)
- Plant Survey International (United States)
- Vinh Thanh Trade Co. Ltd (Vietnam)

Correspondent Members

- Bjarne Christensen (Denmark)
- E. Drilhon (France)
- Ralph Thawley (United Kingdom)

NAME CHANGES

Ordinary Members

- K+S Kali GmbH (subsidiary of K+S AG) has been merged into a new company under the name of K+S Minerals and Agriculture GmbH.

Associate Members

- **BHP Billiton** (Canada) has changed its name to BHP Group
- **Jacobs Engineering Group Inc.** (United States) now operates under the name of Worley (following the acquisition of Jacobs ECR division by Worley, Australia)

OTHER CHANGES

Ordinary Members

- Kailin Group Co. Ltd and Wengfu Group Co. Ltd (China P.R.) both IFA members have merged and have become subsidiaries of Guizhou Phosphate & Chemical Group Co Ltd

- The membership of Omex Agriculture Ltd (United Kingdom) has been transferred to Omex Group to include all fertilizer divisions.



Associate Members

- **ITAFOS** (Cayman Islands/United States) now operates several phosphate fertilizer plants in addition to the projects under development and its membership has been transferred to the Ordinary category.
- The membership of **Louis Dreyfus Company (Switzerland)** has been taken over by **Louis Dreyfus Company Brasil S.A.**
- The membership of **Mediterranean Fertilizers Company SAL Offshore** (Lebanon) has been transferred to its subsidiary **Mediterranean Fertilizers Industry (MSIFCCO)** in Egypt.
- The membership of **Yingkou Magnesite Chemical Ind Group Co (Sinomagchem)**, China P.R. has been transferred to the Ordinary membership category to take into account its production activity.
- Following a change in the classification of member companies involved in activities in the field of micronutrients, the membership of **AB Etiproducts Oy (Finland)** and **Rio Tinto US Borax Inc. (United States)** (membership formerly held by Rio Tinto Minerals, UK) has been shifted to the Ordinary category.

Affiliate Member

- The International Plant Nutrition Institute (IPNI) was dissolved in December 2018 and its scientific assets and programs have been transferred to The Fertilizer Institute (TFI), Fertilizer Canada and IFA.

Correspondent Member

- We have been informed of the passing of Dr Ricardo Melgar (Argentina), in February 2019.

MEMBERSHIP TERMINATION

Ordinary Members

- Hengshui Hengji Agricultural Material Co., Ltd (China P.R.)
- M/S Matix Fertilisers & Chemicals Limited (India)
- Nagarjuna Fertilizers & Chemicals Ltd (India)
- Tengizchevroil LLP (Kazakhstan)

Associate Members

- Potassio do Brasil Ltda (Brazil)
- Jiangsu Right Machinery Group Co. Ltd (China P.R.)
- State Trading Corporation of India Ltd (India)
- LLC "K-Potash Service » (Russian Federation)
- Saudi Specialty Chemical Industries Co. Ltd (Saudi Arabia)
- Bary Chemical Pte, Ltd (Singapore)
- Chaketma Phosphates S.A. (Tunisia)
- AVAgro LLC (United States)

Correspondent Member

- Mr Khaled Tataï (Algeria)
- Mr Garry L. Pigg (United States)
- Mr Harvey M. Goertz (United States)
- Mr Eben Mabibi Makonese (Zimbabwe)

ELECTIONS IN 2019

BOARD MEETING

on 13 June 2019

Board

- Chairman, Technical & SHE Committee: Mr Yves Caprara
- The mandate of Mr Dmitry Konyaev, Chairman, Communications & Public Affairs Committee was extended until November 2020

Executive Board

- Chairman, Finance Committee: Mr Svein Tore Holsether

BOARD MEETING

on 20 November 2019

Executive Board

- The term of Mr Zhai Jidong, Kingenta, China P.R. was renewed for another two years.
- Given the tremendous contribution Mr Rakesh Kapur had made to IFA over the years and to ensure a strong Indian presence on the Executive Board, his mandate as Immediate Past Chairman was extended until May 2021.

GENERAL MEETING

on 13 June 2019

Board

- West Asia : Mr Raviv Zoller, ICL, Israel

Executive Board

- IFA Chairman: Mr Mostafa Terrab, OCP, Morocco
- Immediate Past Chairman: Mr Rakesh Kapur, IFFCO, India
- Vice Chairman: Mr Chuck Magro, Nutrien, Canada

GENERAL MEETING

on 20 November 2019

Board

- East Asia: Mr Shamsairi Mohd Ibrahim, Petronas, Malaysia

The mandate of the following Board members was renewed for another two years:

- **Latin America:** Mr Daniel Pettarin, Profertil, Argentina
- **South Asia:** Mr Manoj Mishra, NFL, India

PAST ANNUAL CONFERENCES

2010-2019

2019 Montreal	2018 Berlin	2017 Marrakech	2016 Moscow	2015 Istanbul
2014 Sydney	2013 Chicago	2012 Doha	2011 Montreal	2010 Paris

2000's

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

1990's

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

1980's

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

1970's

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

1960's

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

1950's

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

1940's

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

1930's

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

1920's

1929 Vienna	1928 Stockholm	1927 Hamburg
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PAST PRESIDENTS

2017-19

R. Kapur

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

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

FINANCE

In 2019, total operating income was at the level of 2018 and reached some €9.53 million. Revenue from subscriptions was slightly higher than the previous year but this additional income was offset by a decrease in revenue from conferences and meetings. The sponsorship settled by several member companies in 2019 amounted to about €1.02 million, representing more than 27 per cent of the income from conferences and meetings.

Operating expenditures remained stable compared to 2018 and reached some €9.59 million. The most important changes in 2019 concerned several areas of expenditure, of which the organizational costs of the conferences and meetings, which were higher than the year before. However, revenue from sponsorship offset a large part of these additional costs. Furthermore, savings made in several budget items, of which the external consultancy fees and the sustainable fertilizer partnership programme allowed to balance the overall expenditures. All in all, an operating deficit of €55,300 was recorded in the accounts for 2019.

Referring to financial activity, the year ended with a surplus of some €212,000, stemming from the positive outcome in fair value of investments at the end of 2019. This situation was due to the slow improvement of the financial markets through out the year, which permitted to offset the depreciation on the IFA financial instruments recorded at the end of 2018. Income from investments remained very low due to the poor performance on three short-term instruments in euros and one investment with a guaranteed capital.

In summary, the year 2019 ended with a surplus of about €93,000, whereas as a deficit of some 142,000 was recorded in 2018.

Details of the Association's financial situation in 2019 are provided in the "Audited Accounts at 31 December 2019" attached to the Annual Report.