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Argus Added Value Fertilizers Europe eBook

Industry infographics and interviews

Brought to you by the Argus Added Value Fertilizers Europe conference



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Dale Edgington

Committee Chair

Micronutrient Manufacturers Association

Speaker bio:

Dale Edgington gained his BS degree in Agricultural Economics from Michigan State University and began his career in the fertilizer industry in 1985. He spent the first half of his career in retail operations, marketing fertilizers, pesticides, seeds and related services to farmers in Michigan.

In 2003, Dale transitioned to the micronutrient fertilizer manufacturing business, working for Advanced Micronutrients Products, where he has been ever since. His responsibilities include purchasing and formulating various fertilizer products with the elements nitrogen, phosphorous, potassium, calcium, magnesium, manganese, copper, boron, iron and zinc.

Join the debate and pose your questions to Dale at the Argus Added Value Fertilizers Europe conference, where he will be on a panel discussing the importance of individual minerals in the production of high value crops in Europe.

What do you think is the biggest area for growth in the added value fertilizer market?

The recognition that micronutrients are being depleted by increasing yields has garnered attention in both the media and at conferences. This raised awareness has caused distributors to review the product offerings in their marketing mix. They seek to find products that benefit not just the grower but allow them to differentiate their offerings from those of their competitors. Each will look for the opportunity to do more with less (enhanced efficiency). These factors will increase the movement away from commodity products and into unique, branded or proprietary products.

"Nutrient management becomes more complex as nutrients stratify in the soil, but reduced environmental losses leads to higher yields."

What current and emerging trends do you see giving the markets an upside in 2020?

Slight strengthening in the oil complex will increase the prices received for oil seeds, increasing the demand for the inputs required to grow them. The political pressure to end multiple trade wars will enable the agricultural commodities market to establish regular trading patterns and allow commodities to move from areas of excess to deficit, improving pricing in the areas where they are produced.

What current and emerging trends could create downside in 2020?

Increasing nationalism could hamper trade along traditional routes.

How will the drive for more sustainability and creating less impact on the environment affect the market?

Reduced tillage increases carbon sequestration and ultimately leads to more sustainable yields. Nutrient management becomes more complex as nutrients stratify in the soil, but reduced environmental losses leads to higher yields.

What are your expectations for the next 2-5 years?

The North American and European markets are mature. The greatest growth in demand will occur outside of these geographies. There will be continuing innovation in technologies that improve site specific management of resources in the mature markets that will increase efficiency without increasing overall demand for product.

What do you hope to gain from attending Argus Added Value Fertilizers 2020?

We have customers in the region who we will spend time with, as well as seeking new opportunities for growth. I haven't gone to a conference yet where I haven't found at least one new customer or supplier.

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Rasmus Roeder

Sales and Marketing Manager,
Northern and Eastern Europe
Lebosol Dünger

Speaker bio:

Rasmus holds a degree in Agronomy from the University Martin Luther of Halle-Wittenberg and has been working in the agriculture industry in Europe (e.g. BASF SE and K+S Kali) for more than 16 years. He also has a long track record within Lebosol, turning trends into products for more than 10 years. Rasmus now works as a sales and marketing manager for northern and eastern Europe.

Hear more from Rasmus Roeder at Argus Added Value Fertilizers Europe conference in a panel on the importance of individual minerals in the production of high value crops in Europe.

What do you think is the biggest area for growth in the added value fertilizer market?

More focus on “specialities”. A new trend could be the coating of standard fertilizer with microelements. Furthermore, we see more efforts to fight climate change, reducing plant stress by optimising nutrition. Another area of development will be additional seed treatment with microelements.

What current and emerging trends do you see giving the markets an upside in 2020?

Seed treatment with microelements, optimised nutrition and N utilisation, and new regulations and limitations of nitrogen. More balanced fertilization for optimised and stabile yield.

What current and emerging trends could create downside in 2020?

Poor crop price and the escalation of world trade sanctions.

"A new trend could be the coating of standard fertilizer with microelements. Furthermore, we see more efforts to fight climate change, reducing plant stress by optimising nutrition."

How will the drive for more sustainability and creating less impact on the environment affect the market?

Focus more on balanced nutrition for stabile and optimized yield (not more focus on highest yield). Reduction of N- surplus, focus on better utilisation (sulphur, microelements).

Reducing in crop protection (fungicides) by optimising nutrition (“plant health”).

What are your expectations for the next 2-5 years?

Further growth in “new markets” – e.g. seed treatment, coating of standard fertilizer with microelements, optimising nutrition with microelements in order to reduce crop protection

(stabile and healthy plants are less susceptible against diseases and abiotic stress).

What do you hope to gain from attending Argus Added Value Fertilizers 2020?

Networking, exchanging information and getting a better insight into the added value fertilizer market

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Dr Muhammad Imran

Technical Development Manager Micronutrients
Ethylene and Sulphur Derivatives

Nouryon

Speaker bio:

Dr. Muhammad Imran joined Nouryon in 2019, as a Technical Development Manager for chelated micronutrients. At Nouryon, he is responsible for developing micronutrients R&D collaborations with external research organizations, adding values to chelated micronutrients by using biostimulants, trainings for the distributors and consumers around the world on the use of chelated micronutrients in agriculture with different application methods. In fertilizer industry, he started his career at Yara International as a research scientist, responsible for developing Biostimulants in combination with micronutrients for all crop segments and application methods e.g. coatings, foliar and fertigation. Dr. Imran have MSc and PhD in plant nutrition from Institute of Plant Nutrition at the University of Hohenheim, Stuttgart, Germany. He has also worked as postdoc. researcher at Aarhus University, Denmark and Kiel University, Germany.

What do you think is the biggest area for growth in the added-value fertilizer market?

With respect to crops, climatic conditions and soil-specific needs in different regions, a tailored addition/combination of micronutrients and biostimulants will increase the value of NPK fertilizers to achieve higher yields and crop quality. At the same time, the market growth of value-added fertilizers is great for high-value crops such as fresh fruit and vegetables.

What current and emerging trends do you think will give the markets an upside in 2020?

Farmers are showing great interest in learning about new fertilizer technologies. Fertilizer companies are investing more in research and development to develop value-added fertilizer to provide the best crop solutions to farmers.

What current and emerging trends could create downside in 2020?

- Availability of lots of non-approved and low-quality products in the market.
- Less training and awareness campaigns for farmers and technical staff.
- Compromising quality over price.

How will a drive for more sustainability and a lower impact on the environment affect the market?

Considering the food demands of a rapidly growing world population, sustainability and creating less impact on the environment is and will be very region specific. For example, in Europe, sustainability and protection of the environment is one of the key drivers for developing new value-added fertilizers compared with Asia or Africa, where having more food is the priority.

What are your expectations for the next two to five years?

- Enhanced farmers' knowledge.
- More environmentally friendly fertilizers.
- Development and increased usage of value-added fertilizers to improve crop yields and quality.

What do you hope to gain from attending Argus Added Value Fertilizers 2020?

I am looking forward to meeting more people in the fertilizer industry and learning about new fertilizer technologies. Furthermore, to understand how and if we can find synergies between different technologies to develop more high-value fertilizers for farmers.

"Fertilizer companies are investing more in research and development to develop value-added fertilizer to provide the best crop solutions to farmers."

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Michael Lassen

Sales Manager Europe, Plant Nutrition

Compass Minerals

Speaker bio:

For the past 11 years Michael has worked in the European micronutrient business, first with Wolf Trax (from Canada) and the past 4 years with Compass Minerals (from USA). This background has provided Michael with a good knowledge of distribution & agricultural practices within micronutrients across various areas of Europe. Michael started his career teaching agricultural -and environmental sciences at the Technical College of Holstebro (Denmark), he then moved to primary production of fruits and berries for the Danish Home market - before joining his current employment within the European micronutrient industry.

Join Michael in a debate on demand forecasts and opportunities for AVFs in Europe when he sits on a panel at the Argus Added Value Fertilizers Europe conference.

What do you think is the biggest area for growth in the added-value fertilizer market?

Increasing NUI (nutrient use efficacy) and reducing losses to the environment represents a significant area of growth for added-value fertilizers. A current very strong trend towards reduction of greenhouse gas emissions will likely only accelerate over the years to come, and value-added fertilizers have an important role to play in finding solutions.

What current and emerging trends do you see giving the markets an upside in 2020?

In 2020, the northern EU is facing regulatory constraints on P-input, on the use of non-protected urea and on some seed applied chemical molecules. All of these regulatory restrictions are forcing the market to find alternative solutions — value-added fertilizers (micronutrients and biostimulants) are one direction to go.

What current and emerging trends could create downside in 2020?

Low commodity pricing and fertilizer [oversupply] can be a challenge to added-value fertilizers.

How will a drive for more sustainability and a lower impact on the environment affect the market?

I believe the market for value-added fertilizers will benefit tremendously from a drive for sustainability — more attention to precision farming, soil testing and prescription fertilizers, combined with different technologies from the added-value portfolio, will be an important driver to reduce the footprint without yield and quality losses.

What are your expectations for the next two to five years?

More interest and growth.

What do you hope to gain from attending Argus Added Value Fertilizers 2020?

I hope to get new contacts on the European market for Compass Minerals' added-value propositions.

"I believe the market for value-added fertilizers will benefit tremendously from a drive for sustainability"

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Markus Schmid

Head of N Business Management

BASF

Speaker bio:

After earning his PhD in chemistry, Markus joined BASF as a Lab Team Leader in polymer research in 2000. After assignments in R&D, corporate strategy and project management, he took over responsibility for the N management business (is this right?) at BASF's Agricultural Solutions division.

You can hear more from Markus at the Argus Added Value Fertilizers Europe conference, where he will be discussing the German implementation of urease inhibitors in a panel debate.

What do you think is the biggest growth areas in the Added Value Fertilizer market?

These are Europe, China and Brazil. While in Europe the biggest driver is to limit the environmental impact of fertilizers, in Brazil and China the drivers are labour efficiency, higher yield and quality of crops.

What current and emerging trends do you see giving the markets an upside in 2020?

As mentioned, in Europe there are trends to limit the impact of emissions of fertilizers. The emissions are related to three categories: nitrates in waterbodies, ammonia in the air and nitrous oxide emissions. In general, nitrogen stabilisers are an easy-to-implement tool in addition to the 4R nutrient stewardship. Thus, urease inhibitors and nitrification inhibitors will see fast growth in the next years. As you know, in Germany it will be mandatory in 2020 to either soil-incorporate urea or use a urease inhibitor.

What current and emerging trends could create downside in 2020?

A big downside is the general ambiguity around global trade due to the increasing protectionism. It became very difficult to forecast what will happen, leading to a delay of investments and decisions to purchase fertilizers. The supply chain might just run out of time to implement treatment capacities for value-added fertilizers for the upcoming season.

How will a drive to increase sustainability and reduce impact on the environment affect the market?

The market could become potentially very big for value-added fertilizers. The discussion about climate change brings in a new dimension. It could be that we don´t talk about value-added fertilizers in five years anymore, because they became the new standard.

What are your expectations for the next 2-5 years?

My expectation is that some players will adapt their strategies and drive the adoption of value-added fertilizers. I see this already happening, as big fertilizer manufacturers regard the environmental discussion not as a threat but as an opportunity to shape the market.

What do you hope to gain from attending Argus Added Value Fertilizers 2020?

I hope to meet colleagues in the fertilizer industry, exchange on trends and just be inspired by the group.

" The market could become potentially very big for value-added fertilizers"

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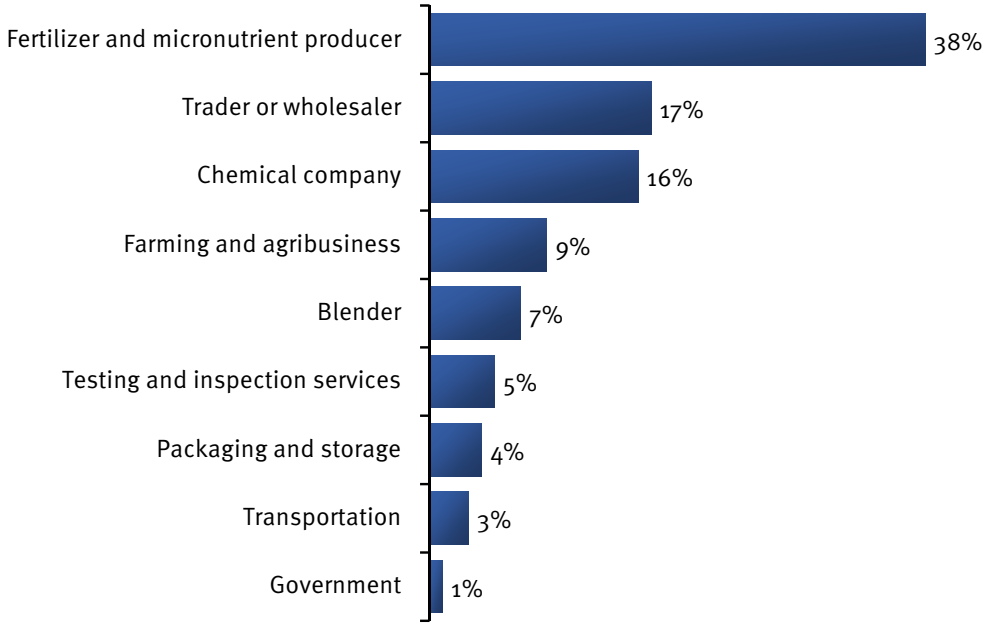
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Argus industry survey results on added value fertilizers in europe: Opportunities and challenges in 2019 and beyond



Q1 Company type of survey participants



Q2 Which regions are you facing challenges expanding into and why?

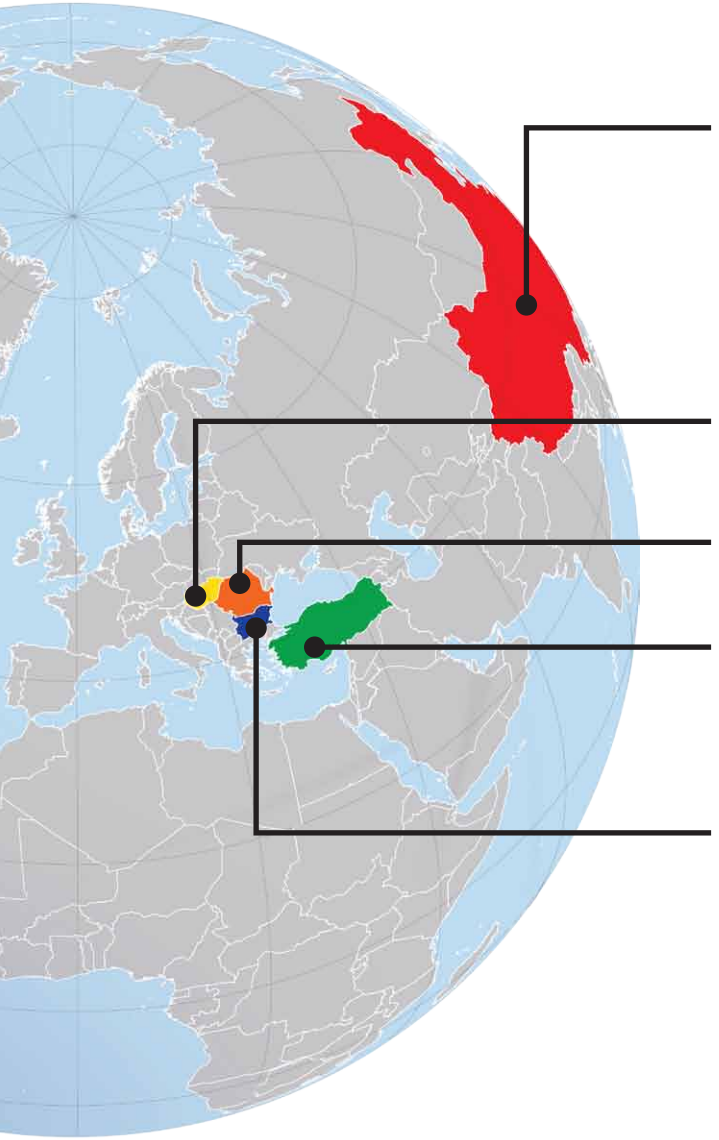


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Country challenges



China

Political barriers, competitive on pricing

Hungary

Very strict procedures and no flexibility from the authorities

Romania

Great opportunities

Turkey

100% price driven

Bulgaria

Infrastructure in ports and transport sector is in very bad condition.

Regional challenges

"**All regions** are challenging. New product introduction never easy and various country regulation obstacles need to be overcome."

"**USA, South America, Russia** hard competition"

"**Africa** - huge territory with still opened development possibilities"

"**Europe** - stringent legislation"

"**ASEAN region**, because of a) farmers are not aware about stabilized fertilizers and their benefits and b) the market structure is non-consolidated in general"

"**Africa and South America**, due to expensive and long-winded registration processes"

"**Africa** is not ready for specialty fertilizers yet. Very limited and slow growth"

"**Europe** due to new regulations in fertilizers, climate change and environmental regulations"

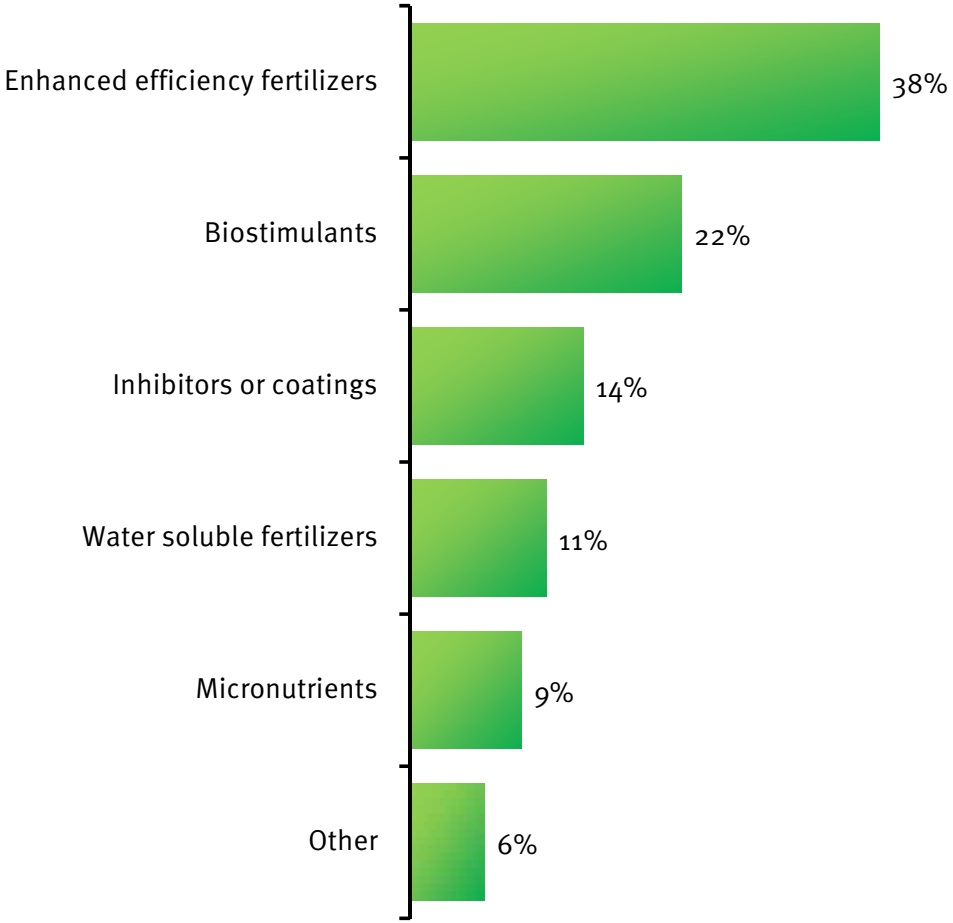
"Expanding in **Asia** due the different requirements of the markets."

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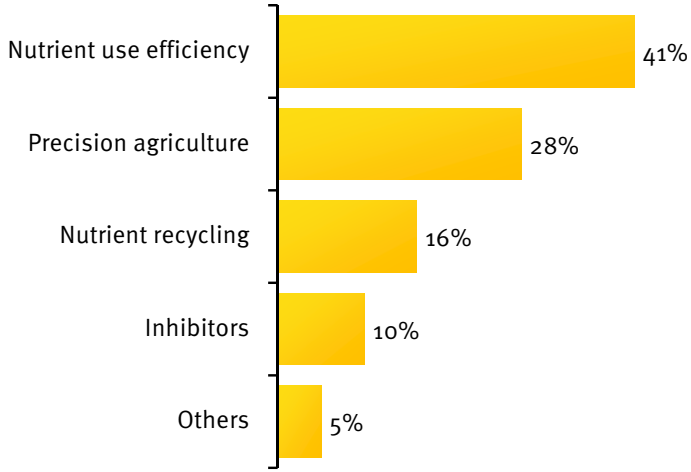
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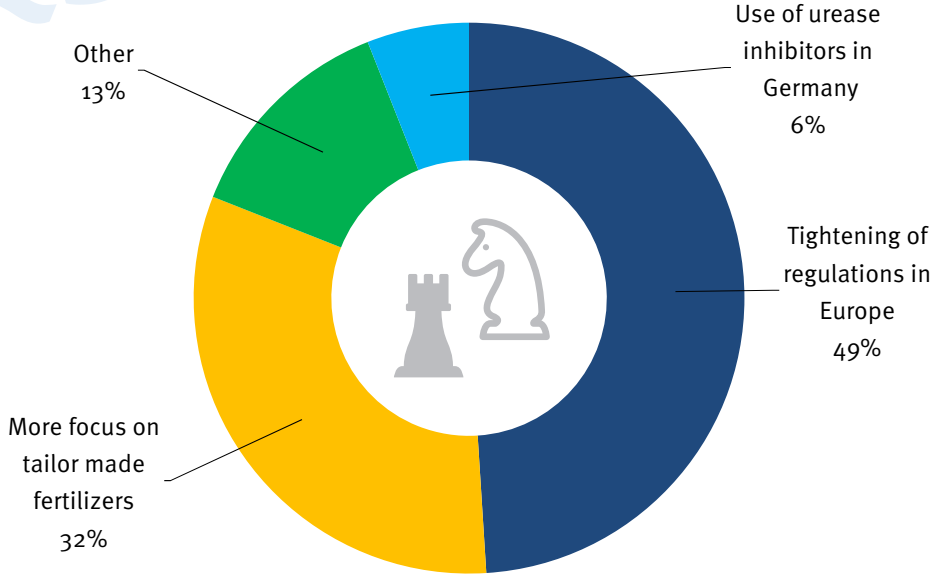
Q3 What do you think is the biggest area for growth in the Added Value Fertilizer market?



Q4 Which area of innovation do you believe holds the most potential?



Q5 What industry development will have the largest influence on your organisation's strategy for 2020 and beyond?

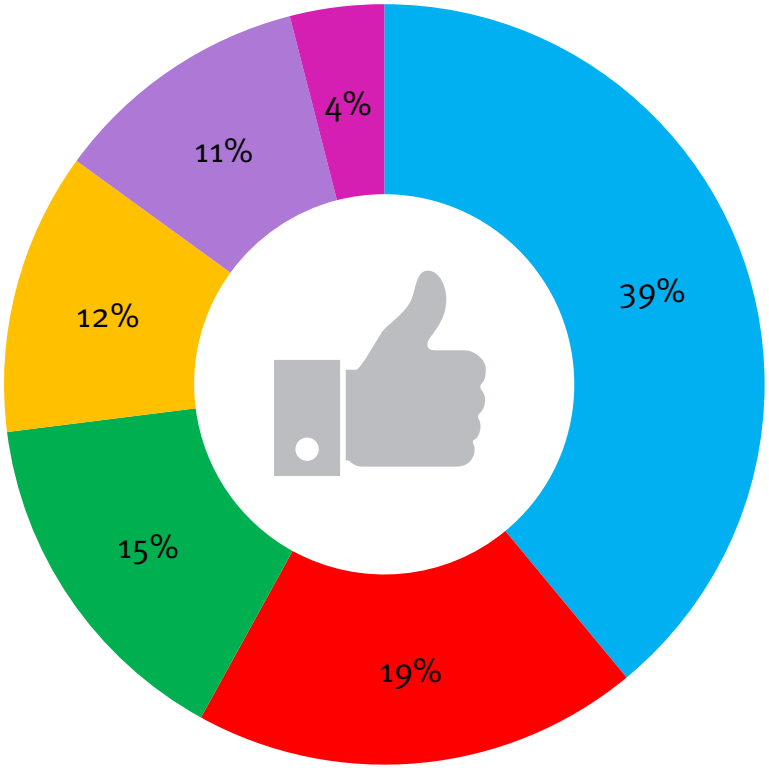


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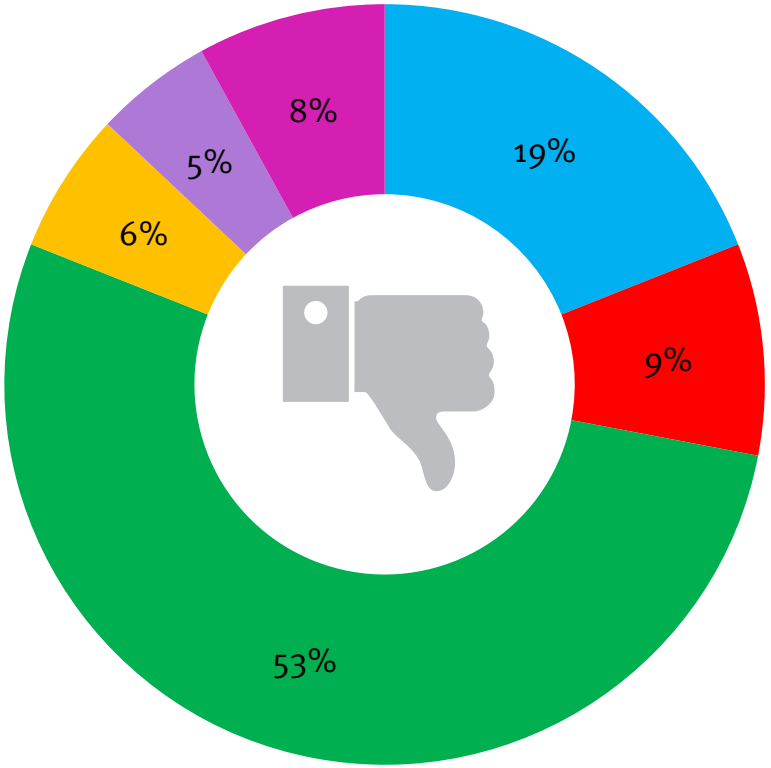
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Q6 What current and emerging trends do you see giving the market a upside in 2020?



Q7 What current and emerging trends do you see giving the market a downside in 2020?



Sustainability
Nutrient recycling
Regulation
Foliar fertilizers
Inhibitors
Other

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Q8 What are your expectations for the next two to five years?

"Crop planting decrease will lower demand in the short term. Crops will need to be grown by increasing the efficiency of fertilizers"

"More precision agriculture, more sustainable sourced fertilizers, more biostimulants"

"Increase need for sustainably produced fertilizers and addition of micronutrients"

"An increase in special fertilizers and biostimulants. Integration among crop protection and crop nutrition"

"An increase in special fertilizers and biostimulants. Integration among crop protection and crop nutrition"

"An uprise for specialised, sustainable and precision agriculture products."

"Increased availability of agro inputs especially foliar fertilizers and biostimulants"

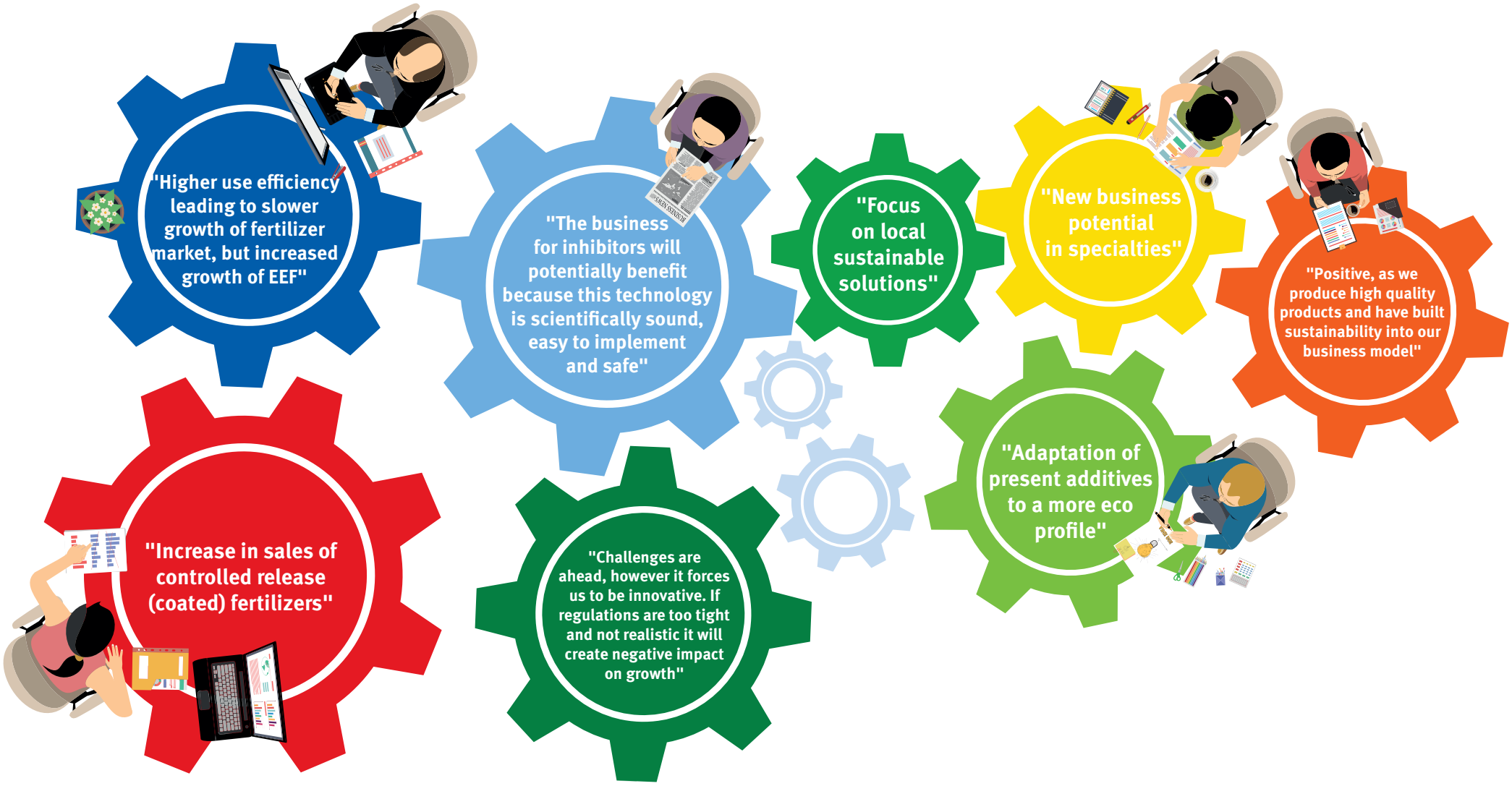
"Inhibition of Nitrogen will be more on the focus, biostimulants will be also in focus while conventional application will be reduced slightly"

"Growth in specialty fertilizers and recycling of nutrients"

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Q9

How will a drive for more sustainability and creating less impacts to the environment affect the market and your business?



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