# Argus Fertilizer Europe Conference

20-22 October 2026 | Hilton Prague, Prague, Czech Republic

illuminating the markets®

# Innovation guide



www.argusmedia.com/fertilizer-europe

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# The conference

## Now in its 38th year, the Argus Fertilizer Europe Conference is the largest and most established commercial networking event for the fertilizer markets.

With decades of proven value, it is a trusted platform where the industry comes together to build relationships, exchange insight, and drive business forward.

As geopolitical shifts, supply chain disruption, pricing volatility, and affordability pressures reshape the market, the need to connect and plan has never been greater.

Fertilizer Europe brings together senior decision makers, traders, producers, agronomy experts, and service providers for three days of high-value networking and market engagement. It is where the industry meets to navigate uncertainty, strengthen partnerships, and stay ahead in a rapidly evolving landscape.

**Plan your conference experience:** the Main Stage and Innovation stage agendas are on pages 27-30



# Spotlight on innovation

## As the industry adapts to mounting pressures and long-term transformation, innovation has never been more critical.

From improving efficiency and sustainability to enhancing product performance and supply chain resilience, new technologies and approaches are reshaping every stage of the fertilizer value chain.

Across areas such as specialty fertilizers, additives, biostimulants, and digital and AI-driven solutions, innovation is driving measurable change and unlocking new opportunities for growth.

Recognising this shift, the conference places a sharper focus on forward-thinking ideas and the businesses leading them - creating space for the industry to engage with the solutions that will define its future.



# The seven core innovation domains

## To reflect the breadth of innovation shaping the fertilizer industry, we have grouped our exhibitors and sponsors into a series of innovation domains.

These domains have been carefully defined to cover the full fertilizer value chain - from production and inputs through to distribution, logistics, and enabling technologies. Together, they provide a clear and structured view of where innovation is happening and how different solutions connect across the industry.

By labelling companies within these domains, we make it easier to identify relevant partners, discover new technologies, and navigate the exhibition with purpose - helping you focus on the areas most important to your business.



### Fertilizer Production & Manufacturing

How fertilizers are produced more efficiently, reliably, and sustainably at plant level.



### Trading, Distribution, and Market Access

Innovation in how fertilizers are traded, marketed, and moved across regional and global markets.



### Equipment & Engineering

The technologies, plants, and engineering solutions that enable modern fertilizer production and processing.



### Packaging, Handling & Logistics

Solutions that protect product quality and improve efficiency across storage, handling, and transportation.



### Specialty & Advanced Fertilizers

Product innovation focused on performance, nutrient efficiency, and differentiated fertilizer formulations.



### Fertilizer Inputs, Additives & Ingredients

Nutrient inputs, chemical additives, and functional ingredients used to enhance fertilizer products.

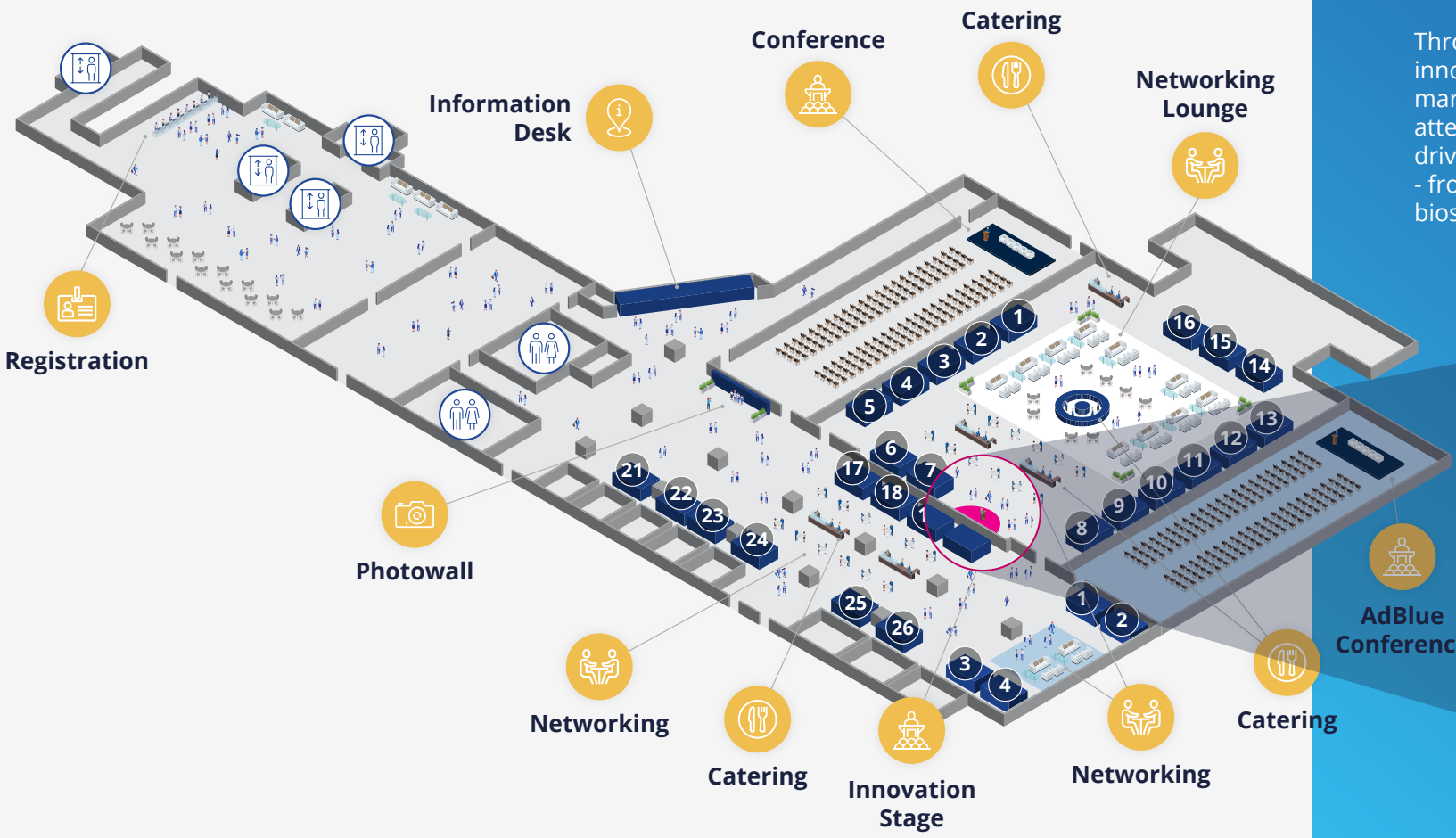


### Enabling Solutions & Emerging Technologies

Cross-cutting technologies and new approaches that support transformation across the fertilizer value chain.

# Your exhibition floorplan and innovation stage

**Plan your conference experience:**
the Main Stage and Innovation stage agendas are on pages 27-30




## Innovation Stage

The Innovation Stage is a new addition to the Fertilizer Europe Conference, bringing forward-thinking ideas to the forefront.

Located at the heart of the exhibition floor, it runs alongside the main agenda at carefully selected times, giving attendees greater choice of content and a more dynamic experience.

Through fast-paced sessions, the innovation stage will showcase practical, market-ready solutions and connects attendees directly with the companies driving innovation across the value chain - from specialty fertilizers and additives to biostimulants and AI-driven technologies.



# Your sponsors and exhibitors

## Diamond Sponsor

AGF Nitrogen

## Platinum sponsor

MAADEN

## Gold sponsor

OCP NUTRICROPS

## Silver Sponsors

70th Cielle Anniversary Sustainable packaging solutions

DELSO Nourishing the future

GG TRADING

PUREFERT GROUP Pure Fertilizers for Healthy Crops

YNFERT YUNNAN YINGFU

## Bronze Sponsors

AGROPOLYCHIM

BAGTECH Fertilizer Management And Handling Solutions

CF

HENGJI CHINA

mgi

REGREEN

SusPhos

thyssenkrupp

VERIDAPT

## Exhibitors

AGI From field to future

ALKIM

CBAMBOO

FERTIPAQ Natural Solutions

FERTINAGRO BIOTECH

GOLDMANN

Interjute

Köppern

Prospero·ag

NCCM

RETORTE

Royal EMT

RS Trading

Sinomagchem

VATERIS

## Research partner

Czech University of Life Sciences Prague

# Your 2026 sponsors and exhibitors

## Grouped by innovation domain

### Trading, Distribution, and Market Access

- AGF Nitrogen
- GG Trading
- Maaden
- Purefert trading
- Yunnan Yingfu Trading

### Fertilizer Production and Manufacturing

- AGF Nitrogen
- Agropolychim
- Fertinagro
- Hengji China
- Maaden
- The Köppern Group, Euragglo and Köppern

### Equipment & Engineering

- AGI Fertilizer Systems
- EMT – Blending and Bagging
- The Köppern Group, Euragglo and Köppern

### Packaging, Handling & Logistics

- AGI Fertilizer Systems
- Bagtech
- Cielle
- EMT – Blending and Bagging
- Interjute

### Specialty & Advanced Fertilizers

- Alkim
- Fertinagro
- Reploid

### Fertilizer Inputs, Additives & Ingredients

- Alkim
- Bestwin
- Goldmann
- Nanchang Changmao New Material Co Ltd (NCCM)
- Neelam Aqua
- Sinomagchem
- SusPhos

### Enabling Solutions & Emerging Technologies

- Prospero
- Reploid
- SusPhos

# Your 2026 sponsors and exhibitors

## Listed A–Z

| Company | Primary Category | Secondary Category |
|---|---|---|
| Achempak UAB | Packaging, Handling & Logistics | — |
| AGF Nitrogen | Fertilizer Production & Manufacturing | Trading, Distribution, and Market Access |
| AGI Fertilizer Systems | Fertilizer Equipment, Engineering & Manufacturing | Material Handling, Production & Manufacturing |
| Agropolychim | Fertilizer Production and Manufacturing | — |
| Alkim | Specialty & Advanced Fertilizers | Fertilizer Inputs, Additives & Ingredients |
| Bagtech | Packaging, Handling & Logistics | — |
| Bestwin | Fertilizer Inputs, Additives & Ingredients | — |
| CBAMBOO | Enabling Solutions & Emerging Technologies | — |
| CF Industries | Fertilizer Production & Manufacturing | Trading, Distribution, and Market Access |
| Cielle | Packaging, Handling & Logistics | — |
| Czech University of Life Sciences | Enabling solutions & emerging technologies | Specialty & advanced fertilizers |
| Delso | Fertilizer Production & Manufacturing | — |
| EMT – Blending and Bagging | Equipment & Engineering | Packaging, Handling & Logistics |
| Fertiglobe | Fertilizer Production & Manufacturing | Trading, Distribution, and Market Access |
| Fertinagro | Specialty & Advanced Fertilizers | Fertilizer Production & Manufacturing |
| Fertipaq | Packaging, Handling & Logistics | Equipment & Engineering |
| GG Trading | Trading, Distribution, and Market Access | — |
| Goldmann | Fertilizer Inputs, Additives & Ingredients | — |
| Hengji China | Fertilizer Production and Manufacturing | — |

# Your 2026 sponsors and exhibitors

## Listed A–Z

| Company | Primary Category | Secondary Category |
|---|---|---|
| Interjute | Packaging, Handling & Logistics | — |
| Maaden | Fertilizer Production & Manufacturing | Trading, Distribution, and Market Access |
| Midgulf | Trading, Distribution, and Market Access | — |
| Nanchang Changmao New Material Co Ltd (NCCM) | Fertilizer Inputs, Additives & Ingredients | — |
| Neelam Aqua | Fertilizer Inputs, Additives & Ingredients | — |
| OCP Nutricrops | Fertilizer Production & Manufacturing | — |
| Prospero | Enabling Solutions & Emerging Technologies | — |
| Purefert Trading | Trading, Distribution, and Market Access | — |
| Reploid | Specialty & Advanced Fertilizers | Enabling Solutions & Emerging Technologies |
| Retorte GmbH | Specialty & Advanced Fertilizers | — |
| RS Trading | Trading, Distribution, and Market Access | — |
| Sinomagchem | Fertilizer Inputs, Additives & Ingredients | — |
| SusPhos | Enabling Solutions & Emerging Technologies | Fertilizer Inputs, Additives & Ingredients |
| The Köppern Group / Euragglo / Köppern | Equipment & Engineering | Fertilizer Production and Manufacturing |
| thyssenkrupp Uhde | Equipment & Engineering | — |
| Vateris | Specialty & Advanced Fertilizers | — |
| Veridapt | Enabling Solutions & Emerging Technologies | — |
| Yunnan Yingfu Trading | Trading, Distribution, and Market Access | — |

# From innovation themes to real-world perspectives



## In the previous section, we introduced the innovation domains shaping this year's conference – reflecting the areas where the industry is evolving and where our partners are focusing their efforts.

But innovation is not just defined by themes. It is driven by the real challenges organisations are navigating every day.

To bring these themes to life, we asked our sponsors and exhibitors to share their perspective. What challenges are being overlooked or underestimated? And how are these challenges shaping the way organisations think, invest, and operate?

The following pages present their responses - offering a direct view into how companies across the value chain are interpreting and responding to change.

### How to read this section

Each organisation has answered two key questions:

- **What is the most underestimated challenge facing the industry today?**
- **How is this shaping their priorities and decisions?**

Together, these perspectives connect the innovation domains introduced earlier with the actions being taken across the industry.

AGF Nitrogen

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

The most underestimated challenge is the combined cost impact of ETS and CBAM. Decarbonisation is essential, but reducing emissions requires significant investment, while downstream value chains are not yet willing or able to absorb these additional costs to a sufficient extent.

At the same time, CBAM does not yet consistently follow carbon-intensive value chains into downstream products. This can create competitive distortions where carbon costs are incurred within European production chains, while competing imported downstream products may not face an equivalent carbon cost.

The consequences extend well beyond fertilizer producers. As carbon costs rise, they will increasingly flow through to farmers, putting further pressure on farm incomes and the competitiveness of European agriculture.

We want to keep production in Europe. But if rising regulatory and decarbonisation costs contribute to deindustrialisation, Europe risks import dependence and weaker food sovereignty. This makes a reform of ETS and CBAM increasingly difficult to avoid.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

The growing cost of carbon is changing how AGF Nitrogen assesses competitiveness, investment and long-term production in Europe. We recognise that decarbonisation is necessary, but it comes at a significant cost that cannot simply be passed on to customers and farmers.

We are therefore focusing on improving energy and resource efficiency, reducing emissions, modernising assets and creating greater operational synergies across our European companies. At the same time, we are assessing how future carbon costs could influence production, sourcing and trade flows.

Our objective is clear: to support the decarbonisation of European fertilizer production while maintaining a viable industrial base in Europe. Achieving both will require investment by industry and a predictable regulatory framework that preserves competitiveness and supply security.









## Company snapshot

AGF Nitrogen is the pan-European nitrogen sub-holding of AGROFERT, bringing together fertilizer, ammonia and related nitrogen businesses across Europe, serving agriculture and industry through production, distribution and downstream markets.

**KEY FOCUS AREAS**

- European fertilizer and nitrogen production
- Integrated supply, distribution and market access
- Efficiency, decarbonisation and long-term competitiveness

**www.agf-nitrogen.com/en**

MAADEN

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

One of the most underestimated challenges facing the European fertilizer industry is maintaining long-term food security while advancing sustainability objectives and addressing declining soil health. Much of the conversation focuses on individual issues such as carbon emissions, regulatory compliance, or input costs. The bigger challenge is managing all of these interconnected priorities without compromising nutrient availability and crop productivity.

Europe's agricultural resilience depends on reliable access to essential nutrients, but it also requires improving nutrient quality and restoring soils increasingly affected by micronutrient depletion. At the same time, geopolitical uncertainty, evolving trade patterns, energy market volatility, and growing environmental expectations continue to reshape global fertilizer supply chains.

The real challenge is building a fertilizer system that is resilient, sustainable, and capable of supporting healthier soils. Food security, environmental progress, and agricultural productivity should not be viewed as competing objectives. Long-term success will depend on delivering all three simultaneously.

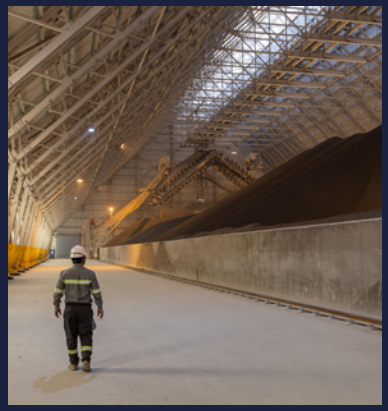
## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

This challenge is reinforcing our focus on resilience, resource efficiency, and long-term investment across our operations. We are focused on continuing to strengthen production reliability, improving nutrient stewardship, and supporting agricultural systems that need both productivity and sustainability.

It is also shaping how we think about innovation and future growth. Alongside initiatives that reduce environmental impacts across the value chain, we are investing in projects that expand access to low-cadmium nutrient sources and support the development of multi-nutrient fertilizer grades.

These investments are designed to help meet evolving regulatory expectations while addressing soil nutrient depletion and the growing need for balanced crop nutrition.

At the same time, we continue to strengthen supply chain resilience and support sustainable agricultural productivity in an increasingly complex global environment.







## Company snapshot

Maaden is the Middle East's largest multi-commodity mining and metals powerhouse, with operations including gold, phosphate, bauxite, copper and beyond.

As one of the world's fastest-growing mining companies, Maaden is entering a new era of growth unlike anything the industry has ever seen. Defined by unprecedented pace and scale, it is expanding production through integrated, world-class projects and accelerating exploration of the Kingdom's vast mineral endowment.

**www.maaden.com**

AGI From field to future

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

One of the most underestimated challenges facing the fertilizer industry in Europe today is the growing pressure to balance sustainability targets with operational efficiency and food security. Regulations surrounding emissions, environmental impact, and nutrient management are evolving rapidly, but the infrastructure and supply chains required to support these transitions are not advancing at the same pace.

Many people view fertilizer purely as an input cost, yet it is deeply connected to agricultural productivity, logistics, energy markets, and global trade. Small disruptions in storage, transportation, or nutrient availability can have significant consequences for growers and the wider food supply chain.

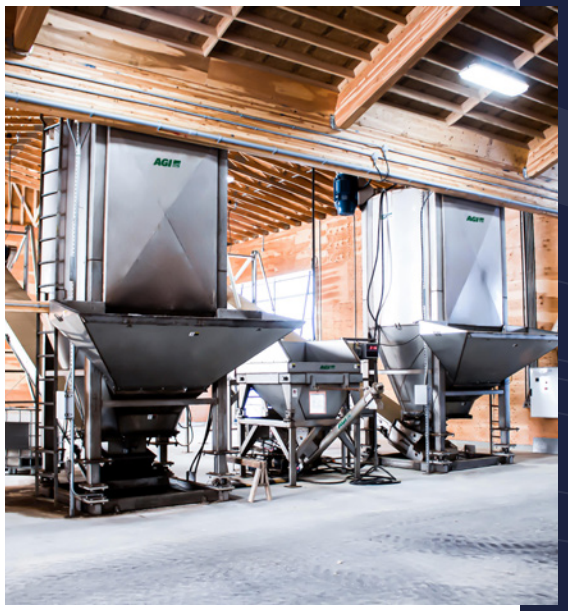
What matters most is the industry's ability to adapt without compromising reliability or affordability. Companies across the sector are being challenged to improve efficiency, reduce waste, and modernize operations while continuing to meet increasing demand. The businesses that succeed will be those that invest in long-term resilience, flexibility, and smarter handling processes rather than short-term reactions to market pressure.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

At AGI Fertilizer Systems, these industry challenges are driving a stronger focus on operational efficiency, flexibility, and long-term infrastructure planning. As regulations, supply chains, and customer requirements continue to evolve, there is increasing demand for fertilizer handling systems that can adapt to changing operational needs while maintaining reliability and throughput.

This is influencing how AGI approaches project design, engineering, and customer collaboration. Greater emphasis is being placed on understanding site-specific requirements, improving material flow, and supporting more efficient handling processes across storage, blending, and transportation operations.

The industry's transition toward more sustainable and resilient practices also highlights the importance of scalable solutions and long-term thinking. For AGI, this means continuing to support customers with practical, efficient systems designed to help operations remain productive, adaptable, and prepared for future industry demands across Europe and global markets.






## Company snapshot

AGI Fertilizer Systems delivers premium dry fertilizer handling solutions worldwide, offering:

- Custom-engineered equipment
- Efficient bulk blending systems
- Full turnkey support from design to installation.

**https://www.aggrowth.com/en-em/commercial-fertilizer**

**emea@aggrowth.com**

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

One of the most underestimated challenges facing the European fertilizer industry is the gradual erosion of its long-term competitiveness. Much of the current debate focuses on decarbonisation, energy transition and regulatory compliance, but less attention is paid to whether Europe can remain a globally competitive location for both fertilizer production and agriculture.

European producers operate under some of the world's highest energy prices, labor costs and environmental requirements. While these standards reflect important societal goals, they also place a significant cost burden on industry across the value chain.

The impact extends beyond the fertilizer sector, affecting farmers, food production and Europe's broader economic resilience.

The risk is that Europe achieves environmental progress while simultaneously weakening domestic industrial capacity and increasing dependence on imports from regions operating under different standards. Competitiveness, food security and sustainability should therefore be viewed as interconnected objectives rather than separate policy goals.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

This challenge is encouraging us to think more broadly about resilience, market diversification and long-term value creation. We are expanding our product portfolio in line with evolving agricultural needs and strengthening our understanding of customer requirements across different regions and crop systems.

At the same time, we are continuing to invest in a multi-year development program focused on improving efficiency, supporting decarbonisation objectives and advancing innovative solutions that can contribute to the future of sustainable agriculture.

Diversification also plays an important role in our approach. By maintaining a presence across multiple international markets, we are better positioned to adapt to regional market fluctuations while maintaining stability and supporting long-term growth in an increasingly complex operating environment.








## Company snapshot

Agropolychim is a leading fertilizer producer in Southeast Europe, serving agricultural markets worldwide through diversified production, international distribution and long-term investments in innovation, sustainability and operational excellence.

**KEY FOCUS AREAS**

- Sustainable fertilizer production and innovation
- International market development and diversification
- Operational efficiency and industrial transformation

**www.agropolychim.bg**

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

The most misunderstood challenge facing the fertilizer industry today is not simply the rising cost of raw materials or energy, but the growing uncertainty across the entire global supply chain. Fertilizer production depends heavily on natural gas, phosphate rock, potash, transportation, geopolitics, and increasingly complex environmental regulations. A disruption in any one of these areas can quickly affect availability and prices worldwide.

This matters more than many people realize because fertilizer is directly linked to global food security. Farmers cannot easily compensate for shortages by reducing fertilizer use without potentially affecting yields, soil fertility, and ultimately food prices. At the same time, the industry must produce more efficiently while reducing its environmental footprint.

The real challenge, therefore, is balancing affordability, supply security, productivity, and sustainability simultaneously. Companies that can manage this complexity through diversified sourcing, efficient production, innovation, and long-term partnerships will be better positioned to remain competitive and support a more resilient global food system.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

The increasing uncertainty in global fertilizer supply chains is shaping how ALKİM thinks about production, investment, and market strategy. As a Turkish producer of natural, 100% water-soluble SOP, we see our proximity to European markets as a significant strategic advantage. Being geographically close to Europe allows us to provide shorter lead times, greater supply flexibility, and lower logistical risk compared with suppliers located farther away.

At the same time, our natural and fully water-soluble SOP offers an important advantage as European agriculture increasingly focuses on efficiency, sustainability, and responsible nutrient management. We are therefore investing in operational efficiency, production reliability, quality consistency, and logistics capabilities to ensure that our customers can depend on a stable supply.

Our strategy is increasingly focused not only on producing fertilizer, but on becoming a reliable regional supply partner. By combining local production, proximity to Europe, logistical flexibility, and a natural high-quality product, we aim to reduce supply-chain uncertainty for customers while supporting more efficient and sustainable agricultural production.







## Company snapshot

ALKİM, with the production experience of over 60 years, offers high quality, %100 water soluble SOP to its customer worldwide. We guarantee

**KEY FOCUS AREAS**

- Min %52 K20 content
- Natural, %100 WS SOP
- Almost zero Chlorine
- Neutral, no acidity, no heavy metals
- Dust free

**www.alkim.com.tr/**

BAGTECH
FERTILIZER MANAGEMENT
AND HANDLING SOLUTIONS

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

One of the most underestimated challenges in Europe is not simply fertilizer availability or price, but the growing complexity behind every tonne produced, imported, handled, blended, and applied. Since 2021, Europe's fertilizer market has faced persistent volatility, with nitrogen prices in April 2026 reported at 71% above the 2024 average. At the same time, the market is being reshaped by energy costs, import dependence, CBAM, Russian and Belarusian trade restrictions, and pressure to lower emissions.

This matters because fertilizer is no longer just a commodity input. It is becoming a strategic link between food security, industrial policy, climate policy, and farm-level economics. The businesses that adapt best will likely be those that reduce waste, improve handling accuracy, protect product quality, and use data to make operations more resilient in an increasingly unpredictable market.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

For Bagtech, entering the European market means listening before assuming. Europe's fertilizer sector is technically advanced, but it is also under pressure to become more efficient, traceable, and adaptable. That is influencing how we think about plant design, automation, and after-sales support.

We are placing greater focus on flexible systems that can handle changing raw materials, accurate blending and bagging, reduced product degradation, and practical data visibility for operators and management. The aim is not only to build equipment that performs mechanically, but to support better operational decisions over the life of the plant. For a market facing higher input costs and tighter scrutiny, small gains in accuracy, uptime, and product preservation can become commercially significant.





## Company snapshot

More than 48 years of experience in agribusiness and 200 projects completed, our team is ready to provide a complete management service for the handling of the fertilizer supply chain to your company.

**KEY FOCUS AREAS**

- Fertilizer management and handling
- Manufacturing of fertilizer blending plants
- Manufacturing of fertilizer bagging machines

**www.bagtechint.com**

CBAMBOO

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

European fertilizer importers understand that verified emissions data lowers their CBAM costs. What is less well understood is how difficult obtaining that data will be, and how little time remains to put the right systems in place.

Verifiers are expected to begin issuing audit reports in January 2027. That leaves roughly six months for producers around the world to get audit-ready. For many, it will not be enough.

Passing a CBAM audit requires a monitoring plan, a lengthy, technical document that sets out precisely how an installation measures its emissions. It is a completely new procedure for most installations and it could take months to do properly.

For European importers, the real challenge is upstream engagement: identifying which suppliers are at risk of high default values, ensuring they have started preparing monitoring documentation, and making sure they are already contracting with accredited verifiers to conduct their first audit. The risk of leaving this too late will ultimately fall squarely on the importer when they get the bill in 2027.

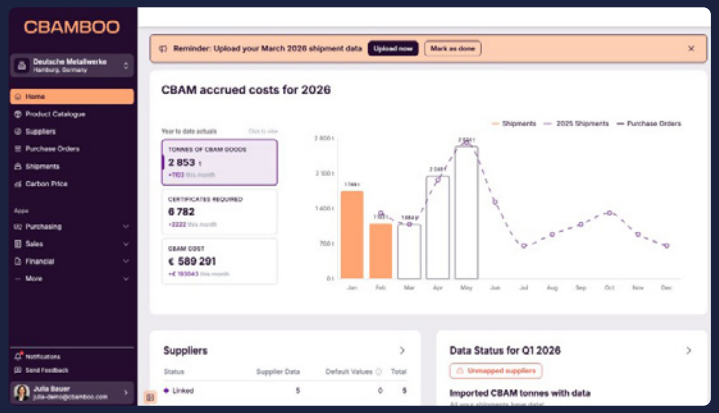
## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

Exporters know they need verified emissions data. But they don't know where to start when it comes to translating the CBAM methodology into a monitoring plan that reflects the specifics of their own installation.

That means identifying every material source of emission in their production process, mapping process flows, and documenting how each one is measured. This is the document a verifier will scrutinise first. Get it wrong, or leave it incomplete, and the audit stalls before it begins.

We worked with one producer to review their monitoring infrastructure and calculations, bringing their effective CBAM charge for EU customers below €2 per tonne, against hundreds of euros on default values.

We, at CBAMBOO, are actively helping exporters build the foundations before audits begin.




## Company snapshot

CBAMBOO is the leading independent specialist for CBAM management and policy, combining both advisory and software services to simplify compliance, analyse risk, and minimise CBAM costs. Our advisory services include training, legislative analysis, policy updates, engagement with suppliers and third parties, and the sharing of best practices. Our software offering includes internal reporting of CBAM exposure for commercial and financial teams, forecasting tools to support pricing decisions, and streamlined compliance processes. Founded in 2023, CBAMBOO is ISO 27001 certified and is based in London.

**KEY FOCUS AREAS**

- CBAM management strategy, cost modelling, and supply chain engagement for EU importers
- Monitoring plan development and emissions data infrastructure for non-EU exporters
- Advisory on CBAM commercial agreements, including carbon cost allocation between importers and suppliers

**www.cbamboo.com**

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

In Europe, most discussion focuses on nutrients, feedstock and pricing. The challenge that is consistently underestimated sits at the end of the chain: how product is packaged, protected and moved. Packaging is still treated as a cost line, yet it now sits at the intersection of three converging pressures. New regulation (the PPWR) requires recycled content and recyclable formats; sustainability targets demand less material; and long, increasingly volatile export routes demand more protection, not less. These forces pull in opposite directions. Introducing recycled material without compromising mechanical performance, or reducing thickness without losing product protection and load stability, is far harder than it appears. When packaging fails, the cost is not only wasted film — it is damaged product, unstable pallets, delayed deliveries and lost trust. This matters because reliability, sustainability and compliance increasingly meet, or fail, in exactly the part of the chain the industry pays least attention to.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

It has changed where we invest and how we define quality. Rather than treating recycled content as a compliance box to tick, we approach it as an engineering problem: qualifying certified European polymer sources, tightening supplier selection, and investing in extrusion technology so that higher recycled percentages do not mean lower reliability. We have also shifted from thinking about the bag in isolation to thinking about the whole loaded pallet — how it behaves over long, difficult export journeys — which led us to achieve EUMOS certification 40509, the European standard for pallet stability during transport. Increasingly we see our role less as supplying a container and more as protecting product, reducing waste and supporting our customers' sustainability and safety objectives.








## Company snapshot

Cielle is a family-owned Italian producer of FFS polyethylene films for 10–50 kg bags and pallet stretch hood, supplying the fertilizer industry for over seventy years with sustainable, high-performance solutions.

**KEY FOCUS AREAS**

- Recycled-content, PPWR-compliant packaging without loss of mechanical performance
- Load stability and logistics safety for long-distance transport
- Advanced multi-colour printing for brand visibility and product differentiation

**www.ciellesrl.com**

Czech University of Life Sciences Prague

## What emerging challenge, trend or opportunity in European agriculture and plant nutrition deserves greater attention from the fertilizer industry over the next decade, and why?

One of the most important opportunities facing European agriculture is the transition from a linear nutrient system to a more circular and resource-efficient approach to plant nutrition. As Europe seeks to strengthen food security, reduce environmental pressures and improve resilience to geopolitical and supply chain disruption, greater attention must be given to how nutrients are sourced, utilised, recovered and returned to agricultural systems. This includes the development of recycled fertilizer materials, bio-based products, nutrient recovery technologies and improved approaches to nutrient use efficiency. The challenge is not simply to replace existing fertilizer products, but to ensure that new solutions can be scientifically validated, economically viable and practical for farmers to adopt at scale. Achieving this will require closer collaboration between researchers, industry, policymakers and growers. The greatest opportunity lies in bridging scientific innovation with commercial application, ensuring that promising technologies move beyond research environments and deliver measurable benefits within real agricultural systems.

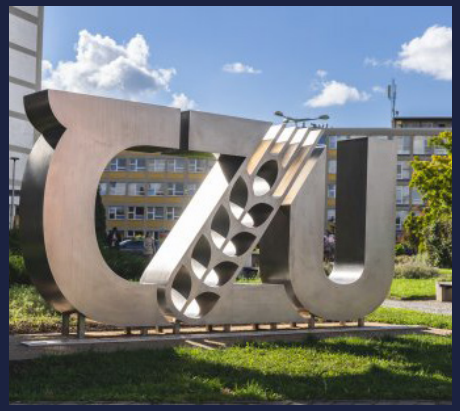
## How is the Czech University of Life Sciences Prague helping drive understanding, innovation or practical solutions in this area?

The Czech University of Life Sciences Prague (CZU) is actively involved in research focused on sustainable plant nutrition, nutrient use efficiency, recycled fertilizer materials and circular agriculture.

Through multidisciplinary research programmes and collaboration with industry partners, CZU evaluates emerging fertilizer technologies under practical conditions, helping improve understanding of their agronomic performance, environmental impact and commercial potential. This includes work relating to novel fertilizers, bio-based materials, waste-to-fertilizer technologies and the development of biochar-based solutions.

CZU also contributes to European research initiatives that connect scientific research with practical agricultural application, supporting the transfer of knowledge between academia and industry. By combining laboratory research, field testing and industry collaboration, the university aims to help accelerate the development of sustainable fertilizer solutions capable of supporting both agricultural productivity and long-term environmental goals.



# Company snapshot

Czech University of Life Sciences Prague (CZU) is one of Central Europe's leading agricultural and life sciences universities, conducting research across agronomy, soil science, plant nutrition, environmental sciences and sustainable agriculture. Through international research programmes and close collaboration with industry, CZU supports the development of practical solutions to some of the most significant challenges facing modern agriculture.

**KEY FOCUS AREAS**

- Sustainable plant nutrition
- Soil fertility and nutrient management
- Recycled and circular fertilizer systems
- Biochar and carbon-smart agriculture
- Novel and bio-based fertilizers
- Agricultural sustainability and environmental protection

**www.czu.cz**

HENGJI CHINA

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

One of the most underestimated challenges facing the European fertilizer industry is the growing fragility of nitrogen supply chains. While much attention is given to pricing volatility, the underlying issue is structural: supply is increasingly exposed to geopolitical disruption, energy market instability, and regional concentration of production.

This matters because agriculture depends on consistent and predictable nutrient availability. When supply chains are disrupted, farmers are left with fewer reliable options at critical moments in the crop cycle. Over time, this can influence planting decisions, yields, and ultimately food security.

The challenge is not only about availability, but about flexibility. A system built around a narrow range of dominant products and supply sources is less able to respond to shocks. Building resilience into nitrogen supply is therefore becoming just as important as managing cost - yet it is still often overlooked.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

This challenge is prompting a shift towards greater diversification and adaptability in how we think about nitrogen supply. Rather than relying on a single dominant product or sourcing model, there is increasing focus on broadening supply options and improving logistical flexibility.

This includes strengthening relationships across different regions, investing in more efficient production and distribution systems, and ensuring products can be applied easily across a range of farming conditions. The aim is to support greater optionality for customers, particularly in periods of uncertainty.

At the same time, there is a stronger emphasis on consistency and usability in product quality, so that farmers can confidently integrate alternative solutions into existing practices without disruption.






## Company snapshot

Hengji is a China-based fertilizer producer focused on nitrogen products, with an emphasis on efficient production, international distribution, and supporting farmers with flexible supply options across global markets.

**KEY FOCUS AREAS**

- Nitrogen fertilizer production and supply
- International logistics and distribution
- Product consistency and field usability

**www.hengjifert.com**

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

Especially in Europe need for import of fertilizers, cost of energy, carbon footprint and preservation of clean water are challenging factors. Resulting high cost drive the application of fertilizers towards increased efficiency and tailored NPK formulations for each crop, soil and climatic conditions. Additionally, there is a demand for very specific eco-fertilizers for sustainability growth and organic fertilizer for specific crops.

Granulated fertilizers assure spillage free and even spreading. Such granulation systems have to provide high flexibility and quick changes of formulation with lower batch sizes. Furthermore, they should be operable with small work force and without further requirement of water, and consequently no use of thermal energy.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

We have reacted to above development by enlarging our portfolio towards smaller equipment and specialized crushers for more efficient granulation, higher degrees of automation and providing complete compaction-granulation plants.

We provide technical solutions for dry compaction-granulation of more sophisticated formulations with a variety of additives like micronutrients and urease inhibitors or use of locally available bypass streams and raw materials not used by large NPK supplier.

Furthermore, we are doing our best to cut our cost, i.e. by increasing our manufacturing efficiency and use of solar power.







## Company snapshot

The Köppern Group comprises the longstanding and well-known roller press manufacturing companies Köppern, Euragglo and Komarek. These joint portfolios and experience serve clients worldwide.

**KEY FOCUS AREAS**

- Tailored Fertilizers Compaction-Granulation Plants
- Service and Support within Reach
- Plant Audits & Training for Optimum Operation

**www.koeppern-international.com/en**

REGREEN

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

One of the most underestimated challenges facing Europe's fertilizer industry is the growing tension between food security, climate targets and strategic dependency. Europe relies heavily on imported energy, raw materials such as phosphate and finished fertilizers, while global political shifts are making supply chains increasingly vulnerable. At the same time, the sector is expected to reduce emissions without compromising agricultural productivity.

This is not only a question of securing fertilizer volumes. It is about safeguarding the long-term resilience of European agriculture. Healthy, fertile soils are a critical part of that resilience: they support productivity, nutrient efficiency and the ability of farmers to cope with climatic and economic volatility.

Europe therefore needs to rethink how fertilizers are produced, sourced and applied. A competitive local fertilizer industry remains essential, but it must become more flexible in using locally available resources, integrating circular nutrient streams and combining established mineral solutions with new, complementary approaches.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

At REPLOID REGREEN, this challenge reinforces our commitment to circular, locally anchored nutrient systems, guided by the principle "think globally, act locally." We transform regional residual streams into frass-based fertilizers, linking waste valorization, feed production and sustainable crop nutrition. We constantly rethink how to reduce reliance on imported fertilizer raw materials and how to make use of what is available locally. Our investments extend beyond fertilizer products to local sourcing, efficient processing, nutrient-use efficiency and cross-industry partnerships. Combining the precision of mineral fertilisers with efficient organic nutrient sources unlocks the best of both worlds: reliable crop nutrition, healthier soils and greater resilience. By linking local material flows with agricultural demand, we build flexible fertilizer value chains that strengthen resource security and reduce environmental impact.







## Company snapshot

REPLOID REGREEN develops circular fertilizer solutions based on regionally available nutrient streams, combining resource efficiency, soil health and practical approaches for more resilient European agriculture.

**KEY FOCUS AREAS**

- Circular and regional nutrient solutions
- Soil health, drought resilience and resource efficiency
- Integration of new and established fertilizer approaches

**https://regreen.co/**

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

While much attention goes to energy costs, regulation and raw material availability, one of the most underestimated challenges facing the European fertilizer industry is the widening gap between product complexity and operational simplicity. The market increasingly demands fertilizers with specific performance characteristics such as enhanced nutrient efficiency, lower emissions, improved storage stability and more precise nutrient release. Yet producers are expected to deliver this growing variety with limited labour, tighter margins and existing production assets.

This matters more than most people realise because differentiation is becoming the real competitive battleground, not raw tonnage. The producers who struggle will not be those lacking capacity, but those unable to make complex, specialised products economically. The quiet question shaping the next decade is not how much fertilizer Europe can make, but how flexibly and how affordably it can make products that genuinely do more in the field.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

As a manufacturer with more than a century of experience in handling and processing, we have watched this shift change what producers ask of their installations. The conversation used to centre on throughput. Increasingly it centres on flexibility: how to produce more product variants, with specific functional properties, without adding operators or extra process steps.

That has shaped how we think and invest. Our focus has moved toward automation and integrated processing, and increasingly toward upgrading existing plants so they can handle this complexity rather than replacing them. Critical components can be treated within a single continuous flow instead of separate handling stages. The aim is to let producers make more sophisticated, higher-value blends on the assets they already own, with fewer people and better reproducibility.





## Company snapshot

Royal EMT is a Dutch manufacturer with more than 100 years of history. Today EMT specializes in the manufacturing of blending, bagging and handling equipment for the fertilizer industry, serving customers around the globe.

**KEY FOCUS AREAS**

- Fertilizer blending, bagging and handling equipment
- Fertilizer coating solutions, stand-alone and in-line.
- New full factory solutions & upgrade of existing lines

**https://emt.tech**

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

1. Europe is becoming increasingly aware of its **dependence on external resources** such as gas, oil, and phosphate, creating risks for food security during political unrest. This drives the search for alternative raw materials, including urban mining and more efficient fertilizer use.

2. **Global warming** caused by $CO_2$, methane, and NOx requires urgent action. Despite the Paris Agreement, achieving climate goals by 2040 remains challenging, even with the introduction of measures such as ETS, CBAM, and low-carbon raw materials.

3. **Implementing environmental measures globally.** Several local alternatives can be good for reduction of pollution locally, but not having measures in place globally will create a non-level playing field and only a part solution.

4. **Lack of finance for green projects** due to new innovative processes bringing extra risk for investors. Therefore, the support of governments is needed.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

SusPhos addresses Europe's dependency on imported raw materials by recovering valuable phosphorus from sewage sludge ash, supporting urban mining and a circular fertilizer supply chain. Its innovative process produces low-carbon-footprint phosphorus fertilizer and cement replacers without generating waste streams such as filter cakes or wastewater. The company is currently engineering a new plant in Moerdijk, expected to be operational by 2028, which will process around 30% of Dutch sewage sludge into 40 kt/year of phosphorus fertilizer and 25 kt/year of cement replacer. In addition to these core products, SusPhos is exploring further applications, including granulation improvement, ammonia capture in stables, and anti-dust additives, demonstrating how sustainable technologies can contribute to both environmental and economic goals.






## Company snapshot

SusPhos develops circular phosphate fertilizers from sewage sludge ash, enabling sustainable phosphorus recovery with strong growth potential driven by Europe's increasing demand for local, low-carbon fertilizer solutions.

**KEY FOCUS AREAS**

- Circular and low carbon
- No waste
- Certified products at market-conform pricing

**www.SusPhos.com**
**info@susphos.com**

thyssenkrupp

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

The most underestimated challenge is Europe's growing exposure to global fertilizer imports. Recent geopolitical disruptions have revealed how quickly supply chains can destabilize when domestic production capacity declines. While high energy and labor costs, regulatory pressure, CO2 pricing, and ageing assets are widely recognized, their combined effect is accelerating a deeper structural risk: the potential loss of a strategically essential industry. This matters far more than many assume. European agriculture depends on reliable, affordable fertilizer supply, yet global markets are increasingly shaped by volatility, trade barriers, and shifting energy geopolitics. If Europe becomes structurally dependent on external suppliers, it risks reduced resilience, higher long term costs, and diminished control over its own food security. The real challenge is maintaining a viable industrial base while simultaneously transforming production toward lower carbon, more energy efficient value chains that can operate independently of imported fossil energy.

## How is this challenge influencing the way your organisation thinks, investing, or changing how it operates?

At thyssenkrupp Uhde, this challenge reinforces the need to strengthen the resilience and future viability of fertilizer production in Europe. We are increasingly focused on enabling producers to modernize existing assets through energy-efficient revamps, digitalization, and lifetime-extension strategies that reduce exposure to volatile energy markets. At the same time, we are expanding our work on integrated value chains that incorporate renewable feedstocks, power-to-x pathways, and flexible operating concepts. These approaches support both decarbonization and greater independence from imported natural gas. Beyond the traditional fertilizer business, we also see producers evolving into broader energy and hydrogen players, creating new models that link fertilizer production with regional energy transformation and long-term supply security.







# Company snapshot

thyssenkrupp Uhde combines technological expertise and global experience in engineering and servicing chemical plants, developing innovative processes and products for sustainable chemicals, fertilizers, polymers along the green hydrogen value chains.

**KEY FOCUS AREAS**

- Fertilizer technologies, including ammonia, nitric acid and urea plants
- Green hydrogen, green ammonia and sustainable chemical value chains
- Engineering, procurement and construction (EPC) solutions for the chemical industry

**www.thyssenkrupp-uhde.com**

YNFERT
YUNNAN YINGFU

## What is the most misunderstood or underestimated challenge facing the fertilizer industry in Europe today - and why does it matter more than most people realise?

Currently, the European fertilizer industry is confronted with a host of challenges. Foremost among these is the exorbitant price of natural gas, which has pushed local production costs above those in alternative producing regions.

Meanwhile, the implementation of the CBAM has driven a marked surge in the import costs of fertilizers. Collectively, these adverse factors are set to impose substantial operational strains on European local farmers.

In summary, the stringent environmental protection and carbon emission regulatory frameworks enforced across Europe stand somewhat at odds with the prevailing global energy scarcity stemming from ongoing geopolitical tensions.

## How is this challenge influencing the way your organisation is thinking, investing, or changing how it operates?

Driven by high gas prices and CBAM, Europe's fertilizer competition shifts from cost to supply chain & carbon compliance. Our ammonium sulphate exports pivot from price edge to low-carbon, traceable stable supply. As local high-cost nitrogen output shrinks, import demand rises yet CBAM tightens entry rules above pricing.

We prioritize three moves: locking low-carbon by-product suppliers, completing carbon documents, and building EU warehouse hubs. Spot trades give way to long-term contracts, carbon-linked pricing and stocking delivery. Ultimately, certified low-carbon stable suppliers win bigger European client shares.







## Company snapshot

- YNFERT: Pioneering Excellence since 2009
- The Global Leader in Granular Ammonium Sulphate
- Operating 5 modern production bases with robust efficiency
- Business Reaches 50 Countries
- Global sales 3 Million tons
- Keep Growing in 2025

**KEY FOCUS AREAS**

Nitrogen, Phosphates, Potash, and Water-soluble and Raw material of fertilizer manufacturing and trading

**www.ynfert.com**

# Agenda: Main Stage

## Carbon Borders and Trade Day – Tuesday 20 October

*Available for Carbon Borders and Trade Day pass or All Access Pass holders only*

**(ADD-ON ONLY)**

08:00 **C-Suite Roundtable Breakfast** (invite only)

09:25 **Chair's opening remarks**

09:30 **European Commission: What are the rules of the game?**

- Hear directly from the European commission on their regulatory direction and priorities for the fertilizer industry
- Understand the policy objectives behind CBAM, tariffs, and related reforms, and how Europe is balancing competitiveness, decarbonisation, and supply security

10:00 **The new regulatory landscape: CBAM, ETS, tariffs and the future cost structure of European fertilizers**

- Gain clarity on the regulatory changes, signals, and timelines impacting the European fertilizer industry
- Implications for compliance planning and capital allocation frameworks for producers and importers

10:30 **CBAM's market impact: Pricing, trade flows, and competitive dynamics in European fertilizers**

- Understand how carbon-adjusted fertilizer pricing is calculated, how it compares with emerging low-carbon fertilizer price structures
- How has CBAM has reshaped fertilizer pricing trends and what pricing impacts should the market expect beyond 2026?
- How are trade flows shifting under CBAM, and how have geopolitical amplified or redirected these trends?
- Beyond nitrogen containing fertilizers what are the impacts on other key agricultural or related chemical sectors

*Claudia Wlk, Editor, Fertilizer Europe, **Argus***

11:15 **Lessons in best practice: Case studies in operationally navigating Europe's evolving fertilizer regulatory landscape**

- See how companies are navigating the volatility created by CBAM and tariff changes
- Understand how CBAM and tariff shifts are reshaping operations, from cost pressures to changes in pricing, sourcing, and supply chains
- Learn how producers, traders, and importers are adapting to changing regulations and tariffs to stay competitive, securing supply across key fertilizer grades and building operational resilience

*Gabriel Rozenburg, CEO & Founder, **CBAMBOO***
*Jan-Joost den Brinker, Vice President, **IACBAM***

12:00 **Lunch**

13:30 **CBAM verification in practice**

- What are the verification timelines
- How can importers and producers obtain actual data that stands a real chance of receiving and passing verification in 2027?

*Daniel Wittl, GHG Auditor (EU ETS, CBAM, Carbon Footprints), **TÜV SÜD***

14:00 **End market insights: How is CBAM reshaping European Agriculture**

- Farmer perspectives and thoughts on CBAM costs
- How has the introduction of CBAM impacted the competitiveness of European agriculture
- How can carbon regulations support European agriculture

*Moderator: Claudia Wlk, Editor, Fertilizer Europe, **Argus***
*Antoine Hoxha, Director General, **Fertilizer Europe***
*Georgi Borisov, Commercial Director, **Agropolychim***
*Bruno Menne, Director of Commodities, **COPA COGECA***

14:45 **Chair's closing remarks**

15:00 **Ask Argus Roundtables**

**(ADD-ON ONLY)**

### Fertilizer Fundamentals Workshop, Part 1*

15:00 **Sustainable fertilizers**
*Jack Merriott, Senior Manager - Consulting, **Argus***

15:30 **Sulphur and sulphuric acid**
*Maria Mosquera, Editor – Sulphur, **Argus***

16:00 **Natural Gas**

- Insights into how the market works and how it has changed due to the conflict in the Middle East

*Jana Hernandez Mendoza, Editor Argus Daily Gas Report, **Argus***

16:30 **Ammonia**
*Marina Simonova, Principal, Fertilizers & Ammonia, **Argus***

17:00 **End of Fertilizer Fundamentals Workshop, Part 1**
*Part 2 takes place on Wednesday 22 October*

17:30 **Evening drinks reception in the Hilton**
*open to all attendees*

# Agenda: Main Stage

## Day 1 Main conference – Wednesday 21 October

08:30 **Exhibition open**

08:30 **Women in Fertilizer networking**

10:25 **Chairperson's Opening remarks**

*Tim Cheyne, SVP Fertilizers & Agriculture, Argus*

10:30 **Host sponsor welcome**

*Mr. P. Cingr, Chairman of the Board, CEO, AGF Nitrogen*

10:40 **Keynote Opening Address**

*Fabien Santini, Head of Unit – DG Agri - Governance of Agri-Food Market, European Commission*

11:10 **Argus fertilizer market outlook: Pricing Europe's fertilizer markets at a time of conflict**

- How supply, demand, and trade flows in Europe's fertilizer market are evolving under heightened volatility
- The structural and long-term pricing implications of Middle East conflict, including energy risk and supply disruption
- What producers, traders, and buyers should be watching as key price drivers over the next 12–36 months

*Marina Simonova, Principal, Fertilizers & Ammonia, Argus*

11:45 **KEYNOTE PANEL: European competitiveness in a new geopolitical era: Securing production, energy, and food systems amid global upheaval**

- What have recent geopolitical shocks revealed about Europe's reliance on external fertilizer supply
- How can producers plan amid high gas prices, the loss of Russian volumes, supply shortages, and volatile markets
- What future disruptions or 'Black Swan' events could reshape the industry over the next five years

*Brian Cameron, Global Head of Sales, thyssenkrupp Uhde*
*Mr P. Hanus, CCO, member of the board, AGF Nitrogen*
*OCP Nutricrops Senior representative*

12:00 **Lunch**

14:00 **Shipping, sourcing & supply chain resilience in a geopolitical crisis: Securing fertilizer flows in an era of fragmentation**

- How can the fertilizer industry navigate soaring freight rates, tightening maritime insurance conditions, and new geopolitical chokepoints?
- How are sourcing patterns shifting without dependable flows, and how does today's disruption differ from in 2022?
- What technologies, logistics innovations, and operational models can strengthen the resilience of fertilizer supply systems?

*Moderator: Oliver Hatfield, VP – Business Development, Argus*
*Milton Sato, Head of Global Market Intelligence, FertiStream*
*Derek Langston, Global Head of Dry Research, Braemar*
*Ilya Motorygin, Chief Trading Officer, GG Trading*

14:45 **Argus Natural Gas outlook: Temporary disruption, or prolonged supply shock**

- How have geopolitical shocks reshaped natural gas, trade flows, and regional supply–demand balances?

*Jana Hernandez Mendoza, Editor Argus Daily European Gas Report, Argus*

15:05 **Day 1 chairpersons closing remarks**

15:00 **Happy Hour in the exhibition hall**

(ADD-ON ONLY)

### Fertilizer Fundamentals Workshop, Part 2*

15:30 **Potash**

- Overview of the different types of potash
- Supply and demand dynamics
- Current market themes

16:00 **Phosphates**

- Production and consumption hubs
- Trade dynamics
- Market drivers
- Things to keep an eye on

*Tom Hampson, Editor – Phosphates, Argus*

16:30 **Urea**

*Owen Gooch, Senior Analyst – Analytics, Argus*

17:00 **Rooftop evening networking reception**

# Agenda: Main Stage

## Day 2 Main Conference – Thursday 22 October

09:00 **Doors Open**

09:15 **Chairperson's Opening Remarks**

09:20 **Sulphur market outlook: Refining expansions, trade shifts and Europe's strategic demand**

- How are refining cuts and conflict driven trade disruptions in the Middle East and Russia fuelling sulphur price volatility and delivery unpredictability?
- What sourcing strategies are European buyers adopting as conflict related risks reshape traditional supply routes?

*Maria Mosquera, Editor, Sulphur, **Argus***

09:40 **Beyond gas-based fertilizers: The growing role of specialty, additive & organic solutions in Europe's fertilizer future**

- Why are specialty fertilizers, inhibitors, organics, and biostimulants gaining momentum in Europe and how is the market growing
- Can bio fertilizers reduce dependence on gas-based fertilizers amid geopolitical and energy-market disruption?
- How are EU policies, sustainability standards, and government mandates accelerating adoption

*Moderator: Oliver Hatfield, VP – Business Development, **Argus***
*Daniel Garcia, R&D & Laboratory Director, **Afepasa***
*Fotini Giannakopoulou, General Manager, **Hellenic Fertilizer Association (S.P.E.L)***
*Nicolas Willaume, Presidnt, **ECOFI***

10:20 **Container Freight Presentation**

*Philip Damas, Managing Director, **Drewry Supply Chain Advisors***

10:40 **Networking break**

11:10 **End-user perspectives: The reality of rising fertilizer prices, volatility and European food security**

- How are elevated and volatile fertilizer prices impacting farm-level economics, including margins, fertilizer application decisions, crop choices, and the ability to maintain yields across key seasons
- What happens when fertilizer costs exceed sustainable levels, and how close is European agriculture to demand destruction, under-application, or long-term productivity loss?
- How can fertilizer access and affordability be safeguarded to protect Europe's food and feed security

*Moderator: Antoine Guyon, Senior Editorial Analyst, **Argus***
*Doriana Milenkova, Senior analyst – Farm Inputs and Sugar, **Rabobank***
*Katharina Geiger, Head of Unit Arable Farming, **German Farmers Association***
*Robert Horster, Senior Research Fellow, **Erasmus Commodity & Trade Centre***

11:50 **Clean ammonia and the future of fertilizer: Energy security, adoption, and demand**

- Can clean ammonia offer a near-term solution to energy volatility and geopolitical risk, enabling more secure fertilizer production from local, renewable feedstocks?
- What role can the fertilizer industry play in accelerating clean ammonia adoption and production?
- How to unlock end user demand from the agricultural and FMCG industry for low carbon fertilizer

*Terje Bakken, Director for Ammonia and Fertiliser Markets, **ATOME PLC***
*Jack Gomersall, Senior Manager, Industrial Innovation Europe, **CATF***

12:20 **Agricultural market update: Impact of the Middle East conflict**

- How have tariffs and geopolitical tensions reshaped agricultural trade flows
- How did the middle east conflict impact the fertilizer application season and impact yields
- Outlook planting

*Antoine Guyon, Senior Editorial Analyst, **Argus***

12:40 **Chairperson's closing remarks & end of conference**

12:30 **Farewell Lunch**



# **Agenda:** Innovation Stage

## Tuesday 20 October

**10:00-10:20**

**Under pressure: why now is the time to rethink your fertiliser portfolio**

***Jessica Fitch,*** *Secretary General,* ***ECOFI***

**11:00-11:30**

**Harnessing the power of the ocean: Seaweed biostimulants for resilient crops**

**14:00-14:20**

**Rethinking fertilizer small-bag packaging: From cost to strategic value**

***Giacomo Loreto,*** *Sales Manager,* ***Cielle Imballaggi***

**15:00-15:20**

**Bridging academia and industry: Scaling biochar and next-gen sustainable fertilizers**

***CZU***

## Wednesday 21 October

**11:40-12:00**

**From Mineral to Circular: Exploring Hybrid Fertilizer Concepts with Insect Frass**

***Andreas Steinbüchler,*** *CEO,* ***REPLOID REGREEN GmbH***

***Dr. Kristin Bohm,*** *Head of R&D Insect Frass,* ***REPLOID REGREEN GmbH***

**13:30-13:50**

**Phoenix One, recycling precious phosphate from ashes, becomes reality!**

***Kees Langeveld, SusPhos***

***Marissa de Boer,*** *Founder and Chief Executive Officer,* ***SusPhos***

**15:00-15:20**

**AI-driven fertilizer optimisation: Precision, efficiency and yield gains**



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