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Fertilizers Forum
& Exhibition**

Paper Abstracts



World Food Security Situation and Challenges

Dr. Munir Gabra Butrous, Senior Professional Officer, FAO United Nations

Abstract:

The number and the proportion of undernourished people have declined in 2010, but they remain unacceptably high at 925 million. Countries in protracted crisis require special attention, however, improving food security in protracted crises requires going beyond short-term responses in order to protect and promote people's livelihoods over the longer term. Agriculture and the rural economy, besides supporting institutions, are key sectors for supporting livelihoods in protracted crises. Agricultural production will need to increase by 70 percent in the world and to double in the developing countries in order to feed a global population expected to reach 9.1 billion in 2050. Almost all of this demographic growth will take place in developing countries, and primarily in urban zones. Moreover, the increasing volatility of agricultural commodity prices is becoming a major problem that requires special attention. Also, climate change is impacting negatively on agricultural production



Academic background

- PhD in Pesticides
- B.Sc. in Agriculture Science, major discipline in pesticide

Experience:

- 2001- Present :Secretary of the Commission for Controlling the Desert Locust in the Central Region
- 1996 – 2001: National Professional Officer, for Control of Desert Locust in, Emergency Prevention
- 1972- 1996: System EMPRS programme, Plant Protection Officer in Ministry of Agriculture of Sudan



Session II - Global Fertilizer Outlook

Chairperson: Eng. Ahmed El Gayar

Chairman & Managing Director, Abu Qir Fertilizer Co., Egypt

1 Overview of Fertilizer Policy in India: Current Situation and Future prospects

Mr. Satish Chander, Director General

2 Nutrient Balance in Arable Lands..a global Challenge for the fertilizer Industry

Dr. Paul Fixen, Senior Vice President

3 Australian Fertilizers Prospects and Issues

Mr. Nick Drew, Executive Manager

4 The Chinese Fertilizer Market- Current Trends & Future Perspectives

Mr. Mike Nash, Senior Editor Manager

FAI

India



IPNI

USA



FIFA

Australia



ICIS

UK



Overview of Fertilizer Policy in India: Current Situation and Future prospects

Mr. Satish Chander, Director General, FAI, India

Abstract:

India is the second largest populated country in the world. Ensuring food security to the growing population is the prime objective of the government. Fertiliser is the vital input needed for increasing production of foodgrains and other principal crops. It has been the endeavour of the government to ensure availability of adequate quantity of quality fertiliser at reasonable price to the farmers. Various committees were formed from time to time to suggest measures for promoting higher and balanced use of fertiliser, ensure quality fertiliser, encourage indigenous production, etc. Nutrient based subsidy (NBS) on P & K fertilisers was introduced by the Govt. of India w.e.f 1st April, 2010 as a part of the reform process in the fertilizer sector. There is need for further reforms in the fertilizer sector in future, by inclusion of urea under NBS, decanalisation of urea, inclusion of new/innovative products under the subsidy scheme, etc.



Academic background

- PhD in Pesticides
- B.Sc. in Agriculture Science, major discipline in pesticide

Experience:

- 2001- Present :Secretary of the Commission for Controlling the Desert Locust in the Central Region
- 1996 – 2001: National Professional Officer, for Control of Desert Locust in, Emergency Prevention
- 1972- 1996: System EMPRS programme, Plant Protection Officer in Ministry of Agriculture of Sudan

Nutrient Balance in Arable Lands. A global Challenge for the fertilizer Industry

Dr. Paul E. Fixen, Senior Vice President, IPNI, USA

Abstract:

Nutrient balance, defined as nutrient removal by crops compared to fertilizer and manure use, is one of many critical performance indicators of the sustainability of cropping systems employing 4R nutrient stewardship. Negative balances lead to declining soil fertility and eventually to reduced productivity once nutrient supplies drop below critical levels. Positive balances are usually associated with increasing soil fertility and may eventually lead to elevated loss of nutrients to the environment. Aggregate current balances and balance trends over time vary among countries and nutrients. Nutrient balances for several countries will be reviewed and the implications discussed.



Academic background

- Ph.D., Soil Fertility and Chemistry, Colorado State University, 1979.
- M.S., Soil Fertility, South Dakota State University, 1977.

Experience:

- 2007-current: Sr. Vice President, International Plant Nutrition Institute. Coordination of Americas and Oceania programs and global director of research.
- 1997-2007: Sr. Vice President, Potash & Phosphate Institute. Coordination of North American Programs.
- 1989-1997: Northcentral Director, Potash & Phosphate Institute. Conducted agronomic research and education programs on nutrient management in the north central U.S.

Australian Fertilizers Prospects and Issues

Mr. Nick Drew, Executive Manager, FIFA, Australia

Abstract:

The presentation will discuss the size, value and distribution of the current Australian fertilizer demand both geographically and temporally.

The public policy issues likely to affect the industry in both the short and medium term will be presented and the industry's strategy for dealing with them discussed. Environment, food safety, security, quarantines and food security will be covered.

Factors affecting future demand and the medium term outlook for the industry will be discussed in the context of current market data. Fertilizer production projects in Australia will be briefly summarized.



Academic background

- Graduate – Australian Institute of Company Directors
- Bachelor of Applied Science, Rural Technology, University of Queensland

Experience:

- 2001- Present :Secretary of the Commission for Controlling the Desert Locust in the Central Region
- 1996 – 2001: National Professional Officer, for Control of Desert Locust in, Emergency Prevention
- 1972- 1996: System EMPRS programme, Plant Protection Officer in Ministry of Agriculture of Sudan

The Chinese Fertilizer Market-Current Trends & Future Perspectives

Mr. Michael Nash, Senior Editor Manager, ICIS, UK

Abstract:

This paper will set out the current fertilizer supply situation in China and cover capacity additions to 2015-16. The paper will examine how China will likely feature as part of the global supply chain for fertilizers, with particular reference to its export policy.....The paper will examine China's rise to nominal self sufficiency in the phosphates sector and how this impacts international trade going forward. The paper will also look at China's strategic position in terms of fertilizer natural resources. Finally, it will examine China's demand for fertilizers going forward, and what this means for the international industry in terms of likely trade flows.



Academic background

- Chartered Institute of Marketing Advanced Certificate
- BSc (Hons) Regional Science (human Geography & Economics)

Experience:

- Jan 2007-present: Senior Editor Manager ICIS/The Market with special responsibility for coverage of the phosphate sector
- Oct 2004-Dec 2006: Analyst Fertecon covering the international phosphate market
- July 2000-August 2004: Technical editor of various B2B engineering, energy and manufacturing titles



Session III- Fertilizer Supply/ Demand Situation & Future Prospects

Chairperson: Mr. Michel Prud'homme
 Director, Production & International Trade Services, IFA, France

<p>1 Petrochemicals Industry in Egypt Eng. Osama Kamal, Chairman</p>	<p>ECHEM</p>	<p>Egypt</p>	
<p>2 Global Fertilizer Short-term Outlook: Toward a Full Recovery Mr. Michel Prud'homme, Director, Prod.& Int'l. Trade Services, IFA, France</p>	<p>IFA</p>	<p>France</p>	
<p>3 North American Fertilizer Situation & Outlook Mr. Ashley Harris, Purchasing Manager</p>	<p>Agrium</p>	<p>Belgium</p>	
<p>4 Trends in Nitrogen Fertilizer Industries from a Contractor's view Mr. Richard Saure, VP Sales Ammonia and Urea Division</p>	<p>Uhde</p>	<p>Germany</p>	

Petrochemicals Industry in Egypt

Eng. Osama Kamal, President & Chairman of the Board,
Egyptian Petrochemicals Holding Co." ECHEM", Egypt

Abstract:

This paper define the petrochemical industries , the beginning of petrochemical industries, definition of Egyptian Petrochemicals Holding Co, " ECHEM " and national plan, future directions, development & executive strategy, projects under construction, projects under studies. .



Academic background

- B.Sc. (Chemical Engineering)

Experience:

Almost 30 years of experience in the management and administration resources in the oil, gas & petrochemical industries,
June 2010 till present: President & chairman of the Board - Egyptian Petrochemicals Holding Co. (ECHEM):

- March 2009 – June 2010 : Chairman & C.E.O, MISR FERTELIZERS PRODUCTION CO. "MOPCO":
- Jan. 2002 – March 2009: Sr. Vice President & Member of the Board - Egyptian Petrochemicals Holding Co.
- Jan. 2000 – Jan. 2002: Assistant to the Chairman (PETROJET)
- Apr. 1984 – Jan. 2000: Manager of Projects (ENPPI)
- July 1980 – Mar. 1984: Operation Engineer (DIA – EGYPT)

Global Fertilizer Short-term Outlook: Toward a Full Recovery

Mr. Michel Prud'homme, Director- Production &
International Trade Services, IFA, France

Abstract:

As the global economy is recovering, prices of most commodities, including oil, minerals and agricultural commodities, have remained firm or have strengthened in 2010. Low grain production in the CIS and a US maize harvest well below initial expectations are driving the short-term agricultural outlook. Supported by attractive agricultural commodity prices in the second half of 2010, total world fertilizer demand is forecast to rise by 4.7% in 2010/11. In a full reversal of last year's drop in global sales and production, 2010 has seen record levels of production and sales in a sharp V-shaped recovery. Fertilizer use, sales and production exceeded expectations and reached record levels. For most main fertilizers, capacity additions will be moderate in 2010 and 2011, leading to a gradual tightness in markets through 2011. Trade prospects for merchant ammonia, processed phosphates, potash and sulphur in 2011 are positive.



Academic background

- Bachelor and Master Degrees in Geological Engineering.
- Diploma in Business Administration.

Experience:

- Director, Production and International Trade Service, IFA
- Senior Mineral Economist, Natural Resources Canada

North American Fertilizer Situation and Outlook

Mr. Ashley Harris, Purchasing Manager, Agrium Europe, Belgium

Abstract:

This presentation will provide the audience with an overview of the fertilizer market in North America and an outlook for supply and demand in 2011.

While the North American fertilizer market is relatively mature, it is a significant driver of global N, P and K markets. On a nutrient basis, North America accounts for approximately 13% of global nitrogen demand, 11% of global phosphate demand and 19% of global potash demand. In the U.S., applications of nutrients for corn production compose half of the total, making U.S. corn a significant driver within North America and globally. The outlook for 2011 in North America is positive, driven by historically strong grain and oilseed prices, especially for corn and demand for N, P and K is expected to increase in 2010/11, driven by an increase in corn area and strong grower economics.

North America is also a significant global producer of nitrogen, phosphate and potash. Supply of nitrogen is expected to remain relatively flat and phosphate productive capacity to decline in the short term. Potash capacity is expanding in Canada through several brownfield expansions, but there is little new productive capacity expected in 2011.



Academic background

- Ashley is a graduate of the University of Saskatchewan

Experience:

- He joined Agrium in 2004. Prior to joining Agrium; he accumulated extensive work experience in the agriculture industry where he progressed through positions including grain procurement and commodity merchandising.
- He was held the position of Manager, Investor Relations in Calgary where he was responsible for executing Agrium's communication strategy to investors and the financial community. He was actively involved in Agrium's recent growth initiatives including the acquisition of UAP in 2008.
- In his current role, based out of Brussels, Ashley is responsible for procurement of crop nutrients and fertilizer ingredients to support both Agrium Europe's extensive sales and distribution network, with combined annual sales of approximately 2.5 million metric tonnes, and Agrium's international distribution business..

Trends in Nitrogen Fertilizer Industries from a Contractor' s view

Mr. Richard Saure, VP Sales Ammonia and Urea Division Uhde, Germany

Abstract:

In recent years, contractors were asked more and more for larger ammonia units, most energy efficient plants, ammonia from coal feedstock instead of natural gas, and nitrogen fertilizers other than established solid urea or solid nitrates.



Academic background

- German PhD in Chemical Engineering (Technical University of Karlsruhe)
- German Master Degree in Mechanical Engineering (Technical University of Braunschweig)

Experience:

- Head of Research and Development for Ammonia, Urea and Syngastechnologies
- Sales Manager Fertilizers
- Head of Sales Ammonia and Urea Division



Session IV - Fertilizer Development & Freight Market

Mr. Mohammed Benzekri,
Head of Dept., Fertilizer Institutes Relations, Market Research
& Communications- OCP- Morocco

<p>1 Typical Response to Potassium Fertilization of crops in the WANA Region Mr. Michel Marchand, WANA Region</p>	<p>IPI</p>	<p>Switzerland</p>	
<p>2 Global Developments in Nitrogen Production Costs & Profitability Mr. Oliver Hatfield, Director- Fertilizers</p>	<p>Integer Research</p>	<p>UK</p>	
<p>3 Dry Cargo Freight Market Fundamentals Mr. Nicholas Collins, Chief Operating Officer,</p>	<p>Clarksons</p>	<p>Dubai</p>	
<p>4 Ammonia Freight Market Miss. Nichola Williams, Director,</p>	<p>Clarksons</p>	<p>UK</p>	

Typical Response to Potassium Fertilization of Crops in the WANA Region

Mr. Michel Marchand, Coordinator WANA Region, IPI, Switzerland
& Technical Manager Fertilizers Company: Tessenderlo Group

Abstract:

Food security in the WANA region remains of high priority. While adequate use of nutrients is essential for achieving maximum yield potential and therefore increased productivity, fertilizer application rates in the region are rather low (from 12 to 150 Kg/ha) and highly imbalanced towards high N and low K (N/K from 5 to 30), reflecting the common perception that K status in soils is sufficient. Agriculture in the WANA region is also characterized by high dependency on irrigation.

IPI field experiments in the WANA region are designed to meet the typical challenges of the region. Our projects are focused on the role of potassium on nitrogen and water use efficiency and on the amelioration of salinity damages. This presentation describes results obtained from various countries of the region. In Egypt, we demonstrate that K enabled reduction of water without reducing the yields. NK interaction is well known and demonstrated in experiments in Algeria. In Lebanon we demonstrate that in soils high with K, large dose of K (500 kg K₂O ha⁻¹) increased yield of wheat by 50 percent. In an experiment in saline water in Turkey, we show that K fertilization improved the WUE in different citrus rootstocks by 20 to 50 percent. Foliar application of K to olives in Tunisia increased oil yield to more than a 100 kg per tree, well over the 70 kg obtained in the control. In Sudan, application of K increased yields of cotton, sorghum and sugarcane.

In conclusion, application of K in irrigated agriculture of the arid and semi arid agri Eco systems of the WANA region is an effective tool to improve NUE, WUE and assist in overcoming salinity problems. The optimal use of potassium, which has to be calibrated to soil K and plant response, may allow reduction of excess N used as well as significantly improve the WUE in many crops.



Academic background

- Agronomist (National Superior School of Agronomy in Rennes).
- Master in Management and Marketing (IFG Lyon).

Experience:

- Technical Manager Fertilizers, Tessenderlo Group and Coordinator WANA for IPI
- Senior Agronomist, SCPA.
- Application Specialist, Rhone-Poulenc Agrochemicals

Global Developments in Nitrogen Production Costs & Profitability

Mr. Oliver Hatfield, Director- Fertilizers, Integer Research, UK

Abstract:

The paper will present nitrogen production costs and profit margins around the world, utilizing analysis from Integer's costs and competitiveness service. It will explore how production costs are changing, specifically looking at the cost of energy and feedstock, and how this is impacting the nitrogen supply curve, producer profitability, and investment decision making".



Academic background

- Oliver is a graduate of economics and development economics from Manchester University in the UK.

Experience:

- Oliver Hatfield heads up the Fertilizer research team at Integer Research in London.
- He is also one of the founders of the company. Integer Research provides a range of information, reports, and consultancy services to the fertilizer, emissions and climate change, steel, aluminum, and wire and cable industries. Oliver has 10 years of experience in business analysis and consulting.

Dry Cargo & Freight Markets Fundamentals

Mr. Nicholas Collins, Chief Operating Officer, Clarksons, Dubai

Abstract:

- Supply side by different sizes . How the different sizes of ships will affect each other
- Demand. Global growth and where it is coming from. What are the most important commodities in shipping and which are growing most...how that affects the different sizes of ships.
- Market in efficiencies. What are they and how and why they are likely to grow and affect freight rates
- Conclusion....how the supply/demand drivers are likely to affect the freight market's different size sectors



Academic background

- Ma (CANTAB)

Experience:

- COO, Clarsons Dubai, 2010
- Director, Clarksons : 1998
- Managing Director, Clarksons Singapore, 1991

Global Developments in Nitrogen Production Costs & Profitability

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Ammonia Freight Markets

Miss. Nichola Williams, Director, Clarksons Gas, UK

Abstract:

- An overview of the forces driving the freight markets for Dry Fertilizers and Ammonia. Issues examined will be freight movements, the supply of vessels, seaborne trade developments and the prospects for the market going forward.



Academic background

- Postgraduate degree in Politics & Economics of Developing Economies at Cambridge University

Experience:

- Current – Director, Clarksons Gas
- Gas Carrier Analyst, Clarksons
- Oil & Tanker Analyst, Clarkson Research

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