June 1st, 2016

EFBA GENERAL ASSEMBLY
APRIL 12, 2016
IN SAVOIA HOTEL REGENCY - BOLOGNA (ITALY)

MINUTES

Participants :
ITALY – AIF: Pier Luigi GRAZIANO, President EFBA
GERMANY – BVDM : Jörg-Ulrich DREWS
FRANCE - AFCOME: Philibert de MOUSTIER, Estelle VALLIN
NL - NVB : Maarten J. BRAND, Jaap BRINK
UK - AIC : Jo GILBERTSON
IRELAND – IFMA : Kevin Mc ARDLE
EFBA Secretary General : Pierre-François DUMAS
Excused : Pierre DETRY, Marie POZZO di BORGO

OPENING OF THE MEETING

The President, Pier Luigi Graziano, welcomes all of the participants to the 2016 Annual General Meeting of EFBA in Bologna.

1st POINT: ADOPTION OF THE DRAFT AGENDA

There was just one item. The Update of the EFBA Handbook, added to the draft agenda as presented.

2nd POINT: ADOPTION OF THE DRAFT MINUTES OF THE 2015 MEETING IN LONDON

The minutes of the Annual General Meeting held in London on March 25th & 26th , 2015 were unanimously adopted and there was no questions.

3rd POINT : ACTIVITY REPORTS FROM EACH ASSOCIATION

There were country presentations made by Germany, UK, Netherlands, Italy, France, and Ireland.

The Chairman outlined in some details the activities of the last year. He noted that for the first time EFBA held two meetings in addition to the Annual General meeting. He also indicated that he and Kevin McArdle attended a number of meetings in Brussels. These were at EU Fertilizer Working group meetings and were mainly concerned with the New Fertilizer regulations. The Proposal for the new regulations was adopted by the Commission on 17th March, 2016.

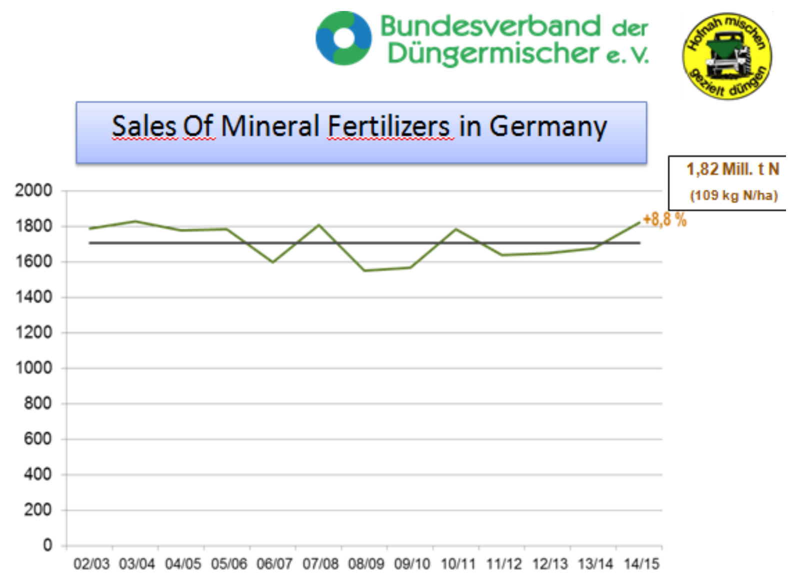
Jo Gilbertson indicated that, as there was not full harmonisation of the regulations, there was still an opportunity to use National regulations. If you were not in a position to comply with EU regulations, the only concern here was that National Governments could decide to cancel or change national regs. There was a lot of concern about the amount of information which the New Regs require on the label.

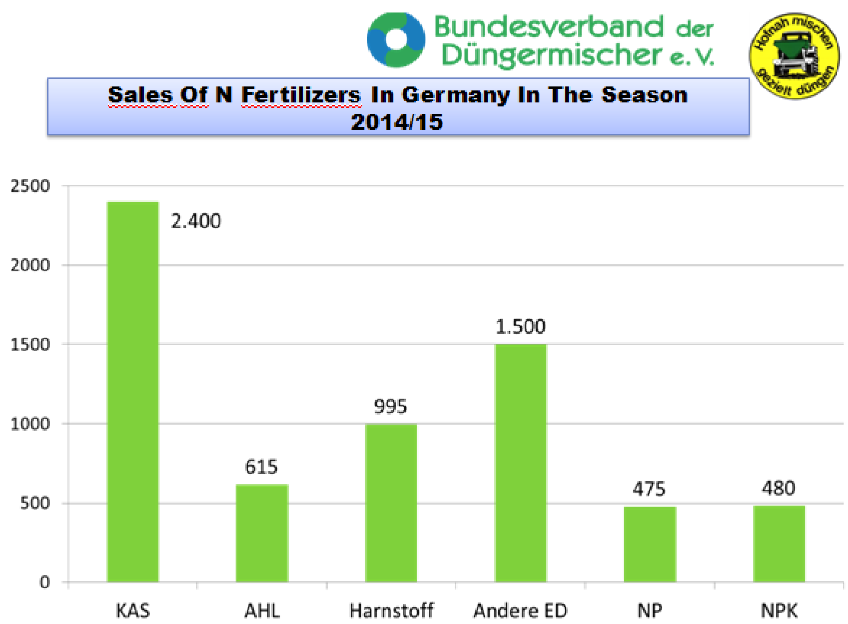
Jo GILBERTSON was of the opinion that you need to have this information available. It does not have to be printed on the bag. He is awaiting clarification on this point.

➔ GERMANY – BVDM : Dr Jörg-Ulrich DREWS *and the German market*

Bundesverband der Düngermischer e. V.

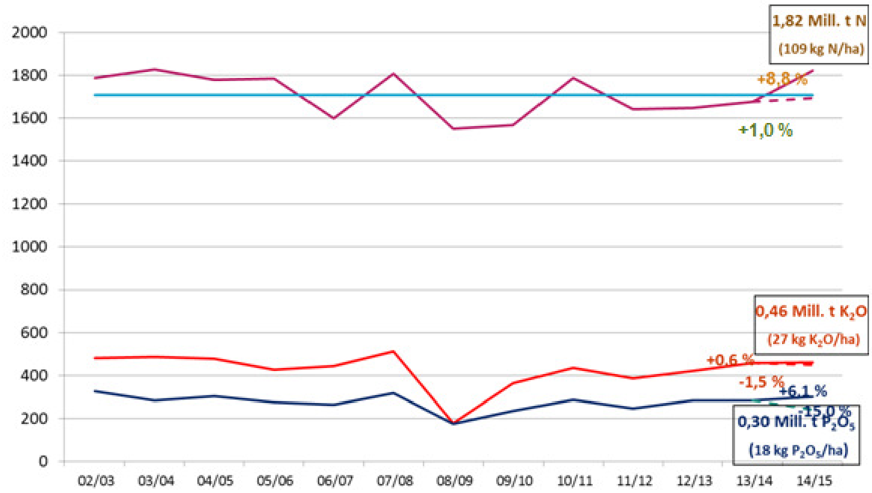
(Figures of the German fertiliser market were presented (ref PowerPoint annexed))





Bundesverband der Düngermischer e. V.

Sales of Mineral Fertilizers in Germany



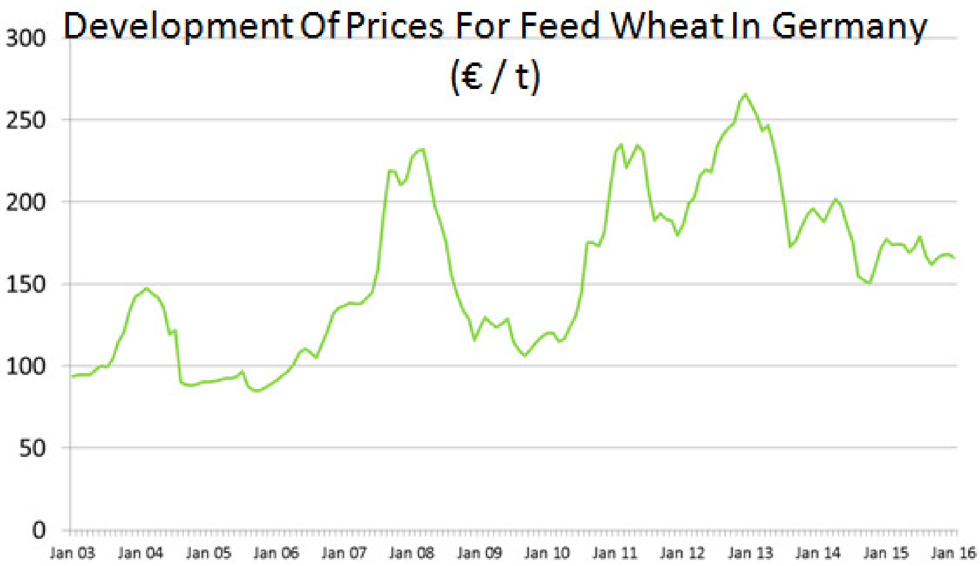
Bundesverband der Düngermischer e. V.

New Regulations-Less Application Of Mineralfertilizers as from 2017

Regulation / Restriction*	Expected effect
Control and Reduction of N-account surpluses	- Decrease in consumption of mineral N - Urea more affected than nitrates
Limited fall fertilization	- more manure in the spring
- Less manure application per ha - Maximum organ. Fertilizer 170 kg N, incl. Biogas slurry - P withdrawal fertilization in D,E(levels) - Reduction of P-surplus	- Slurry transport in agricultural areas - less P requirement - other NP and NPK formulas
Improved manure application technique	- higher efficiency leads to lower demand for mineral N
Higher calculated N-effect of manure	- lower Mineral supplements

Bundesverband der Düngermischer e. V.

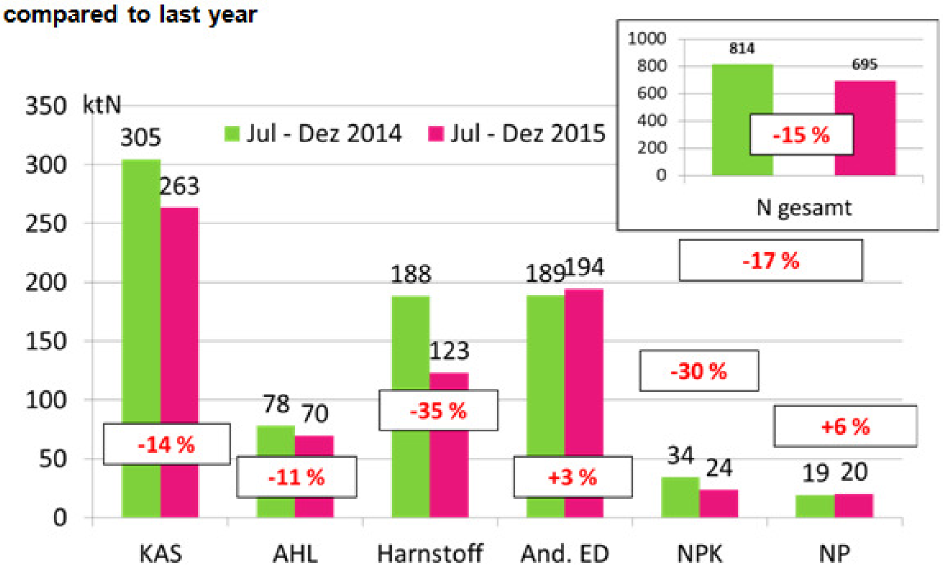
Hofnah mischen gezielt düngen



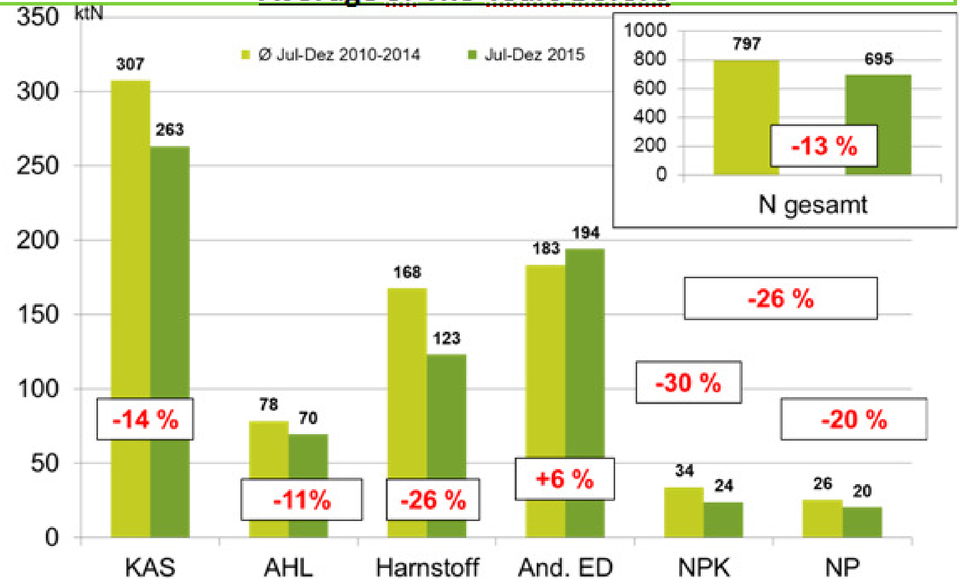
Bundesverband der Düngermischer e. V.

Hofnah mischen gezielt düngen

Sales of nitrogen fertilizers in Germany from July to December 2015, compared to last year



Sales Of N-Fertilizers In D. July- Dec. 2015 In Comparison To The Average of The Years Before



Sales N fertilizers season 2015/16 versus previous year

1.000 t N	Juli - Februar		Veränderungen	
Produkte	2014/15	2015/16	Menge	%
KAS	388	345	-43	-11%
AHL	95	89	-6	-6%
Harnstoff	309	247	-62	-20%
andere END	262	260	-2	-1%
NK/NPK-Dünger	52	42	-10	-19%
NP-Dünger	56	48	-8	-14%
	1162	1031	-131	-11%

Datenquelle: III. Quartal und IV. Quartal Stat. Bundesamt - Januar und Februar Umfrageergebnis

Fertilizer Control in Germany

	Anzahl Antw.	Anzahl Kontrolle pro Firma	Probenahme	Fachgerecht	Analysergebn.	Bücherkontr.	Rechn.	Betrag
Baden-Württemberg	4	3 1xjährl; 1xnie	s; 3-4; 2xk.A.	2xja; 2x k.A.	3xN; 1xk.A.	3xN;1xk.A.	3xN; k.A.	3xN; k.A.
Bayern	7	6 1xjährl; 1 2xjährl.	1k.A.; 6x2bis 10	alle	nein	1xja; 6xN	nein	0
Berlin	0							
Brandenburg	0							
Bremen	0							
Hamburg	0							
Hessen	2	1 1x jährl. 3 3x jährl.	1bis 10	2x ja	nein	nein	nein	0
Mecklenburg-Vorpommern	0							
Niedersachsen	9	6xs;2x N; 1x unregelmäßig	2xN, 3xk.A.;3x ja	3xk.A.;3xja;3xN	3xk.A.;4xN;2xja	3xk.A.;6xN	3k.A.;6xN	0
Nordrhein-Westfalen	1	2x	nein	0	0	0	nach Aufw.	372
Rheinland-Pfalz	2	3x jährlich	ja bis zu 4	ja	nein	nein	nein	0
Saarland	0							
Sachsen	1	1x jährlich	ja 3bis 4	ja	ja	nein	nein	0
Sachsen-Anhalt	1	1x jährlich	ja 3bis 5	ja	nein	nein	nein	0
Schleswig-Holstein	3	1xalle5 Jahre 2x 1bis2 jährl.	1x2;1x4bis6;bis10	2xja;1xk.A.	nein	2xnein;1xja	3xN;	0
Thüringen	0							
Bundesgebiet	30							
Österreich	1	alle5 bis 10 Jahre	ja2bis 4	ja	nein	nein	nein	0
			s= selten		N= nein			
Fazit:			k.A.= keine Aussage					

Die Düngemittelverkehrskontrolle wird offensichtlich sehr unterschiedlich ausgeführt.

Die Auswertung bietet nicht zuletzt aufgrund der geringen Teilnehmerzahl bei der Umfrage keine Ansatzpunkte für ein Einschreiten seitens des Verbandes.

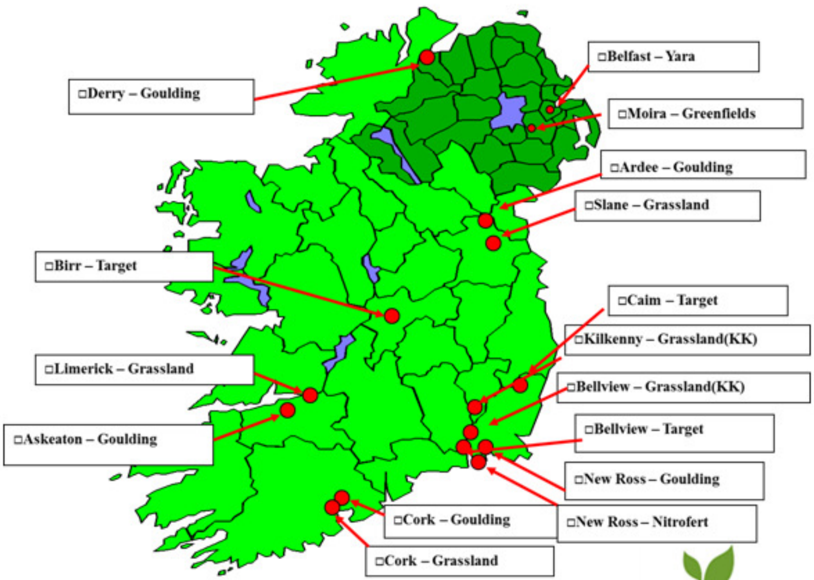
➔ ***Kevin McARDLE : IFMA and the IRISH market***

IFMA MEMBERS 2016

- Goulding Chemicals (Owner Origin Enterprises PLC).
- Grassland Agro.(50% Roulier & 50% CEO & CFO).
- Grassland Fertilizers (KK) Walsh Family + Glanbia.
- Target Fertilizers. (Cooney Group + Grennan Group.

Industry profile

- 12 Wholesale Blending & bagging Plants ROI, 3 NI.
- Blending / Packing Operations.
- 60% of Fert. Sales in 2 months. Little forward buying.
- 200 Retail locations.
- Over 70% of Product goes direct from plant to farm.
- 139.000 family farms.
- Average farm size 35 ha’s.



Land use in Ireland

- Total Land area 6.9m ha's
- Agricultural use 4.5m ha's
- Forestry use .73m ha's
- 81% of Agricultural area in Pasture, hay, Grass Silage.
- 11% in rough grazing .5m ha's
- 8.2% in arable, fruit & horticulture. .37m ha's
- Cereals .307m ha's.

Overview of Market ROI

2014/2015	**1,395,000**
2013/2014	1,402,000
2012/2013	1,487,000
2011/2012	1,220,000
2010/2011	1,267,000
2009/2010	1,420,000
2008/2009	1,170,000
2007/2008	1,240,000
2006/2007	1,330,000
2005/2006	1,440,000
2004/2005	1,480,000
2003/2004	1,530,000
1995/1996	**1,920,000**

Fertilizer Sales Nutrient tonnes

Year	N	P	K
2010	362,000	29,340	75,000
2011	314,000	28,775	73,000
2012	300,000	27,421	81,000
2013	283,000	37,000	93,000
2014	332,000	36,000	94,000
2015	331,000	37,000	94,000

7

Fertiliser use by product in 2015

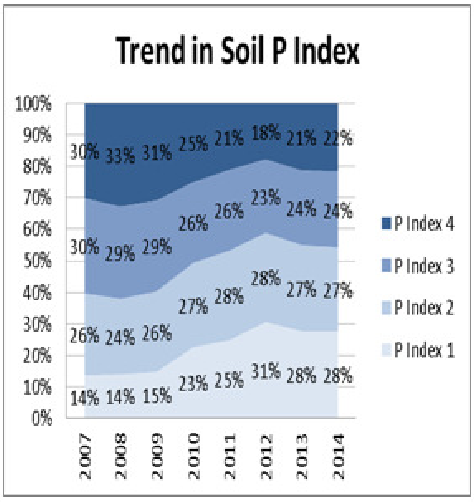
Product	% of Market
CAN	35
Urea	6
CCF	25
All Blends	33
P (straight)	0.3
K (straight)	0.7

Grassland v Arable in Ireland

	% ha's	%N	%P	%K	Overall
Grassland	90	85	66	76	82
Arable	10	15	34	24	18

9

Soil P – Grassland Soils 2015



55% in Index 1 & 2 (2014)

61% in Index 1 & 2 (2015)

22% in Index 3 (2015 -2%)

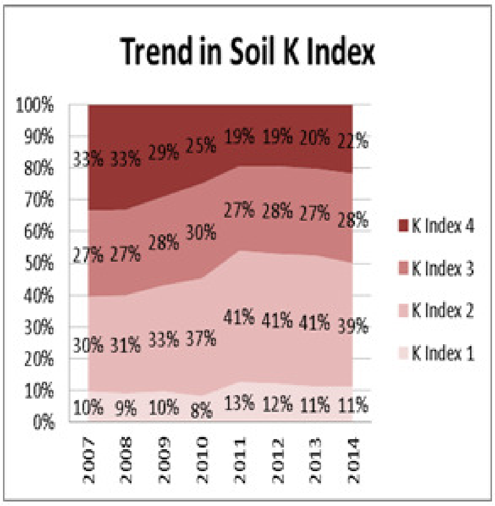
17% in Index 4 (2015 -5%)

Major Concern.

Target Index 3

10

Soil K - Grassland Soils 2015



50% in Index 1 & 2 '14

54% in Index 1 & 2 '15

26% in Index 3

20% in Index 4

A reversal of the trend in last 2/3 year.

Target Index 3

IFMA

11

FOOD HARVEST 2020 - IRELAND

Food Harvest 2020 - Targets

Using reference years 2007 – 2009

- ✓ Milk Target 50% Growth. (Volume) Almost ½ way there
- ✓ Beef Target 20% Growth (Value)Revised to 40% Over ½ way
- ✓ Sheep Target 20% Growth (Value)
- ✓ Pig Target 50% Growth (Value)

Food wise 2025

Objective :

- ✓ Increase Value of Food Export by 85% to €19 Billion
- ✓ Increase value added in Agri food, fisheries, Wood products by 70% to €13 Billion
- ✓ Increase Primary Production by 65% to €10 Billion
- ✓ Create 23,000 jobs in the Agri & Agri food Supply chain.

Teagasc

Technology Foresight 2035 Project

Objective :

"Identification of key technologies that drive the competitiveness and sustainable growth of the Irish Food sector over the next 20years"

➔ ***Pier Luigi GRAZIANO : AIF and the Italian market***

Associazione Italiana Fertilizzanti

AIF Associates

- 200 “fertiliser manufacturers” of which 8 blended fertiliser companies producing about 50% of total blended fertilisers

Mineral fertilisers in Italy 2014
Official data

Straight :

✓ N 1,064,718 t (-0.4%)

✓ P 97,195 t (+19.6%)

✓ K 72,468 t (+26.7%)

Compound :

✓ NPK 644,088 t (-8.9%)

Total : 1,894,251 t (-2.2%)

Blended fertilisers in Italy
2006-2015 (t x 1000)

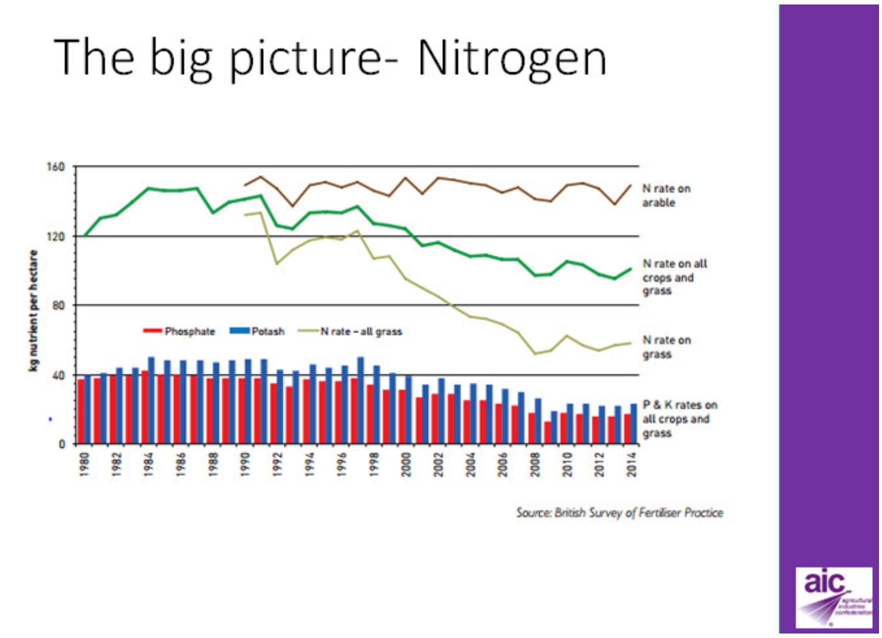
2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016
250	330	300	180	140	190	190	150	150	150	140

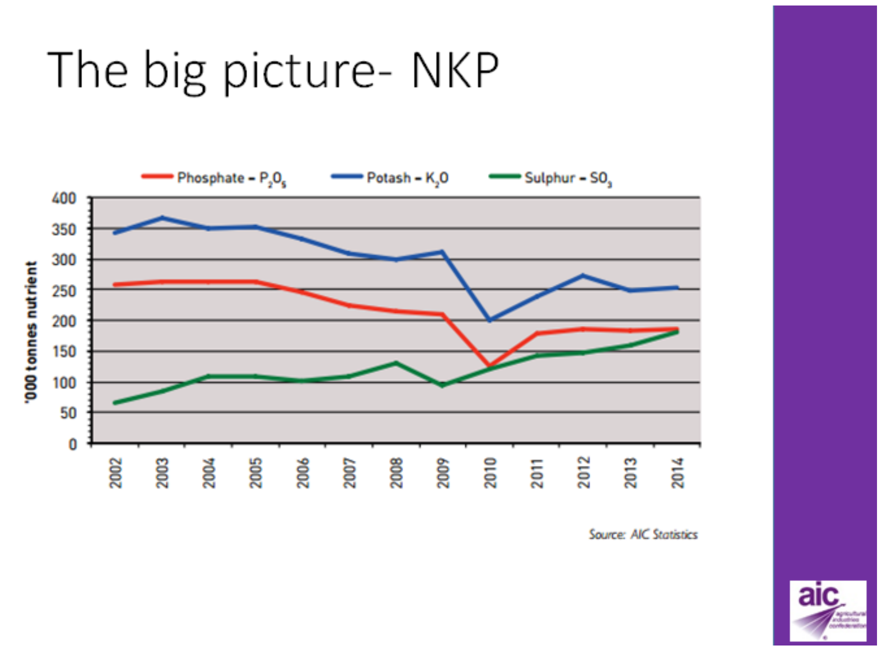
Comments :

- Trend to use straight instead NPK formulations
- NPK just blends, no more complex
- Manufacturers, traders and dealers interested mainly in commercial aspects
- Farmers look for cheap formulations
- “Miracle” formulations popular in spite of their higher cost
- Public technical assistance almost disappeared

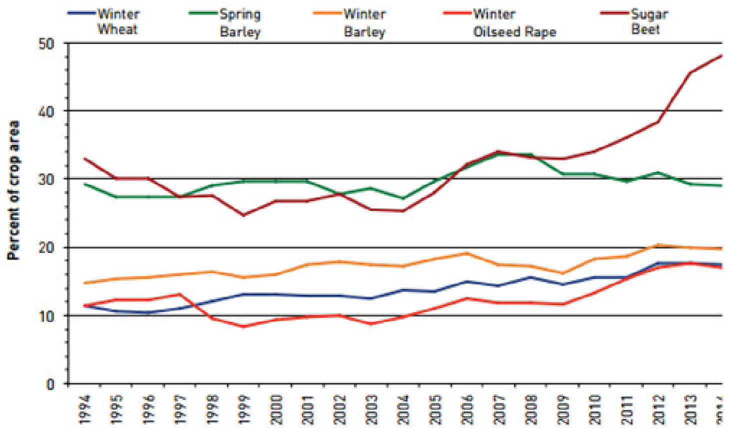
→ ***Jo GILBERTSON– A.I.C. and the British market***

AIC Statistics Review



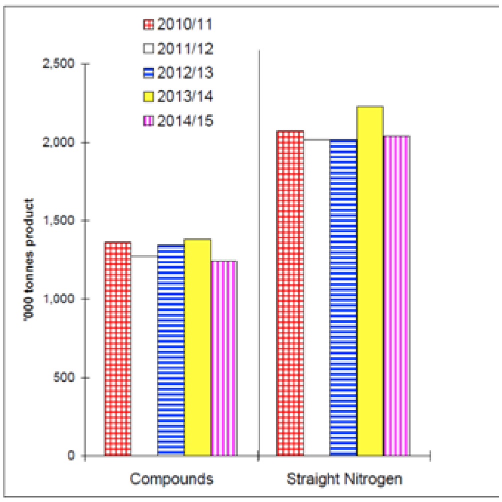


The big picture- manure



Source: British Survey of Fertiliser Practice

The big picture- Current Mkt.

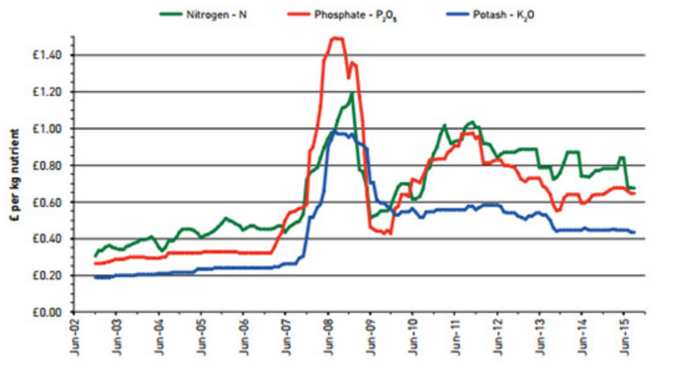


Detail

'000 TONNES PRODUCT

		Great Britain
Compounds	2010/11	1,363
	2011/12	1,275
	2012/13	1,346
	2013/14	1,381
	2014/15	1,242
Straight Nitrogen	2010/11	2,072
	2011/12	2,020
	2012/13	2,016
	2013/14	2,229
	2014/15	2,043

The big picture- price volatility



Sources: Trade data

Summary -What's new in UK?

- Fierce competition for market share – making companies 'have a go at each other' – it is a side show and it will pass… Visible competition is good from regulators point of view
- No support for Irish farmers claim about unfair competition / tariffs – UK position is very anti Russian because of Ukraine
- 67 locations 'manufacturing', or blending fertiliser in UK
- 38 ports licenced for major AN imports from 15 countries
- 300 merchants
- Urea seeing increasing use /acceptance

➔ ***Maarten Brand : NVB and the Dutch market***

(Overview of the European blending market in 2008-2012).

NEDERLANDSE VERENIGING
VOOR BLENDERS VAN
MESTSTOFFEN

(N.V.B.)

(KvK Rotterdam nr. 23092701)

Overview on the European Blending Market in 2009-2015			**Input from the Netherlands :**	
Consumption (1000 tonnes of nutriënts) :			(source : Fertilizers Europe)	
	N	**P2O5**	**K2O**	**Total**
2009/2010	239	24	35	298
2011/2012	233	23	39	295
2013/2014	195	13	23	231
2014/2015	220	13	31	264
2015/2016	220	12	31	263
Inland sales of chemical fertilizers (1000 tonnes of nutriënts) :				(source : NL /LEI)
	N	**P2O5**	**K20**	**Total**
2009	225,7	9,9	18,4	254,0
2011	214,1	14,9	23,0	252,0
2013	230,3	9,7	32,0	272,0
2014	221,5	12,5	42,8	276,8
Inland sales of N, P and K in mixed fertilizers (1000 tonnes of p			*nutrients*	(source : NL/LEI)
	N	**P2O5**	**K2O**	**Total**
2009	19,0	8,6	6,3	33,9
2011	27,3	12,3	6,3	45,9
2013	25,6	7,6	12,3	45,5
2014	32,9	10,0	20,0	62,9

inland sales of N, P and K in mixed and blends (1000 tonnes of products) (source : NL/NVB)					
	straight	mixed	**blend *)**		totaal
2009	732 000	34 000	**85 000**	**10%**	851 000
2011	672 000	46 000	**62 000**	**8%**	780 000
2013	738 000	45 000	**73 000**	**8,50%**	856 000
2014	751 000	54 000	**84 000**	**9,50%**	889 000
2015				**10,0 % ?**	

*) export non inclus

Dutch forecast fertilizer consumption in the next five years:
It is expected that the Recycling Indicator (Dutch : KringloopWijzer) will become compulsory for all (dairy) farmers. This administrative tool enables dairy farmers to optimize their business operations. In addition, it also enables them to achieve responsible development of their business within specified environmental constraints.

The Recycling Indicator is one of the answers of farmers to more tight application standards on both N and P_2O_5, due to the Fifth Action Programme concerning the Nitrate Directive. This Action Programme could also lead to shifting cropping patterns in certain areas. Whether these changes of cropping patterns will have substantial impact on the fertilizer consumption remains to be seen as alternative crops needs their nutrients as well.

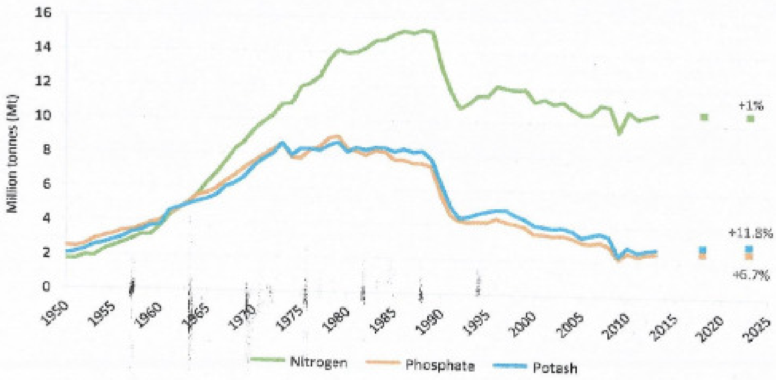
info from FE distributed to the Netherland and other countries /mail 07-03-2016
advise : share information about New Fertilizers Regulation developments.

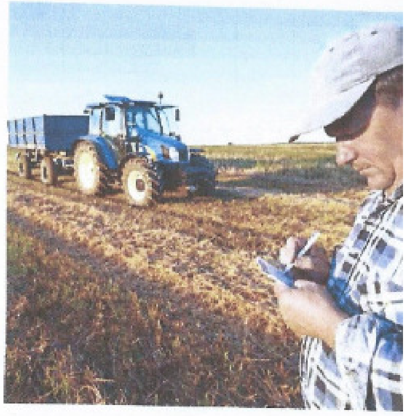
FE : Forecast of food, farming and fertilizer use in the European Union 2013-2023
changes in regional fertilizer use and fertilizer use by crop
fertilizer consumption in the EU / 1950 - 2025

2013/2025 NL

fertilizers europe

Fertilizer consumption in the EU





Over the year, fertilizers containing an average* of 10.5 million tonnes of nitrogen, 2.5 million tonnes of phosphate, and 2.7 million tonnes of potash were applied to 133.5 million hectares of farmland. 47.4 million farmable hectares were not fertilized.

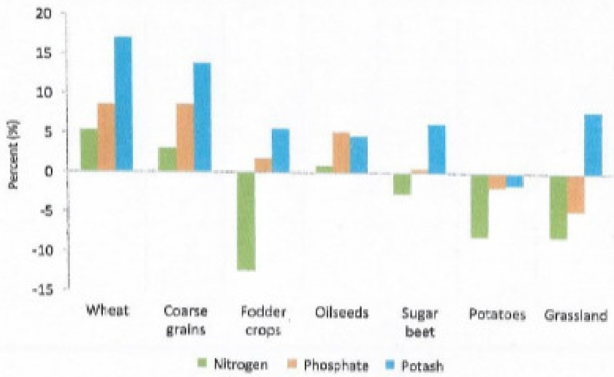
Considering the economic outlook and the anticipated evolution of Europe's cropping area, Fertilizers Europe expects annual nitrogen, phosphate and potash fertilizer consumption to reach 10.6, 2.6 and 3 million tonnes respectively by the 2022/2023 season, applied to 133 million hectares of farmland.

Despite these increases, fertilizer consumption over the next 10 years will remain below the more normal levels recorded immediately prior to the 2008/2009 economic crash.

* Average based on the last three growing seasons - 2010/2011, 2011/2012, 2012/2013.

fertilizers europe

Changes in fertilizer use by crop 2013-2023



The sustained high yield in the grain area will lead to an increase in nutrient consumption (N+P+K) of around 6% for cereals. There will be a similar evolution for oilseeds with an expected increase of 2% (a slower pace compared to the 11% increase foreseen last year).

Nutrient consumption will decrease by 5% overall for fodder crops, as an impact of the expected abolition of milk quotas which should induce a trend towards greater productivity. The declining yield in the sugar beet area induces a moderate increase of 1% in fertilizer consumption for this crop.

At the same time, the decrease for grassland is now foreseen at around 5%.

Country: Netherlands

Crop	Area ('000 ha)					
	Ref. **	2013/14	2014/15	2015/16	2019/20	2020/21
Arable land						
Wheat	144	142	130	130	130	130
Barley	29	28	28	28	28	25
Rye, triticale, oats, rice	5	4	4	4	4	4
Grain maize, including corn cob maize	20	19	19	19	10	10
Other cereal	0					
Total Cereals	198	193	180	180	169	169
Oilseed rape	4	4	3	2	3	3
Sunflower, soya, linseed	2	2	2	2	2	2
Pulses (peas, beans)	3	3	3	3	3	3
Potato	155	155	154	155	160	145
Sugar beet	75	75	73	75	73	73
Vegetables	41	41	40	40	38	38
Other (including tobacco, hoppe, ..)	0					
Fodder (legumes)	1	1	1	1	1	1
Fodder (other)	5	5	5	5	5	5
Silage maize	230	230	230	230	250	250
Short rotation coppice	3	3	3	3	3	3
Perennial herbaceous crops (Miscanthus, etc.)	0					
Maize for biogas	5	5	5	5	5	5
Non-fertilised arable land (including fallow land)	0	0	0	0	10	10
TOTAL ARABLE LAND	739	726	739	717	713	702
Permanent crops (fruit, vineyard)	19	19	19	19	20	20
Other permanent crop	0					
Grassland fertilised	977	993	998	1000	960	960
Grassland non-fertilised	52	52	53	54	54	54
Total Grassland	1029	1045	1051	1054	1014	1014
AGRICULTURAL AREA IN USE	1777	1790	1790	1790	1747	1741
Idle land*						
TOTAL AGRICULTURAL AREA	1777	1790	1790	1790	1747	1741
Fertilised forests	0					

Crop	Yield (kg/ha)					
	Ref. **	2013/14	2014/15	2015/16	2019/20	2020/21
Wheat	9000	9000	9000	9000	9000	9100
Barley	6200	6200	6200	6200	6500	6600
Rye, triticale, oats, rice	5300	5300	5300	5000	5400	5600
Grain maize, including corn cob maize	11000	11000	11000	11000	11000	11000
Other cereal	0					
Total Cereals	8733	8714	8769	8700	8683	8787
Oilseed rape	4233	4200	4200	4200	4200	4500
Sunflower, soya, linseed	1000	1000	1000	1000	1040	1040
Pulses (peas, beans)	3750	3750	3750	3750	3800	3800
Potato	48000	48000	48000	48000	49000	50000
Sugar beet	72000	72000	72000	72000	73000	76000

Crop	Production (kt)					
	Ref. **	2013/14	2014/15	2015/16	2019/20	2020/21
Wheat	1288	1278	1201	1242	1170	1183
Barley	178	174	174	174	183	168
Rye, triticale, oats, rice	25	21	21	21	22	22
Grain maize, including corn cob maize	220	209	209	209	110	110
Other cereal		0	0	0	0	0
Total Cereals	1721	1682	1656	1646	1484	1483
Oilseed rape	15	17	13	8	13	13
Sunflower, soya, linseed	2	2	2	2	2	2
Pulses (peas, beans)	11	11	11	11	11	11
Potato	7440	7440	7392	7440	7840	7260
Sugar beet	5370	5400	5472	5472	5329	5475

* fallow and/or land temporarily not used, but NOT with compensatory payment

** Average value of the last three completed campaigns: from 2012/13 to 2014/15

Country: Netherlands

Crop	Ref. **	Nitrogen (N) application (kg/ha) 2013/14	2014/15	2015/16	2019/20	2024/25
Arable land						
Wheat	185	185	185	185	185	180
Barley	100	100	100	100	100	95
Rye, triticale, oats, rice	100	100	100	100	100	90
Grain maize, including corn cob mix	35	35	35	35	35	30
Other cereal	0					
Total Cereals	156	166	156	156	162	157
Oilseed rape	175	175	175	175	175	175
Sunflower, soya, linseed	0					
Pulses (peas, beans)	20	20	20	20	20	20
Potato	145	145	145	145	145	145
Sugar beet	100	100	100	100	95	95
Vegetables	150	150	150	150	150	150
Other (including tobacco, poppy, ..)	80	80	80	80	80	80
Fodder (legumes)	38	38	38	38	37	37
Fodder (other)	28	28	28	28	28	28
Silage maize	35	35	35	35	30	26
Short rotation coppice	0					
Perennial herbaceous crops (Miscanthus, etc.)	0					
Maize for biogas	35	35	35	35	35	30
Non-fertilized arable land (including Set-aside)	0					
TOTAL ARABLE LAND	164	165	165	164	160	87
Permanent crops (fruit, vineyard)	50	60	50	50	50	50
Other permanent crop	0	0	0	0	0	0
Grassland fertilized	140	145	145	145	140	135
Grassland non fertilized						
Total Grassland	136	138	138	138	133	120
AGRICULTURAL AREA IN USE	122	124	124	124	118	114
Idled land*						
TOTAL AGRICULTURAL AREA						
Fertilized forests	0					

Crop	Ref. **	Phosphorus (P2O5) application (kg/ha) 2013/14	2014/15	2015/16	2019/20	2024/25
Wheat	4	4	4	4	4	4
Barley	4	4	4	4	4	4
Rye, triticale, oats, rice	3	3	3	3	3	3
Grain maize, including corn cob mix	11	11	11	11	10	10
Other cereal	0					
Total Cereals	5	5	5	5	4	4
Oilseed rape	20	20	20	19	19	19
Sunflower, soya, linseed	0					
Pulses (peas, beans)	40	40	40	35	35	35
Potato	50	50	50	45	50	45
Sugar beet	20	20	20	20	20	20
Vegetables	37	37	37	34	36	34
Other (including tobacco, poppy, ..)	15	16	16	15	15	15
Fodder (legumes)	19	19	18	18	18	18
Fodder (other)	7	7	7	7	7	7
Silage maize	7	8	8	5	4	4
Short rotation coppice	0					
Perennial herbaceous crops (Miscanthus, etc.)	0					
Maize for biogas	14	14	14	14	14	14
Non-fertilized arable land (including Set-aside)	0					
TOTAL ARABLE LAND	19	18	19	17	17	10
Permanent crops (fruit, vineyard)	27	27	26	25	24	23
Other permanent crop	0					
Grassland fertilized	0	3	0	0	0	0
Grassland non fertilized		0				
Total Grassland	0	0	0	0	0	0
AGRICULTURAL AREA IN USE	8	8	8	7	7	7
Idled land*						
TOTAL AGRICULTURAL AREA						
Fertilized forests	0					

Crop	Ref. **	Potassium (K2O) application (kg/ha) 2013/14	2014/15	2015/16	2019/20	2024/25
Wheat	5	5	5	5	5	5
Barley	5	5	5	5	5	5
Rye, triticale, oats, rice	5	5	5	5	5	5
Grain maize, including corn cob mix	10	10	10	10	10	10
Other cereal	:					
Total Cereals	6	5	6	5	5	6
Oilseed rape	23	23	23	23	23	23
Sunflower, soya, linseed	:					
Pulses (peas, beans)	63	63	63	63	63	63
Potato	70	70	70	70	70	70
Sugar beet	50	50	50	50	50	50
Vegetables	65	65	65	65	65	65
Other (including tobacco, poppy, ..)	60	60	60	60	60	60
Fodder (legumes)	65	65	65	65	65	65
Fodder (other)	38	38	38	38	40	40
Silage maize	10	10	10	10	10	10
Short rotation coppice	:					
Perennial herbaceous crops (Miscanthus, etc.)	:					
Maize for biogas	10	10	10	10	10	10
Non-fertilized arable land (including Set-aside)	:					
TOTAL ARABLE LAND	33	33	33	33	33	33
Permanent crops (fruit, vineyard)	65	65	65	65	65	65
Other permanent crop	:					
Grassland fertilized	8	8	8	8	8	8
Grassland non fertilized		0				
Total Grassland	8	8	8	8	8	8
AGRICULTURAL AREA IN USE	17	18	17	17	18	17
Idled land*						
TOTAL AGRICULTURAL AREA						
Fertilized forests	:					

* fallow arable land temporarily not used, but NOT with compensatory payment

** Average value of the last three completed campaigns: from 2012/13 to 2014/15

Country: Netherlands

Crop	Ref. **	Nitrogen (N) consumption (kt) 2013/14	2014/15	2015/16	2019/20	2024/25
Arable land						
Wheat	27	26	25	26	24	23
Barley	3	3	3	3	3	2
Rye, triticale, oats, rice	0	0	0	0	0	0
Grain maize, including corn cob mix	1	1	1	1	0	0
Other cereal		0	0	0	0	0
Total Cereals	31	30	30	29	27	26
Oilseed rape	1	1	1	0	1	1
Sunflower, soya, linseed		0	0	0	0	0
Pulses (peas, beans)	0	0	0	0	0	0
Potato	22	23	22	22	22	21
Sugar beet	7	8	8	8	7	7
Vegetables	6	6	6	6	6	6
Other (including tobacco, poppy, ..)		0	0	0	0	0
Fodder (legumes)	0	0	0	0	0	0
Fodder (other)	0	0	0	0	0	0
Silage maize	8	8	8	8	8	8
Short rotation coppice		0	0	0	0	0
Perennial herbaceous crops (Miscanthus, etc.)		0	0	0	0	0
Maize for biogas	0	0	0	0	0	0
Non-fertilized arable land (including Set-aside)						
TOTAL ARABLE LAND	75	70	74	74	79	87
Permanent crops (fruit, vineyard)	1	1	1	1	1	1
Other permanent crop		0	0	0	0	0
Grassland fertilized	140	144	145	145	134	130
Grassland non fertilized						
Total Grassland	140	144	145	145	134	130
AGRICULTURAL AREA IN USE	217	221	220	220	206	150
Idled land*						
TOTAL AGRICULTURAL AREA	217	221	220	220	206	158
Fertilized forests		0	0	0	0	0
TOTAL FERTILIZER CONSUMPTION	217	221	220	220	206	158

Crop	Ref. **	Phosphorus (P2O5) consumption (kt) 2013/14	2014/15	2015/16	2019/20	2024/25
Wheat	1	1	1	1	1	1
Barley	0	0	0	0	0	0
Rye, triticale, oats, rice	0	0	0	0	0	0
Grain maize, including corn cob mix	0	0	0	0	0	0
Other cereal		0	0	0	0	0
Total Cereals	1	1	1	1	1	1
Oilseed rape	0	0	0	0	0	0
Sunflower, soya, linseed		0	0	0	0	0
Pulses (peas, beans)	0	0	0	0	0	0
Potato	8	8	8	7	8	7
Sugar beet	1	2	2	2	1	1
Vegetables	2	2	1	1	1	1
Other (including tobacco, poppy, ..)		0	0	0	0	0
Fodder (legumes)	0	0	0	0	0	0
Fodder (other)	0	0	0	0	0	0
Silage maize	2	1	1	1	1	1
Short rotation coppice		0	0	0	0	0
Perennial herbaceous crops (Miscanthus, etc.)		0	0	0	0	0
Maize for biogas	0	0	0	0	0	0
Non-fertilized arable land (including Set-aside)						
TOTAL ARABLE LAND	14	13	13	12	12	11
Permanent crops (fruit, vineyard)	1	1	0	0	0	0
Other permanent crop		0	0	0	0	0
Grassland fertilized		0	0	0	0	0
Grassland non fertilized						
Total Grassland		0	0	0	0	0
AGRICULTURAL AREA IN USE	14	14	14	13	13	12
Idled land*						
TOTAL AGRICULTURAL AREA	14	14	14	13	13	12
Fertilized forests		0	0	0	0	0
TOTAL FERTILIZER CONSUMPTION	14	14	14	13	13	12

Crop	Ref. **	Potassium (K2O) consumption (kt) 2013/14	2014/15	2015/16	2019/20	2024/25
Wheat	1	1	1	1	1	1
Barley	0	0	0	0	0	0
Rye, triticale, oats, rice	0	0	0	0	0	0
Grain maize, including corn cob mix	0	0	0	0	0	0
Other cereal		0	0	0	0	0
Total Cereals	1	1	1	1	1	1
Oilseed rape	0	0	0	0	0	0
Sunflower, soya, linseed		0	0	0	0	0
Pulses (peas, beans)	0	0	0	0	0	0
Potato	11	11	11	11	11	10
Sugar beet	4	4	4	4	4	4
Vegetables	3	3	3	3	3	3
Other (including tobacco, poppy, ..)		0	0	0	0	0
Fodder (legumes)	0	0	0	0	0	0
Fodder (other)	0	0	0	0	0	0
Silage maize	2	2	2	2	3	3
Short rotation coppice		0	0	0	0	0
Perennial herbaceous crops (Miscanthus, etc.)		0	0	0	0	0
Maize for biogas	0	0	0	0	0	0
Non-fertilized arable land (including Set-aside)						
TOTAL ARABLE LAND	22	22	22	22	21	21
Permanent crops (fruit, vineyard)	1	1	1	1	1	1
Other permanent crop		0	0	0	0	0
Grassland fertilized	8	8	8	8	8	8
Grassland non fertilized						
Total Grassland	8	8	8	8	8	8
AGRICULTURAL AREA IN USE	31	31	31	31	30	30
Idled land*						
TOTAL AGRICULTURAL AREA	31	31	31	31	30	30
Fertilized forests		0	0	0	0	0
TOTAL FERTILIZER CONSUMPTION	31	31	31	31	30	30

* fallow arable land temporarily not used, but NOT with compensatory payment

** Average value of the last three completed campaigns: from 2012/13 to 2014/15

➔ ***Pierre-François DUMAS - AFCOME and the French market***

AFCOME
Association Française de Commercialisation et de Mélange d'Engrais

Short presentation of AFCOME

22 members
⇨ 15 cooperatives or union of cooperatives,
⇨ 7 distributors or private wholesalers.
↳ Over 6 million tons of fertilizers distributed.

↳ About 600.000 tons of blended fertilizers produced.

⇨ AFCOME represents about 75% of the market for mineral fertilizers distributed in France and over 85% of blended fertilizers produced in France.

Members' map

French Market

⇨ 2015 (source : INSEE)
Decrease of agricultural production in 2015 (-1,5%) especially for vegetal productions.
Light increase of production for cereals in volumes.
Average yields are similar to 2014.
⇨ strong production of wheat, soft wheat and barley due to favorable climate conditions (mild winter + warm and sunny spring).
⇨ decline in output for corn (-27%) due to heat waves and drought.

Global increase of agricultural production in value of 0,5% compared to 2015.
⇨ Increase of prices for vegetal production of 7% (corn, potatoes, grains and oilseeds).
⇨ Decrease of prices for animal production of 6% (milk, pigs, veal).

Agricultural inputs

Reduction of energy and feed costs.
Fertilizers and soil improvers : reduction of the volumes consumed (-2%) and price increase of 1,5%.
⇨ prices recover for straight N and compounds fertilizers after a decrease in 2014, and still decline very slowly for straight P and K.

French Market

⇨ Actual campaign

Very difficult economical context for farmers and especially for stock farmers → gloomy mood with cash flow problems.
Bird flu in south-West of France stopped sector's activity during a few months leading to a reduction of seeds and grain purchases.
Increase of regulatory pressure on corp protection products and on ammoniacal emissions for agricultural sector (air pollution and greenhouse gaz).

Priority is given to nitrogen fertilizers with a decrease of NPK and stability for PK.
↳ Increase of UAN and alternative/new fertilizers.
↳ Decrease of blended fertilizers in some areas of France.

Price decrease of 6% for fertilizers and soil improvers over 1 year.

<u>Deliveries :</u>
For the 6 first months of this campaign, increase of 3% compared with the same period last year.
In the opposite, potash deliveries decreased of 6% on the 8 first months of 2015-2016 campaign.

AFCOME's main actions in 2015/2016

✓ **Regulatory compliance and good practices**

- Development of a detailed index/catalogue of mandatory requirements and good practices for each step of the distribution, packaging and/or blending process.

- Creation of a diagnostic tool to evaluate compliance to regulation and good practices.

- Forward, project of a charter with commitment of signatories.

- Active involvement in elaboration of French regulations related to fertilizers → *actual subjects : storage of AN fertilizers, NH4 emissions, greenhouse gaz, Borates, Cadmium, biostimulants…*

✓ **Quality improvement**

- Development of an IT sieve analysis tool.
- New working group on physical characteristics of blends about to start.

✓ **<u>Economy</u>**

Development of a model of contract for the improvement of commercial relationships between Afcome members and their providers.

✓ **International level**

- International Meeting « Rencontres Internationales » in Reims in October 2015 (Next meeting in 2017).
- Organization of a study tour in France in October 2015 for FeRN (Fertilizer Retailers Network) members from USA and Brazil
- Affiliate member of IFA since 2015

4th POINT : OTHER ACTIVITIES REPORTS

Cadmium.

There was also a full discussion on The Cadmium Limits in the New Regulations. EFBA and a number on National bodies have made submissions to the commission on this limit. Kevin McArdle gave details of a number of scientific studies which do support a higher limit than that in the Regulations.

The most recent study By Smolders and Six in 2013 concluded that at 80mg Cd /Kg P2O5 in phosphate fertilizers that Cd would not increase in European soils over time. The full detail of this argument is contained in the EFBA submission to the Commission.

CEN/TC 260

Estelle VALLIN gave a detailed account of the work going on in CEN/TC 260. Many of the materials that can be used to develop a fertilising product as envisaged in the regulations do not have harmonised analytical standards and CEN is working hard to develop such standards.

In the meantime, Jo GILBERTSON & Estelle VALLIN said that you can work with your national analytical standard and still comply with the regulations and this situation will continue until New Harmonised analytical standards are developed.

Maarten BRAND said that the Dutch Government currently hold the Presidency of The EU and they are working with other member states in an attempt to complete the New Fertilizer Regulations and have them adopted by the Council and Parliament before their term of holding the Presidency ends in June 2016. They have set out a schedule of meetings every 2 weeks in order to achieve this. As decisions are now going to be taken by Member State representatives, it was felt that further representations, if they are required, should be directed at Member State representatives. And a number of countries indicated that they would make representation on Cadmium and Labelling.

YARA position.

Recently in the UK, YARA embarked on an advertising campaign which was designed to attack blending and the trust of this campaign amounted to an attack on the integrity of the UK Fias scheme.

EFBA were very concerned about this campaign as it was seen as a direct attack on the whole blending industry. The FIAS scheme is a voluntary quality assurance scheme and is owned and administered by AIC in the UK. Jo Gilbertson said that AIC are currently conducting a nation wide audit of its FIAS members and this should support the concept of blending. EFBA are happy to have AIC handle this issue and also to have it contained within the UK.

IFS Activities.

Maarten BRAND who is a council member of IFS gave an overview of IFS activities during the year. He presented a paper to EFBA members which outlines details of IFS conferences and other activities.

A copy of this paper is attached to this report. He indicated that IFS were for the 1st time holding one of their conference outside the UK. On June 23rd and 24th 2016 IFS will hold a Technical Conference in Budapest.

EFBA Handbook

For some time now, EFBA has been considering reprinting its Quality Handbook. A number of people who were approached about an update commented that this was an excellent publication and was in fact a credit to the blending Industry. It was felt by a number of members that this publication did not need much changing. It was an excellent publication as it was and needed to be made more available.

Estelle VALLIN and Jo GILBERTSON have undertaken some improvements already and these can be included. After some discussion it was felt that this Publication, when it is complete, should be put on the EFBA web site and be made available to blenders free of charge. This was agreed. Jo Gilbertson who already has a computer copy of the book undertook to complete the updates/changes that are required and committed AIC to fund it development for Web site inclusion. EFBA members very much appreciate this gesture.

Election of Secretary General.

At the last Annual General meeting Pierre-Francois Dumas indicated his intention to step down as Secretary General at the 2016 Annual meeting. This gave rise to an election of Secretary General at this meeting.
Estelle VALLIN was proposed by Kevin McArdle and seconded by Jo Gilbertson. As there were no other proposals Estelle VALLIN was elected Secretary General. The Chairman and the members congratulated Estelle VALLIN and wished her well in her new role as Secretary General.

New Members

There was a strong feeling from the group present that EFBA needed to expand its activities and attract more countries to become members. This would give the group a stronger voice in Europe. In particular, it was felt that Spain and Portugal should be encouraged to become members again. As EFBA has significantly increased its activity level in the last year it was felt that Spain in particular should be approached with a view to having them in as new members.

Pierre-Francois DUMAS undertook to investigate who is the correct person to contact in Spain in order to set up a meeting. The President Pier Luigi GRAZIANO and Kevin Mc Ardle were tasked with the responsibility for this work.

Any Other Business.

Venue and date for next Annual General Meeting. It was felt that it was the turn of Belgium to host the next Annual Meeting but this needs to be agreed with Pierre DETRY. The President will follow up on this at a later date.

Next Working EFBA meeting

Kevin McArdle indicated that the next DG working group meeting is tentatively set for November 7th 2016, so a EFBA working meeting was provisionally set for 10 O'Clock on Nov 8th in Brussels.

IFS Council.

Maarten BRAND is currently a member of the council of IFS and is due to finish his term of office later this yea. He felt it would be nice to have an EFBA council member also on the council of IFS. We do not automatically have this entitlement but Maarten BRAND was going to investigate the situation.

5th POINT : EFBA ACCOUNTANCY

Pierre-Francois DUMAS presented the annual accounts to the group. He also presented a budget for 2016 and as there was a significant surplus it was decided to leave the Annual subs as last year.

BALANCE SHEET ON 2015/12/31			
ITEM	ASSETS	ITEM	LIABILITIES
OWING TO EFBA		FREE CAPITAL ON 2015/01/01	26 714,76
DEBTORS MEMBERS			
OTHER DEBTORS			
		OTHER CREDITORS	
		PF DUMAS (SG Travel)*	675,87
		M. POZZO DI BORGO (INTERPRETATION)*	400,94
BANK ON 2015/12/31			
BANQUE POPULAIRE OCCITANE ALBI	36 851,66	FREE CAPITAL ON 2015/12/31	**35 774,85**
BALANCE		BALANCE	**9 060,09**
TOTAL	36 851,66	TOTAL	36 851,66

* PAID ON 03/2016 and 04/2016

PROFIT AND LOSS 2015 FROM JANUARY 1ST TO DECEMBER 31ST

ITEM	COSTS 2015	BUDGET 2015	ITEM	INCOMES 2015	BUDGET 2015
EFBA REPRESENTATION	**3 240,91 €**	**10 800,00 €**	**MEMBERS SUBSCRIPTIONS**	**21 000,00 €**	**21 000,00 €**
DG GROW	1 271,35 €	4 800,00 €	BELGIUM (UNGREN)	1 200,00 €	1 200,00 €
CEN TC	605,00 €	4 500,00 €	FRANCE (AFCOME)	5 700,00 €	5 700,00 €
IFS	1 364,56 €	1 500,00 €	GERMANY (BVDM)	3 900,00 €	3 900,00 €
CEN subscription	605,00 €		IRELAND (IFMA)	1 800,00 €	1 800,00 €
PRESIDENT TRAVEL EXPENSES	1 050,04 €		ITALIA (AIF)	3 200,00 €	3 200,00 €
DG GOW - EFBA REPRESENTANT TRAVEL	221,31 €		NETHERLAND (NVB)	1 300,00 €	1 300,00 €
CEN TC - EFBA REPRESENTANT TRAVEL	- €		UK (AIC)	3 900,00 €	3 900,00 €
I.F.S expenses (registrations + travel)	1 364,56 €		**DOCUMENTATION SOLD**	**- €**	**- €**
EFBA MEETINGS	**6 958,30 €**	**4 600,00 €**	Recovery from previous exercice :		
EFBA MEETING ACCOMODATIONS (meetings and AGM)	1 007,33 €	3 600,00 €	Member subscription	2 150,00 €	
SG TRAVEL (PDF)	3 709,72 €				
INTERPRETING	2 241,25 €	1 000,00 €			
EFBA ADMINISTRATION	**3 890,70 €**	**5 600,00 €**			
SECRETARY GENERAL (VAT INCLUDED) - PDF	3 600,00 €				
COMMUNICATION+ PUBLISHING	- €	1 000,00 €			
WEB SITE	- €	1 000,00 €			
ADMINISTRATIVE AND FINANCIAL COSTS	290,70 €	500,00 €			
CONTINGENCY		3 100,00 €			
TOTAL EXPENSES	**14 089,91 €**	**21 000,00 €**	**TOTAL INCOMES**	**23 150,00 €**	**21 000,00 €**

BALANCE	**6 910,09 €**	**- €**	BALANCE	**2 150,00 €**	**- €**

Budgeted total	21 000,00 €	21 000,00 €	Budgeted total	21 000,00 €	21 000,00 €

Total Balance 2015	**9 060,09 €**

BUDGET 2016 FROM JANUARY 1ST TO DECEMBER 31ST

ITEM	COSTS 2015	BUDGET 2015	**BUDGET 2016**	ITEM	INCOMES 2015	**BUDGET 2016**
EFBA REPRESENTATION	**3 941,69 €**	**10 800,00 €**	**10 100,00 €**	**MEMBERS SUBSCRIPTIONS**	**21 000,00 €**	**21 000,00 €**
DG GROW	1 972,13 €	4 800,00 €	4 800,00 €	BELGIUM (UNGREN)	1 200,00 €	1 200,00 €
CEN TC	605,00 €	4 500,00 €	3 800,00 €	FRANCE (AFCOME)	5 700,00 €	5 700,00 €
IFS	1 364,56 €	1 500,00 €	1 500,00 €	GERMANY (BVDM)	3 900,00 €	3 900,00 €
CEN subscription	605,00 €			IRELAND (IFMA)	1 800,00 €	1 800,00 €
PRESIDENT TRAVEL EXPENSES	1 050,04 €			ITALIA (AIF)	3 200,00 €	3 200,00 €
DG GOW - EFBA REPRESENTANT TRAVEL	922,09 €			NETHERLAND (NVB)	1 300,00 €	1 300,00 €
CEN TC - EFBA REPRESENTANT TRAVEL	- €			UK (AIC)	3 900,00 €	3 900,00 €
I.F.S expanses (registrations + travel)	1 364,56 €			**DOCUMENTATION SOLD**	**- €**	**- €**
EFBA MEETINGS	**6 958,30 €**	**4 600,00 €**	**6 000,00 €**			
EFBA MEETING ACCOMODATIONS (meetings and AGM)	1 007,33 €	3 600,00 €	5 000,00 €			
SG TRAVEL (PDF)	3 709,72 €					
INTERPRETING	2 241,25 €	1 000,00 €	1 000,00 €			
EFBA ADMINISTRATION	**3 890,70 €**	**5 600,00 €**	**4 900,00 €**			
SECRETARY GENERAL (VAT INCLUDED) - PDF	3 600,00 €		2 400,00 €			
COMMUNICATION+ PUBLISHING	- €	1 000,00 €				
WEB SITE	- €	1 000,00 €	2 000,00 €			
ADMINISTRATIVE AND FINANCIAL COSTS	290,70 €	500,00 €	500,00 €			
CONTINGENCY		3 100,00 €				
TOTAL EXPENSES	**14 790,69 €**	**21 000,00 €**	**21 000,00 €**	**TOTAL INCOMES**	**21 000,00 €**	**21 000,00 €**
BALANCE	**6 209,31 €**	**- €**	**- €**	BALANCE	**- €**	**- €**
TOTAL	21 000,00 €	21 000,00 €	21 000,00 €	TOTAL	21 000,00 €	21 000,00 €

MEMBERS SUBSCRIPTIONS CALCULATION

EFBA Member	**Fixed contribution** (Membership)	**Variable contribution** : country arable surface x index		**Total contribution**
		Ha (INSEE)	Contribution / ha	
BELGIUM (UNGREN)	1 000,00 €	1 400	235,20 €	**1 200,00 €**
FRANCE (AFCOME)	1 000,00 €	28 000	4 704,00 €	**5 700,00 €**
GERMANY (BVDM)	1 000,00 €	17 000	2 856,00 €	**3 900,00 €**
IRELAND (IFMA)	1 000,00 €	5 000	840,00 €	**1 800,00 €**
ITALIA (AIF)	1 000,00 €	13 000	2 184,00 €	**3 200,00 €**
NETHERLAND (NVB)	1 000,00 €	1 900	319,20 €	**1 300,00 €**
UK (AIC)	1 000,00 €	17 000	2 856,00 €	**3 900,00 €**

Index calculation : =14000 €/83 300 Ha = 0,168 €/ha

As there was no further business the Chairman closed the meeting.