Impact of Sustainability on the Fertilizer Sector

Background

Fertilizers are essential for human life, but are increasingly criticized by sustainability movements for the negative impacts on the environment of their production, transport, and use. In order to comply with sustainability goals and mandates, key questions must be addressed by the sector and its manufacturers. The business fundamentals are changing quickly, with demand being destroyed and product preferences shifting, causing threats and creating opportunities.

Objective

The purpose of this report is to explore elements of a winning road map for companies in the fertilizer sector to thrive in an increasingly sustainability-driven market:

- Describe sustainability trends affecting the sector
- Identify and define key drivers and the mechanism of impact
- Categorize likelihood of driving change
- Identify market responses to sustainability demands along the value chain
- Assess effects on demand and supply
- Quantify the impact in a model

This detailed study will:

- Discuss the sustainability issues that are increasingly putting pressure on fertilizer producers, distributors, retailers, and users
- Identify key sustainability drivers that are effecting change in the fertilizer business
- Derive impacts of these drivers on demand and on supply by fertilizer segment (e.g., N, P, K, etc.)
- Identify the companies that have the right products and practices to succeed in an environment that features digital farming, regenerative agriculture, etc.
- Discuss the practical technologies that make fertilizer more sustainable and help meet sustainability goals, identifying which are working today or near-commercial (include e.g., raw materials, mining, manufacturing, transport, engineered products, etc.)
- Use the findings to develop a road map to satisfy sustainability pressures with the right products, processes, and practices

This report incorporates expertise Nexant has gained over many years of examining the fertilizer sector as well as the knowledge obtained while engaged in sustainability activities. Thus, the information used to develop this report is derived from in-house sources as well as information provided by technology developers, conversations with sustainability experts, and publicly available resources.

What will be Included in the Report?

- Key sustainability issues driving change and the mechanisms by which they affect the fertilizer sector
- Effects on fertilizer demand and supply
  - Substitution between products, new product adoption
  - Decreased application dosages and frequencies
  - Responses to mandates, environmental activism, etc.
  - Impact of running at lower operating rates, shut downs, loss of efficiencies, etc.
- Potential sustainability solutions – technologies, products, and practices for raw materials, production, product research and development, distribution, use, and post-use
- Evaluation and ranking of the potential sustainability solutions
  - Relevant criteria (e.g., economic, competitiveness, impact on sustainability, commercial status, etc.)
  - Application of criteria to evaluate potential action steps to improve sustainability
  - Identification of potential winners and losers
  - Road map to sustainability for players in the fertilizer sector
- Conclusions and implications

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