



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:

What are the sustainability issues and how are they driving change?

- Describe sustainability trends affecting the sector
- Identify and define key drivers and the mechanism of impact
- Explore how the market is responding to these drivers



What does a roadmap to success look like?

- Explore potential practical solutions to improve sustainability
- Identify current best practices
- Recommend steps for companies in the fertilizer sector to thrive in an increasingly sustainability-driven market

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
- Discuss the practical technologies across the value chain that make fertilizer more sustainable and help meet sustainability goals, identifying which are working today or near-commercial
- Identify the companies that have the right products and practices to succeed in an environment that features intense pressure to improve sustainability
- Use the findings to recommend practical action steps that can be taken in the short, medium, and long term – the technologies, products, and practices that will enable companies in the fertilizer sector to satisfy sustainability demands
- Develop a road map to improve sustainability

This report incorporates expertise NexantECA 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, companies, 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.
- Potential sustainability solutions – technologies, products, and practices for raw materials, production, product research and development, distribution, use, and post-use
- Evaluation of the potential sustainability solutions
 - Practical, realistic, and ready-to-implement processes and practices that fertilizer companies should deploy to improve their sustainability
 - Longer term action steps that will be required to compete in the future of the sector
 - Case studies of companies that are actively implementing sustainable solutions today and developing those for the future
 - Road map to sustainability for players in the fertilizer sector
- Conclusions and recommendations

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