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TRIP REPORT

Seventh Session of FAO Commission on Fertilizers
Rome, Italy

and

The Fertilizer Institute Sixth World Fertilizer Conference
New York City

Fertilizer Technical Assistance

TVA 1-74

by

National Fertilizer Development Center
Tennessee Valley Authority
Muscle Shoals, Alabama

October 13, 1981

UNITED STATES GOVERNMENT

Memorandum

TENNESSEE VALLEY AUTHORITY

TO : Billy J. Bond, Manager of Agricultural and Chemical Development, TVA, and
John L. Malcolm, Bureau of Science and Technology, AID

FROM : Conrad B. Kresge, Administrator, International Fertilizer Section, TVA

DATE : October 13, 1981

SUBJECT: TRIP REPORT--ROME ITALY, SEPTEMBER 6-11, 1981, AND NEW YORK CITY,
SEPTEMBER 20-22, 1981

The purposes of the trips were to represent AID and TVA as advisor on the U.S. delegation to the Seventh Session of the FAO Commission on Fertilizers in Rome and to represent AID at The Fertilizer Institute Sixth World Fertilizer Conference in New York. At the FAO commission meeting, I also served on the Commission Report Drafting Committee.

The FAO Commission on Fertilizers was attended by delegates representing 51 countries, observers from FAO member nations, representatives of the United Nations specialized agencies, intergovernmental organizations, and observers of the fertilizer industry. A provisional list of participants is attached. The session was conducted largely in a nonurgent, uncontentious atmosphere. The only significant divergence of views involved:

1. A proposal to evaluate why there has been such a significant decline in contributions to the FAO International Fertilizer Supply Scheme (IFS).
2. A proposal to revise the paper prepared by the Secretariat on "Major Factors Affecting Fertilizer Supply, Demand, and Prices."
3. A proposal to convene future sessions on a biennial basis.

India assumed a high profile, intervening frequently and dominating discussions by developing nations ("Group of 77"). U.S. views differed from the Indian position on each of the three above-named proposals. U.S. interventions voiced alternatives to the Indian positions. The United Kingdom intervened in agreement with the U.S. position on all significant issues.

Mr. R. B. Ryanga (Kenya) was elected chairman of the commission, Mr. A. E. Guroff (USA) first vice-chairman, and Mr. M. Zjalic (Yugoslavia) second vice-chairman.

Consultative Working Group (CWG) Report

1. Major factors affecting supply, demand, and prices. None of the proposals made in the Secretariat draft study were specifically endorsed by the commission, nor were they systematically discussed.



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No reference to any specific proposal appears in the commission report. Upon instruction, the U.S. delegate read the statement of U.S. opposition to the proposed IMF fertilizer import facility. The commission finally agreed that the Secretariat should revise the draft study "to further improve the information and analysis, taking into account various suggestions of members of the commission." The revised study will be reviewed by the CWG "with the assistance of experts from both developing and developed countries" and "within budgetary resources." The revised study will be presented at the commission's eighth session. The U.S. resisted eventuality of this becoming a CWG document.

2. UNIDO paper on influence of imported technology on the capital costs of plants and the prices of fertilizers. The commission requested further information be obtained on specific effect of imported technology on fertilizer price and presented at the eighth session. U.S. emphasized advantages of imported technology and provided lead-in for World Bank to cite its study showing cost effectiveness of importing technology versus fertilizer. India suggested that lending agencies consider providing more soft credits for infrastructure and that bilateral lenders should encourage international bidding for engineering services and equipment.
3. Progress report on action regarding global phosphate rock resources. At the request of the sixth session, the U.S. delegate presented a progress report on global phosphate rock resources. No discussion took place during the session but interest was expressed by delegates in private.
4. Current status of IFS. U.S. delegate objected to Secretariat suggesting a target for contributions to IFS amounting to 5 percent of bilateral fertilizer assistance, preferring maximum flexibility for donors and recipients.
5. Review of option system. Proposed operational amendments to the option system were adopted with no controversy.

The U.S. made available copies of USDA/ERS appraisal of U.S. Fertilizer Situation and Outlook (attached). This followed the introduction via document FERT/81/3 by the Secretariat on "Review of Current Fertilizer Situation and Outlook." This document contained an analysis of world production, consumption, and trade of the three primary fertilizer nutrients in 1979/80, of spot prices of the main fertilizer materials in international trade up to May 1981, export and domestic prices in exporting countries, and the short- and longer-term outlook for their

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supply and demand, prepared by the FAO/UNIDO/World Bank Working Group on Fertilizer in June 1981.

Concerning review of fertilizer aid to developing countries, the Secretariat paper and most developing country discussions centered on declining contributions to IFS. India suggested that, in its next report, the Secretariat conduct a review of whether IFS is really effective with a view to either modifying or closing down the IFS. U.S. delegate pointed out that such an assessment should be conducted by an external reviewer, not FAO itself. Most developed nations reported their preference for bilateral assistance and many, including the U.S., provided details of their programs. The Secretariat expressed the view that IFS is in trouble solely for lack of resources, not mismanagement. The commission "also noted the contacts which had been established between bilateral fertilizer assistance and stressed that more use may be made of the IFS for this purpose."

The commission expressed approval of FAO's overall programme of work in fertilizer and recommended intensified efforts in increasing efficiency of fertilizer use and use of renewable sources of plant nutrients. At U.S. request, the Secretariat agreed to attempt improvement of budget information by reporting on a less aggregate basis.

The FAO Fertilizer Industry Advisory Committee (FIAC) stated that 1981 contributions of the industry to FAO fertilizer activities will remain at least at the previous level. Preliminary indications suggest that this strong support will continue in 1982. The U.S. delegate lauded the work of FIAC. U.S. industry was well represented this year with three observers (Agrico, PPI, TFI).

Future program of work of the commission. The commission agreed that its next session should primarily deal with current fertilizer situation and outlook and the revised documents on "Major Factors Affecting Fertilizer Supply, Demand, and Prices" and on "Influence of Imported Technology on the Capital Costs of Plants and the Prices of Fertilizers." "Saving Energy in Fertilizer Production" and "Commission Member Experiences in Solving Fertilizer Production, Consumption, and Trade Difficulties and Constraints" are other possible agenda items. The U.S. proposal which originated from TVA/AID for FAO to develop and continually update fertilizer recommendation guides in developing countries was discussed in the corridors with FAO and FIAC officials. Rather than indirectly proposing this to the commission, the decision was made to present the proposal directly to the FIAC technical subcommittee for inclusion in their March 1982 agenda. This was done upon return to Muscle Shoals.

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Date of the Eighth Session. The FAO Assistant Director General proposed that future sessions of the commission meet every two years. The majority of interventions, including that of the U.S., supported the proposal. However, the minority prevailed and the next session should take place in 12 to 16 months. The eighth session will evaluate the commission's work and will consider a proposal for future meetings to be held biennially. The U.S. pressed hard that "the frequency of future meetings should be decided at the current session and not be deferred."

The Consultative Working Group (CWG) of the commission was reconstituted as follows: three officers of the CWG (Kenya, USA, Yugoslavia), India, Germany, Mexico, the Netherlands, Pakistan, Cameroon, Brazil, United Kingdom, Italy, and FIAC.

Following closure of the session, the U.S. delegation felt that it had met all its objectives and obligations and that this seventh session was more fruitful than the sixth session. Various reports are available from the TVA International Fertilizer Section.

During the recesses of the session, besides meeting with various delegates, I met with the following:

John Couston, Working Group on Economics of Fertilizer Use
 Dr. Dudal, Land and Water Development Division
 Hans Braun, Fertilizer and Plant Nutrition Service
 Dennis Halliday, FIAC Liaison to FAO
 Alec Hood, Halliday's replacement effective 1/1/82
 D.F.R. Bommer, Assistant Director General--Agriculture
 Bill Calvery, Agrico
 Bob Wagner, PPI
 Ed Wheeler, TFI
 John Abbot, Working Group on Fertilizer Marketing and Credit
 Bill Sheldrick, World Bank
 Cory Keleti, UNIDO
 Pierre Latteur, FIAC Chairman

Principal discussions with these persons included the FAO/FIAC Latin America Regional Seminar in Peru on Fertilizer Pricing Policies and Subsidies this October, the TVA/AID proposal for FAO development of fertilizer recommendation guides in developing countries, and various activities of the FAO Fertilizer Programme and FIAC.

The Fertilizer Institute Sixth World Fertilizer Conference was attended by over 1200 persons. An attendance list is available. Papers of presentations made will be available at a later date. The subjects and speakers are outlined on the attached agenda. There was a mixture of "bad news" and optimism. The short-range DAP market was depicted

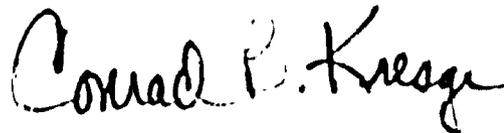
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as dismal. The effect of increasing natural gas prices on projected fertilizer prices and on farmer use of nitrogen was presented. Secretary of Agriculture John Block expressed his support for the fertilizer industry and his reluctant but positive attitude toward government intervention in farm crop prices at this time. Ed Wheeler concluded on a positive note, predicting that the 1981-1982 fertilizer year should almost equal the record domestic sales year 1980-1981. He anticipated that the export fertilizer market will improve and that increased grain buying by the USSR is very probable.

Many contacts were made at the IFFI receptions. Although complaints were prevalent, the tone of the industry in general seemed to me to be one of guarded optimism. In my discussion with John Lancaster, British Sulphur Corporation, we compared notes on the termination of IVA Fertilizer Abstracts and the new British Sulphur Corporation monthly publication World Fertilizer News Summary.



CBK:DE
Attachments



FOOD AND AGRICULTURE ORGANIZATION
OF THE UNITED NATIONS

ORGANISATION DES NATIONS UNIES POUR
L'ALIMENTATION ET L'AGRICULTURE

ORGANIZACION DE LAS NACIONES UNIDAS
PARA LA AGRICULTURA Y LA ALIMENTACION

FERT/81/Inf. 3

September 1981

LIST OF DELEGATES AND OBSERVERS

Chairman: Mr. R. B. Kyanga (Kenya)
First Vice-Chairman: Mr. A. E. Garoff (United States of America)
Second Vice-Chairman: Mr. M. ZJALIC (Yugoslavia)

MEMBERS OF THE COMMISSION

Australia

Delegate: SAINGSURY, J. G.
Counsellor (Agriculture) and
Acting Permanent Representative of Australia
to FAO
Australian Embassy, Rome

Belgium

Delegate: WANNINCK, Jean-Paul
Représentant Permanent Adjoint de la Belgique
auprès de la FAO
Représentation permanente de la Belgique
auprès de la FAO, Rome

Brazil

Delegate: DE FREITAS ANDREINIUS F. H.
Embassy of the Federative Republic of Brazil
Rome
Alternate: DE SAMPAIO FERREZ, Eliana
Brazilian Embassy, Rome

Cameroon

Delegate: NGONGI NAMUSA, A.G.
First Secretary
Cameroon Embassy, Rome

Canada

Delegate: HIGHAM, I.R.
Permanent Representative of Canada to FAO
Canadian Embassy, Rome

Chile

Delegate: CALDERASO, Sergio
Representante Permanente de Chile ante la FAO
Representación Permanente de Chile, Rome

Alternate: BALDUZZI, Magdalena
Representacion Permanente de Chile, Rome

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Representante Permanente alterno, 1º Secretario
Representacion Permanente de Colombia ante
la FAO, Rome

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Representante permanente alt erno
Representacion Permanente de Colombia ante
la FAO, Rome

Cuba

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Quimimport
Representacion Permanente de Cuba ante la
FAO, Rome

Denmark

Delegate: GLISTRUP, John
Permanent Representative of Denmark to FAO
Royal Danish Embassy, Rome

Ecuador

Delegate: SUAREZ, Alejandro
Primer Secretario
Embajada de la Republica del Ecuador

Egypt

Delegate: SERRY, Ali Hassan
Deputy Director, AEC,
Ministry of Agriculture
Egyptian Embassy, Rome

Alternate: DAROUFI, Ali
Under Secretary
Ministry of Agriculture
Egyptian Embassy, Rome

Alternate: HADDI, Yusef A.
Agricultural Counsellor
Alternate Permanent Representative of
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Egyptian Embassy, Rome

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Alternate Permanent Representative of El
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El Salvador Embassy, Rome

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Embassy of the Republic of Finland, Rome

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Head of AGRI Service
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Delegate: BUFFET, François
Ministry of Industry, Paris

Germany, Fed. Rep. of

Delegate: BOPP, Helmut
Head of Section
Federal Ministry of Economics, Bonn

Alternate: ELUNE, Günter
Representative Federal Republic of Germany
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Permanent Representative to FAO
Embassy of the Republic of Ghana, Rome

India

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Joint Secretary
Fertilizers and Manures
Government of India, New Delhi

Alternate: RAMASWAMY, G.
Director IFFCO
Government of India, New Delhi

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Counsellor (Agriculture)
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Delegate of the Islamic Republic of Iran
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Alternate: MOHAMMAD ANAVI
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Permanent Representative
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Permanent Representation of Iraq to FAO, Rome

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Delegate: NOGBOU N DAH
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Ministère Agriculture
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Mexico

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Delegate: UTHNE, Sverre
Senior Agriculture Officer
Oslo, Norway

Observer: JAN RADE
Manager
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Agricultural Counsellor
Alternate Permanent Representative to FAO
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ante FAO, Rome

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Permanent Representative to FAO, Rome

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Directeur de l'Exploitation de la Société
Nationale d'Approvisionnement de McIde Rural
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Sierra Leone

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United States Fertilizer Situation and Outlook

Preliminary estimates of fertilizer use in the United States during the year ended June 30, 1981 indicates that overall consumption was up by perhaps 4 percent, nearing 22 million metric tons of primary nutrients. Nitrogen use gained the most, with most estimates suggesting about a 6 percent increase to just under 11 million metric tons (N). Phosphate consumption probably recovered some from depressed 1979/80 levels gaining 2 to 3 percent to about 5 million tons (P_2O_5). Potash use appears to have changed little from the previous year, increasing slightly to perhaps 5.7 million tons (K_2O).

Increases in farm fertilizer prices from Spring 1980 to Spring 1981 were much smaller than the previous years' overall increase of 28 percent. In May 1981, U.S. farmers paid, on average, only 7.3 percent more for their fertilizers than a year earlier. Muriate of potash was up the most, rising 14.8 percent followed by nitrogen solutions up 12.9 percent, urea up 7.5 percent and anhydrous ammonia up 5.6 percent. Diammonium phosphate prices declined 5 percent and concentrated superphosphate fell nearly 1 percent.

Domestic production of all finished fertilizer products increased 5 percent in 1980/81 according to a survey conducted by the Fertilizer Institute. Nitrogen products were up 6 percent, phosphates up 6 percent, and potash down 4 percent. Inventories held by U.S. manufacturers on June 30, 1981 were up about 1 percent overall. Nitrogen inventories were down by 9 percent, while phosphates and potash were up 10 and 19 percent, respectively.

Reduced operating rates in U.S. phosphate facilities are anticipated in 1981/82 as plants are temporarily closed for extended maintenance while large inventories are worked down. Modest increases are anticipated in U.S. nitrogen output during the current fertilizer year because plants which reopened during part of 1980/81 should operate all year during 1981/82. Little change is expected in U.S. potash production.

Fertilizer consumption in the United States during 1981/82 is expected to change little from the previous year, with modest overall gains lower than those achieved in 1980/81 likely if current market conditions prevail. Near record grain harvests are expected during the 1981 crop season, export growth appears to have slowed and only modest growth in livestock feeding is foreseen this season. These factors currently suggest that crop price increases will not be sufficient to encourage either significant acreage expansion or increased fertilizer application rates during the current fertilizer year. Interest rates on farm production loans are expected to remain high during the coming planting season, so there seems to be little encouragement to significantly increase input use. Under these conditions fertilizer price increases should again be moderate.

If adverse crop production conditions develop in the Southern Hemisphere or if other unanticipated world events cause world grain prices to increase significantly, then U.S. fertilizer use could increase more than currently expected.



SIXTH ANNUAL
WORLD FERTILIZER CONFERENCE
September 20-22, 1981
Waldorf-Astoria Hotel
New York, NY



Sunday, September 20
6:30 – 7:30 p.m.

Reception

Monday, September 21
9:30 a.m. – Noon

General Session

Presiding

Gino P. Giusti, Chairman, TFI Board
President & Chief Operating Officer
Texasgulf Inc., Stamford, Connecticut, USA

"Changing World Patterns in Phosphates"

W. J. Turbeville, Jr., Chairman of the Board
Phosphate Rock Export Association, Tampa, Florida, USA

"U.S. Agricultural Policy"

John R. Block, U.S. Secretary of Agriculture
Washington, D.C., USA

"Italian Fertilizer Overview"

Armando Mortara, General Manager, Agriculture Division
ANIC, Milan, Italy

6:30 – 7:30 p.m.

Reception

Tuesday, September 22
9:30 a.m. – Noon

General Session

Presiding

Edwin M. Wheeler, President
The Fertilizer Institute
Washington, D.C., USA

"Will Farmers Be Able to Afford Fertilizers, 1985 And Beyond"

John R. Douglas, Jr., Assistant to the Manager
National Fertilizer Development Center (TVA)
Muscle Shoals, Alabama, USA

"Potash 1990 – Feast or Famine"

Dean Gidney, President, Potash Company of America
New York, New York, USA

"Canadian Nitrogen Production Growth – Its Implications"

J. R. Haggerty, Marketing Manager, Esso Canada
Toronto, Ontario, Canada

"Closing Remarks"

Edwin M. Wheeler