The new meeting place for the global phosphates industry

INDUSTRIAL MINERALS
EVENTS

Global Phosphates

28 – 29 November 2016 | Movenpick Hotel Amsterdam

indmin.com/events/global-phosphates

Global Phosphates

At Industrial Minerals, we know what you need.

That's why Global Phosphates is not your ordinary conference.

It's a unique combination of the most relevant information you need to succeed in the global phosphates market, and the senior audience you want to network with, all under one roof.

So if you're looking for a perfect knowledge sharing and networking platform, **Global Phosphates** is the place to be.

YOU'LL KNOW EVERYTHING ABOUT THE MARKET

What's happening in the market?

Global nutrient supply and demand dynamics are weighing on profits for phosphate producers with the market in a state of oversupply.

However, despite bearish appearances, demand for nutrients and fertilisers is expected to increase in the coming season.

Economic phosphate rock reserves are depleting, which means more room for new high-grade phosphate exploration projects, particularly in Africa.

How is it affecting the industry?

With phosphate fertiliser prices being down to the lowest levels in years, margins are declining across the industry.

This downward pressure is set to lead to production capacity cuts, particularly in China, and allow the price to find a floor.

However, with new capacity to come online in Europe and MENA in the near future, downward forces on the price may be reapplied.

What does it mean for you?

To succeed in current market conditions, you have to deal with the upcoming challenges in the most efficient way.

You need the most up-to-date information on the industry's trends and forecasts to find out where to invest your funds in, and where to cut costs.

At **Global Phosphates** you'll learn everything you need to adjust your strategy, minimise possible threats and make use of the upcoming opportunities.

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YOU'LL MEET EVERYONE YOU NEED

Networking is an important part of any conference.

Bearing that in mind, we've taken networking at **Global Phosphates** to the next level.

At the conference, you'll have plenty of time to meet and greet your peers, make deals with your clients, and expand your business even further.

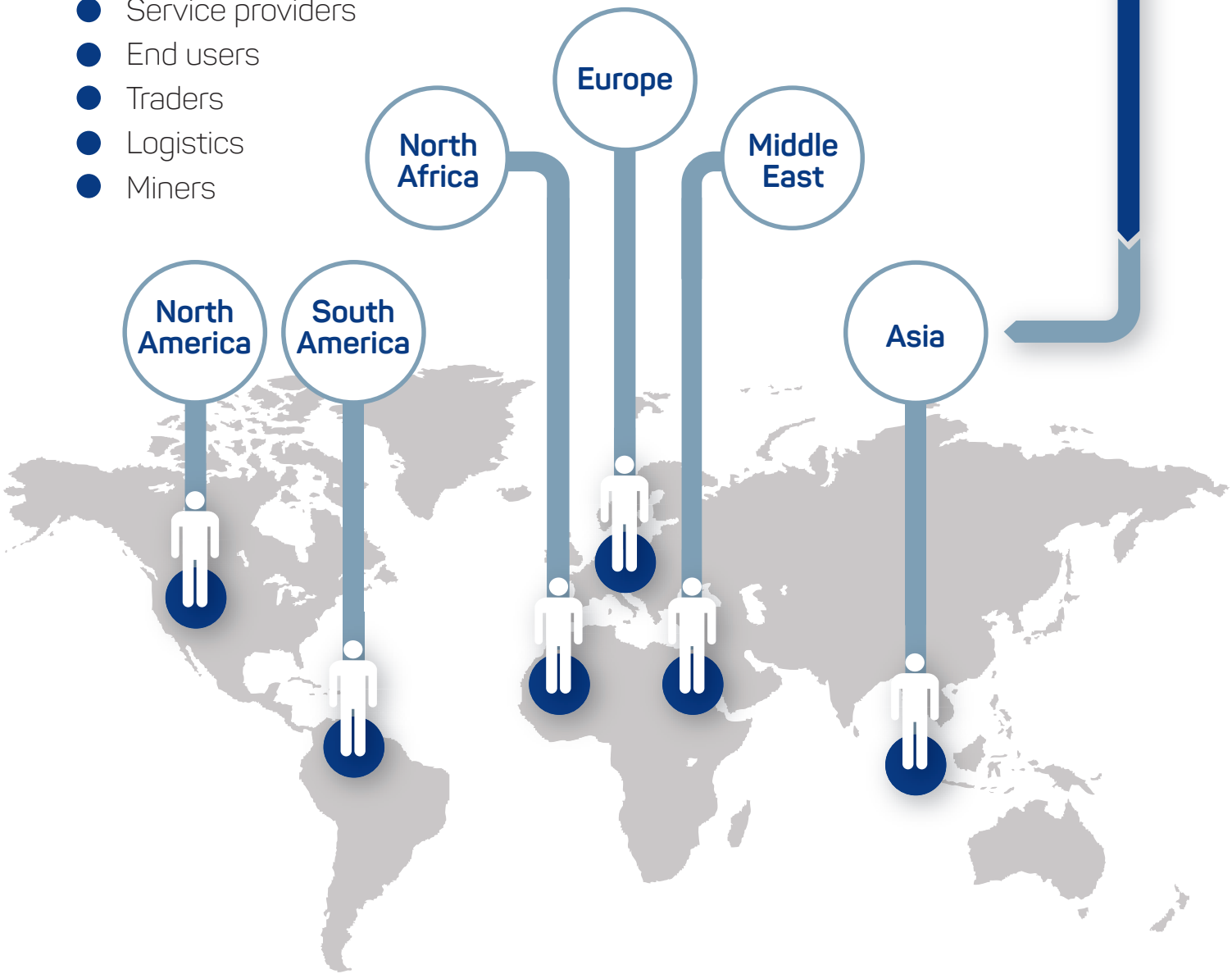
Contact all the delegates before the event via our exclusive delegate messaging system, keep in touch with them after the conference, and make the most out of the event's networking opportunities.

Can you afford to miss it?

Expected delegates by company type

- Producers
- Manufacturers
- Fertilisers
- Service providers
- End users
- Traders
- Logistics
- Miners

from



Day One: 28 November 2016

12:00 Registration and networking lunch

13:20 **Chairperson's opening remarks**

Session I: Keynote presentations and market trend analysis

13:30 **KEYNOTE PRESENTATION: Global supply and demand dynamics analysed by a leading phosphate producer**

- Analysis of the factors keeping phosphates prices down – when will they reach the bottom?
- How are global inventories looking? How long will these levels continue?
- What does the provision of extra warehousing space for fertiliser producers in Europe say about production levels in a low-price, low-demand climate?
- New tonnages entering the market – When? Where? How much?

Irina Evstigneeva
Director Corporate Finance & IR
Phosagro, Russia

14:15 **Analysing end-user market drivers and their implications**

- Outlook for crop markets in 2017 and impact on farmer wallets around the world
- Key factors for long-term development of phosphate fertiliser markets, agronomy, economics and policies
- What should phosphate fertiliser players do to capture the value?

Harry Smit
Senior Analyst - Farm Inputs
Rabobank, Netherlands

14:45 **Industrial phosphate and phosphoric chemicals outlook**

- Global consumption – major phosphates and end use applications
- Focus on sodium phosphates
- Global consumption trends, what are the growth areas for phosphorus chlorides, oxides and sulfides

Samantha Wietlisbach
Principal Analyst – Chemica
IHS Markit, Switzerland

15:15 Networking break and afternoon refreshments

Session II: Disruptive technologies and phosphate recycling - can the direction of the phosphate industry be altered?

16:00 **How may valorisation of waste-materials change industry dynamics?**

- EcoPhos technology and the treatment of sewage sludge ashes to create phosphate products
- Providing an alternative to further mineral exploitation to keep up with demand
- Further treatment of waste-materials from phosphate fertiliser production

Yannick Van Coppenolle
Business Development & Marketing Manager
Ecophos Group, Belgium

16:30 **Technical advances in phosphate recycling**

- Analysing the available sources of secondary phosphates
- What are the materials found in recycled materials that cause challenges for phosphate recovery?
- Does this impose limitations on the extent to which phosphates can be recycled?
- What technological advances have been made in this sector to make secondary phosphates more feasible?

Willem Schipper
Director
Willem Schipper Consulting, Netherlands

17:00 **End of day one and networking drinks reception**

Day Two: 29 November 2016

08:00 **Registration and morning refreshments**

09:15 **Chairperson's opening remarks**

Session III: Regional Focus – analysing the key phosphate markets

09:30 **How is China adapting to the 'new normal' of dwindling high-grade phosphate supplies?**

- How close are high-grade phosphate rock supplies to being exhausted with current consumption rates in China?
- Analysing the effects that higher beneficiation costs for low-grade material would have on miners, and in turn downstream players
- What effect will this have on phosphate trade flows? Will we see exports being banned? Will this fundamentally undermine China's competitiveness in the global market?
- If high-grade reserves are depleted before lower grades can be economically exploited, will the market be set to benefit from a new centre of demand?

Leo Li
Project Director
National Chemical Information Centre, China

10:00 **Challenges and opportunities of the Brazilian fertiliser market**

- How is the industry reacting the financial troubles in the country and the difficult start to the year?
- How is the changing level of farmer contributions to fertiliser sales, due to less available finance, impacting on the wider industry?
- Analysing the currency market's relation to buying decisions in Brazil

Francisco Cleber S. Vieira
Project Manager
Agro Consult, Brazil

Session IV: Optimisation of mining processes

10:30 **Process optimisation – how can production quality be maximised at minimal expense in beneficiation?**

- Mineral processing rules to improve grade and recovery
- Quantifying the benefits of higher grades and recovery rates in phosphate mining and beneficiation
- Long-term environmental benefits resulting from process optimisation

Todd Parker
Global Marketing Manager – Mining
ArrMazz, USA

11:00 **Networking refreshment break**

Session V: Phosphate pricing and financials

11:45 **Is the current trend of low phosphate prices sustainable?**

- How have phosphate producer gross margins been affected in the current supply-driven market?
- How are producers adapting their approaches in this supply-driven market?
- Capacity developments and market implications

Ibi Idoniboye
Phosphate and Lead NPK Analyst
Integer Research, UK

12:15 **Phosphate pricing consequences of current market trends**

- Predicting the long-term effect of low prices on non-integrated producers
- Production capacity cutting projections and cost-curve analysis
- To what extent are end-users alone responsible for the turnaround in fortunes for producers?

Yoke Wong
Head of Market Reporting MIM
Industrial Minerals, UK

12:45 **Networking lunch**

14:15 **The role of the paper market in the phosphates industry**

- Tracking the growth and development of the phosphate paper market
- How does the paper interact with the physical market and how is it being utilised by producers?
- In the face of a low price outlook, can further hedging of tonnages be expected?

Per Jensen
Fertilisers Head
DirectHedge, Denmark

Session VI: Regulatory outlook and the effect on the global phosphates market

14:45 **One year in, how is Europe's Circular Economy Package affecting the fertiliser industry in Europe?**

- How are changes to previous Europe's fertiliser regulation damaging phosphate and other mineral fertilisers' competitive advantage?
- How are different sectors of the supply chain being affected by maximum limits for heavy metals (e.g. cadmium) in fertilisers?
- As demand for phosphate fertiliser continues to rise, will resource efficiency in phosphate products be essential to the European industry?

Jacob Bagge Hansen
Director General
Fertilizers Europe, Belgium

15:30 **Networking break and afternoon refreshments**

Session: VI: Essential raw materials

16:00 **Sulphur industry dynamics and their consequences**

- Outlook for sulphur supply and new capacity expansions
- Pricing implications in the mid to long term
- Analysis of regional manufacturing dynamics
- What does this mean for the producers of phosphate products?

Freda Gordon
Director
Acuity Commodities, UK

Session VII: Logistical considerations

16:30 **Logistics and warehousing considerations**

- Dry-bulk shipping price outlook and the implications for fertiliser markets
- Looking at production rates of European fertiliser manufacturers and the availability of warehousing space

Tim Borteel
Commercial Manager
Euroports, Belgium

17:00 **End of day two and conference close**

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Easy ways to register

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Prices & special rates

	Early bird rate (until 7 Oct 2016)	Full rate (after 7 Oct 2016)
1st delegate	€ 1,499 + VAT	€ 1,799 + VAT
2nd delegate	€ 1,099 + VAT	€ 1,399 + VAT
3rd delegate	€ 799 + VAT	€ 1,099 + VAT

Please note that the invoice deadline is 28 October 2016.