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Robert Meakin
25 October 2018
Athens, Greece

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AGENDA

1. Current fertilizer strategies
2. Opportunities for improved practice with POLY4
3. Outcomes for improved quality

DEMAND AND PROVISIONS

Nitrogen

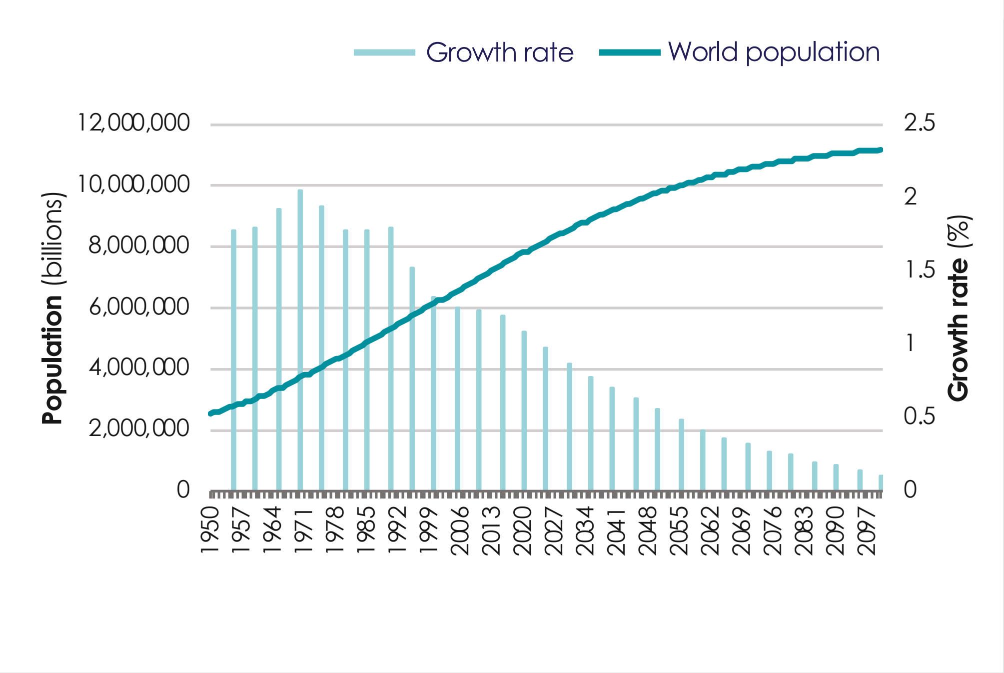
- Ubiquitous ~ 78% v/v atmosphere
- Production may become strategic
- EU: biggest natural gas user, costs forecast to double

Phosphorus

- Limited countries own mineral resources
- Finite and strategic resource
- EU: dependent on external sources with forecasted 25% availability decrease, quality issues

Potassium

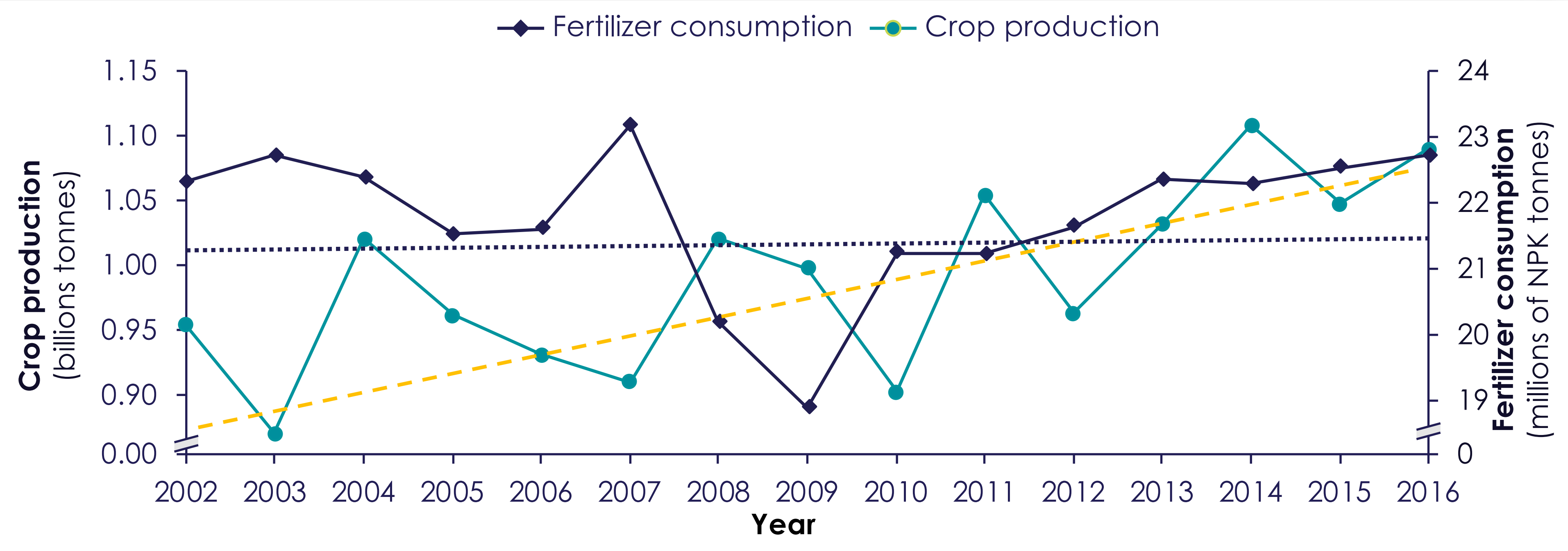
- Two-thirds of the world production is in three countries (Canada, Russia and Belarus)
- Eight companies control 80% of the production
- EU: partially self-sufficient with supplies from UK, Germany, France and Spain



KEY TAKEAWAY: SUPPLY RISKS, DEPLETION OF NON-RENEWABLE RESOURCES

Notes: Estimate of actual world population and growth rate until 2015 with medium variant scenario used for forecasts to 2100.
Sources : Malingreau et al (2012). NPK: Will there be enough plant nutrients to feed a world of 9 billion in 2050? European Commission

CURRENT TREND IN FERTILIZER USE



EU exhibits improvement in fertilizer use efficiency but is also affected by:

- Changes in dietary habits, biofuels production and Genetic improvements elevate output
- NPK use is static
- Are we depleting the soil resource?

Source: FAO (2017)

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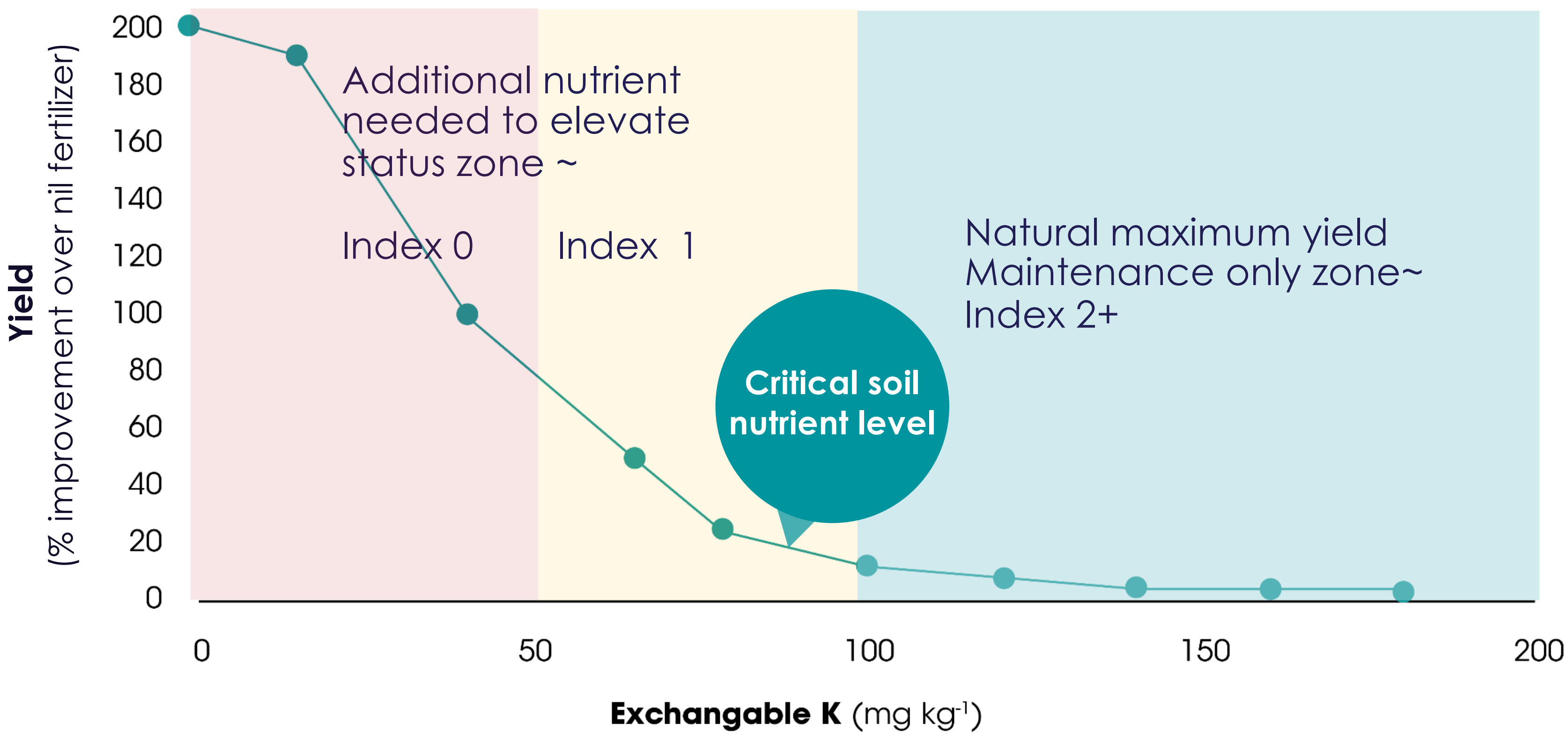
CURRENT CONCERNS TO ACCOUNT FOR

- Crop requirements for food production
- Geostrategic elements in a more uncertain global political situation
- Application efficiencies
- Soil rehabilitation
- Environmental impacts

KEY TAKEAWAY: CONSIDER A HOLISTIC APPROACH FOR LONG-TERM FOOD SECURITY

FERTILIZER RATE CHANGES WITH SOIL SUPPLY CAPACITY



KEY TAKEAWAY: WHEN NATURAL YIELD PEAKS WE ONLY REQUIRE MAINTENANCE BECAUSE MORE DOESN'T WORK

	P or K Index			
	0	1	2	3 and higher
	kg/ha			
Straw ploughed in/incorporated				
Winter wheat, winter barley (8 t/ha)				
Phosphate (P_2O_5)	120	90	60	0
Potash (K_2O)	105	75	45 (2-) 20 (2+)	0
Spring wheat, spring barley, rye, triticale (6 t/ha)				
Phosphate (P_2O_5)	105	75	45	0
Potash (K_2O)	95	65	35 (2-) 0 (2+)	0
Winter and spring oats (6 t/ha)				
Phosphate (P_2O_5)	105	75	45	0
Potash (K_2O)	95	65	35 (2-) 0 (2+)	0
Straw removed				
Winter wheat, winter barley (8 t/ha)				
Phosphate (P_2O_5)	125	95	65	0
Potash (K_2O)	145	115	85 (2-) 55 (2+)	0
Spring wheat, spring barley, rye, triticale (6 t/ha)				
Phosphate (P_2O_5)	110	80	50	0
Potash (K_2O)	130	100	70 (2-) 40 (2+)	0
Winter and spring oats (6 t/ha)				
Phosphate (P_2O_5)	115	85	55	0
Potash (K_2O)	165	135	105 (2-) 75 (2+)	0

Source: Nutrient Management Guide, AHDB (2017)

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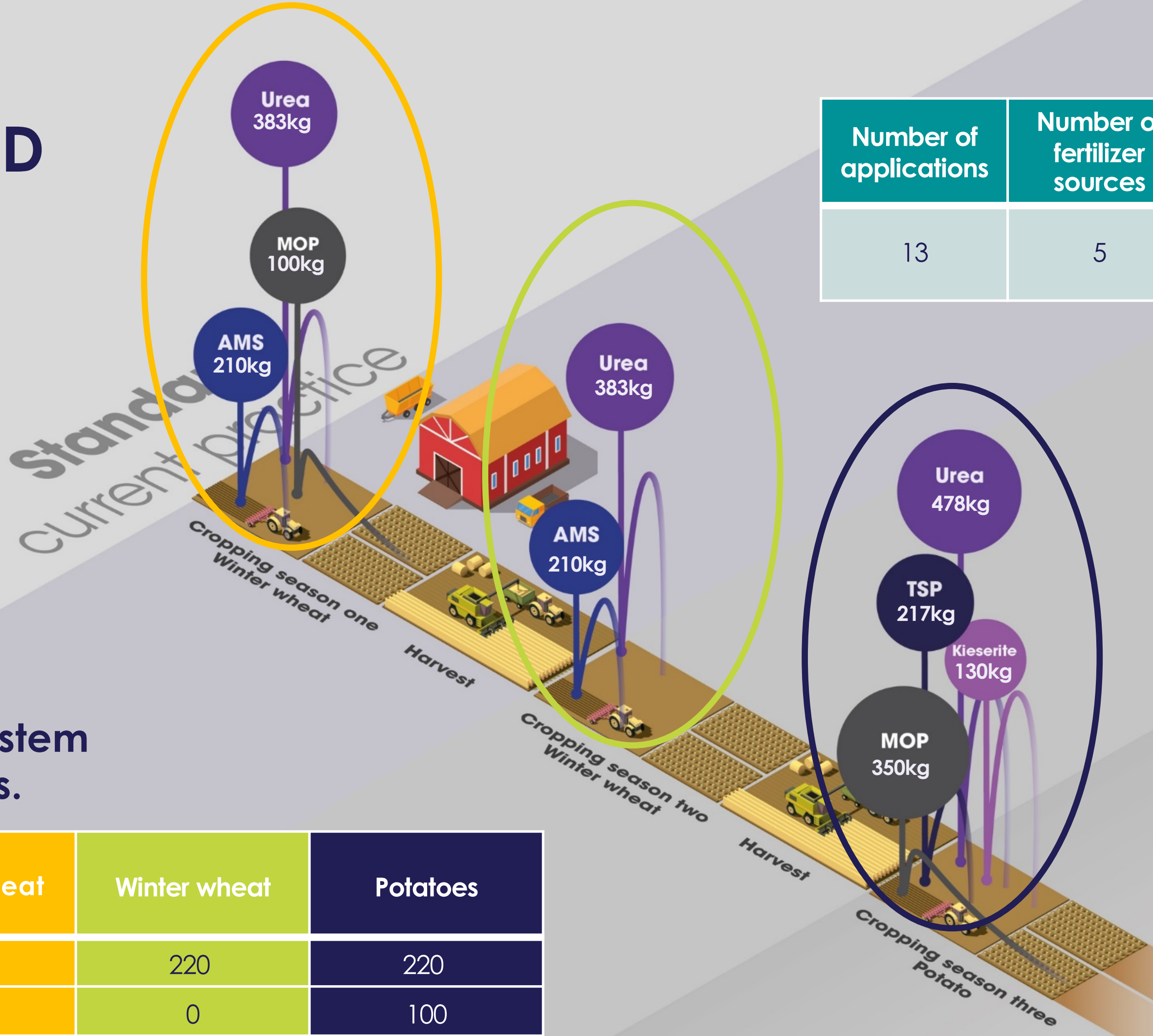
EFFICIENT AND FLEXIBLE

Number of applications	Number of fertilizer sources	Cost (US$/ha)	Output (US$/ha)
13	5	208	4,608



Case study: rotation cropping system across three seasons.

Nutrients applied (kg ha^{-1})	Winter wheat	Winter wheat	Potatoes
N	220	220	220
P_2O_5	0	0	100
K_2O	60	0	210
CaO	0	0	43
MgO	0	0	33
S	50	50	26
Cl^-	48	0	168

Performance consideration:

Yield

Notes: 1) A review of policy changes over a wheat – wheat – potatoes rotation. Fertilizer plan considers WW needs 30 K_2O ha^{-1}, potatoes 210 K_2O ha^{-1}, POLY4 supplies all of the crop's K, Mg and S need. Application, timing and crop responses as per trial results: 17000-ASA-17010-14, 18000-SGS-18010-14, 49000-PUL-49010-16, 22000-MAC-22010-15. Crop yield response v standard based on +3% average yield improvement on winter wheat and +5% on potato.

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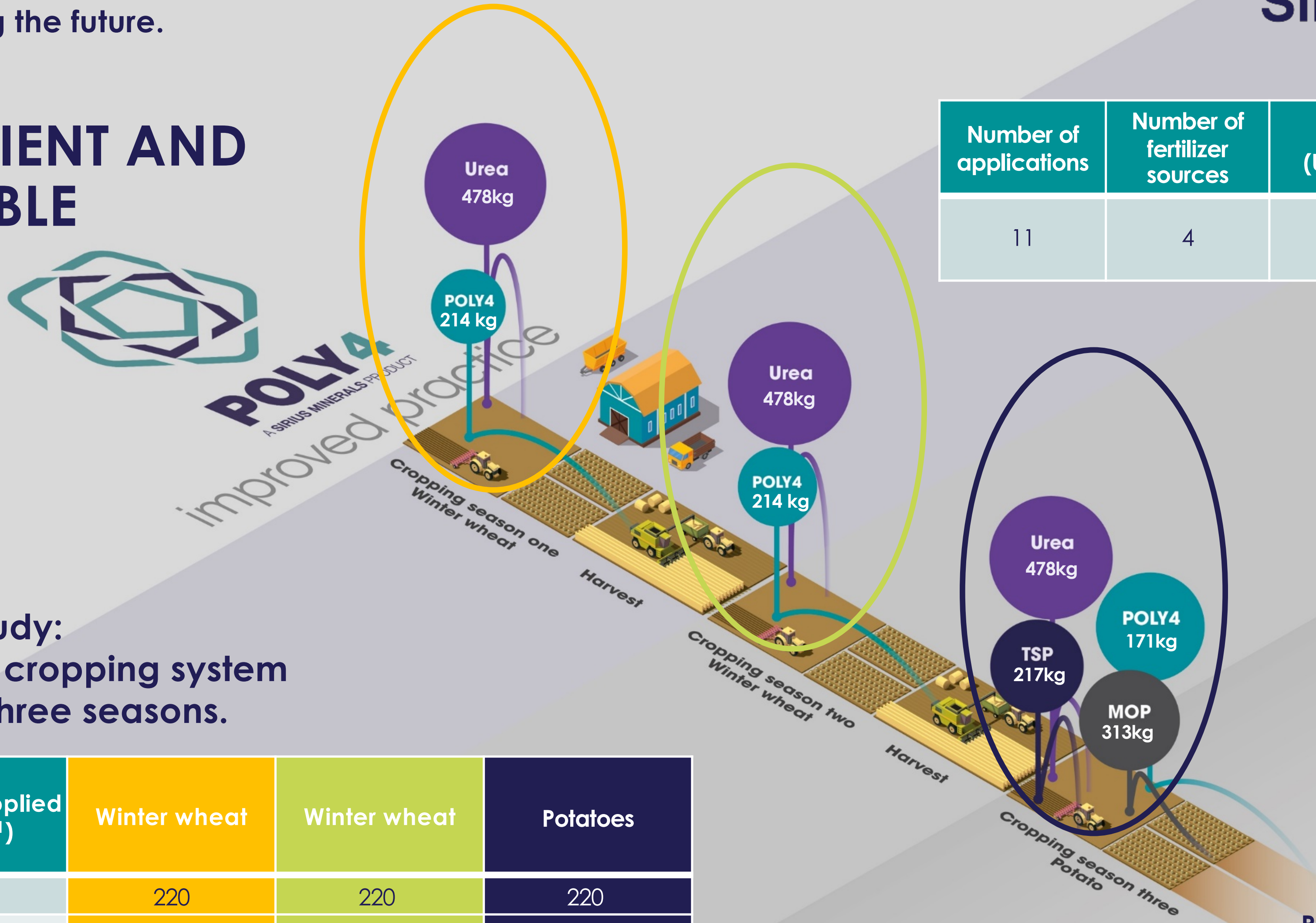
EFFICIENT AND FLEXIBLE



Number of applications	Number of fertilizer sources	Cost (US$/ha)	Output (US$/ha)
11	4	210	4811

Case study: rotation cropping system across three seasons.

Nutrients applied (kg ha^{-1})	Winter wheat	Winter wheat	Potatoes
N	220	220	220
P_2O_5	0	0	100
K_2O	30	30	210
CaO	36	36	72
MgO	13	13	10
S	41	41	32
Cl^-	6	6	155

Performance consideration:

Yield

Notes: 1) A review of policy changes over a wheat – wheat – potatoes rotation. Fertilizer plan considers WW needs 30 K_2O ha^{-1}, potatoes 210 K_2O ha^{-1}, POLY4 supplies all of the crop's K, Mg and S need. Application, timing and crop responses as per trial results: 17000-ASA-17010-14, 18000-SGS-18010-14, 49000-PUL-49010-16, 22000-MAC-22010-15. Crop yield response v standard based on +3% average yield improvement on winter wheat and +5% on potato.

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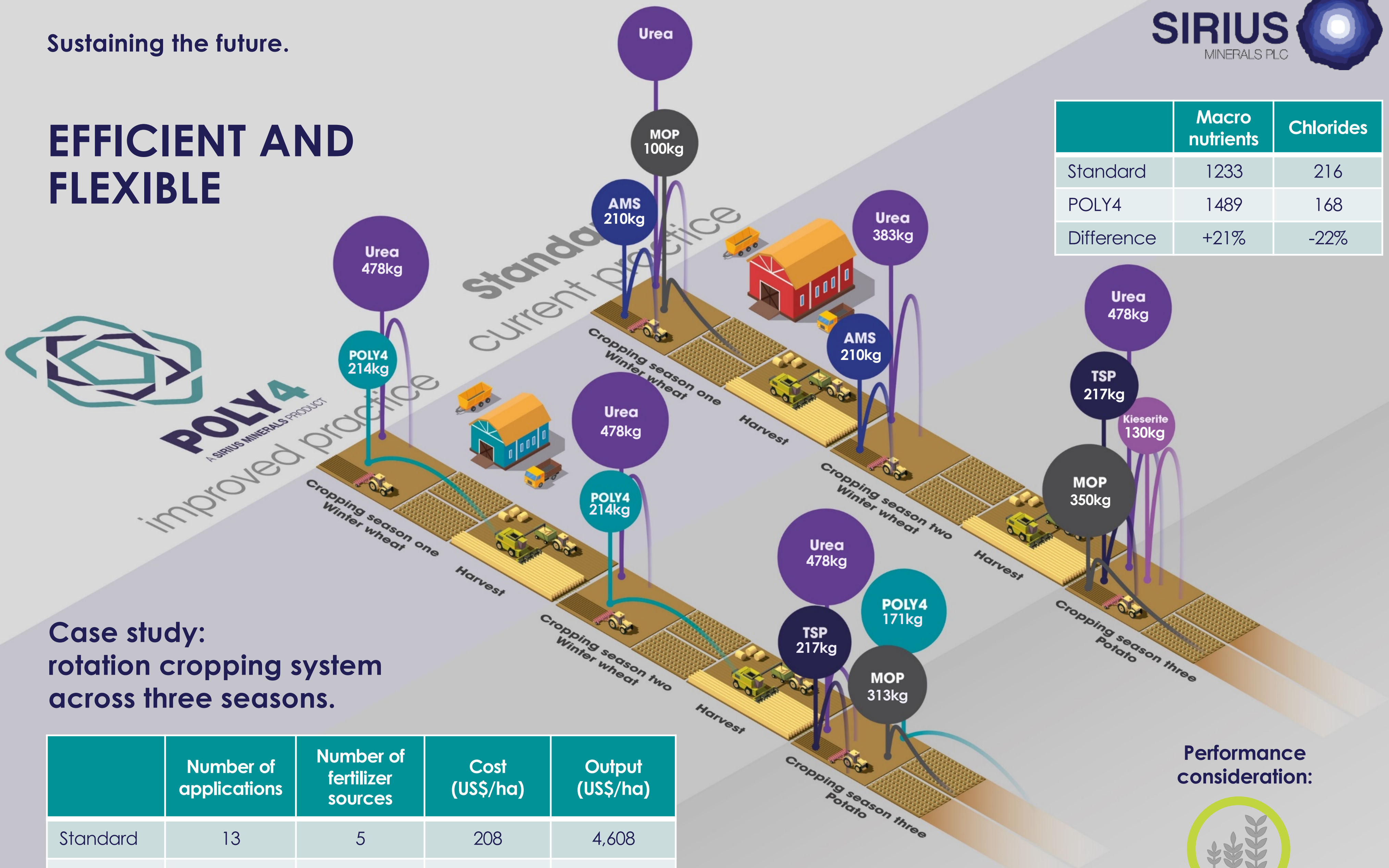

	Macro nutrients	Chlorides
Standard	1233	216
POLY4	1489	168
Difference	+21%	-22%

Case study: rotation cropping system across three seasons.

	Number of applications	Number of fertilizer sources	Cost (US$/ha)	Output (US$/ha)
Standard	13	5	208	4,608
POLY4	11	4	210	4,811
Difference	-2	-20%	+2	+203

Performance consideration:

Yield

Notes: 1) A review of policy changes over a wheat – wheat – potatoes rotation. Fertilizer plan considers WW needs 30 K_2O ha^{-1}, potatoes 210 K_2O ha^{-1}, POLY4 supplies all of the crop's K, Mg and S need. Application, timing and crop responses as per trial results: 17000-ASA-17010-14, 18000-SGS-18010-14, 49000-PUL-49010-16, 22000-MAC-22010-15. Crop yield response v standard based on +3% average yield improvement on winter wheat and +5% on potato.

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EFFECTIVE BUT INEFFICIENT INDUSTRY APPROACH

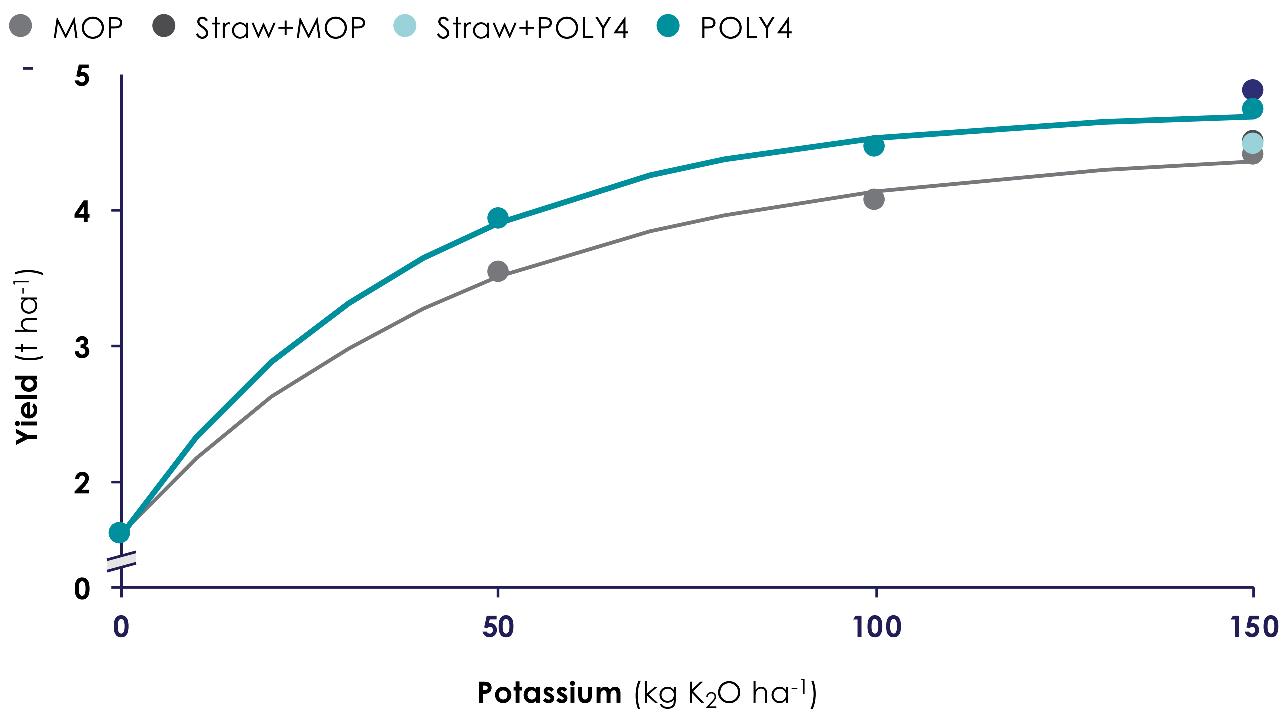
What we do	What we are missing
Assess soil nutrient status	Supply rate from the soil Source efficiency of nutrient capture
Account for crop residue values	Accounting for residual soil nutrient status from different sources
Consider application timing	Individual product application timing
Consider soil CEC	Antagonism/disruption by application of different nutrient source
Talk about "sustainability"	Replacing nutrient offtake for all nutrients

THE VALUE OF BIOMASS NUTRIENT

Key findings

- K rate response
- POLY multi-nutrient premium
- At 150 K_2O ha^{-1} MOP, POLY4 and partial substituted straw K have similar value
- Straw alone exhibits the familiar depression
  - N demand
  - Nutrient delivery rate

China wheat yield response from potash sources



KEY TAKEAWAY: ALL NUTRIENT SOURCES SUPPLEMENT SOIL SUPPLY

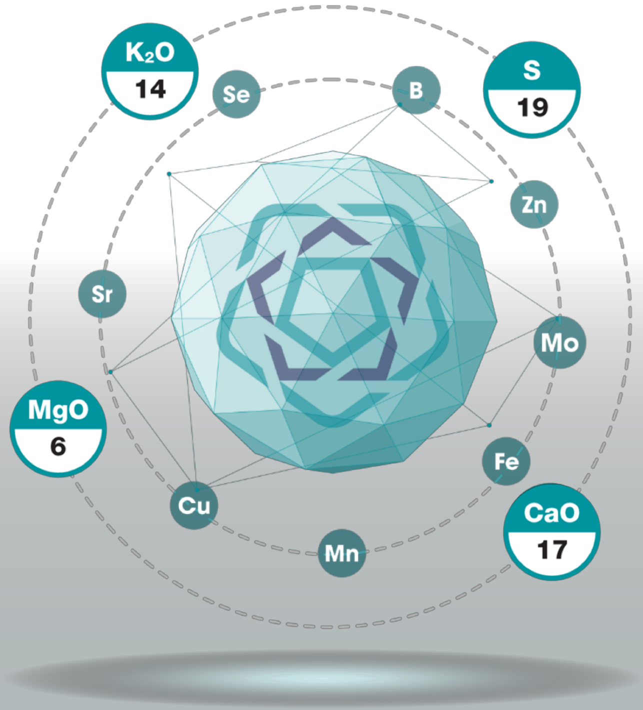
Notes: 1) All treatments received 180 kg N ha^{-1} and 120 kg P_2O_5 ha^{-1} from urea and DAP.
Source: Institute of Soil Science, Chinese Academy of Sciences (2014) 20000-CAS-20011-14

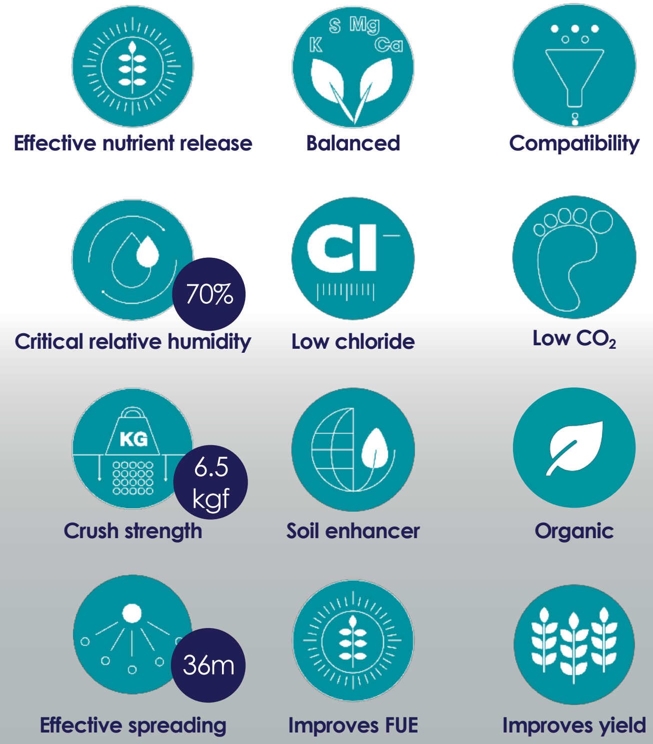
INTRODUCING POLY4

A single source of bulk nutrients as foundation for effective, efficient, flexible and sustainable fertilization.

Characteristics

- Improves yield and quality
- Straight or as part of a fertilizer blend
- Efficient nutrient release profile
- pH neutral

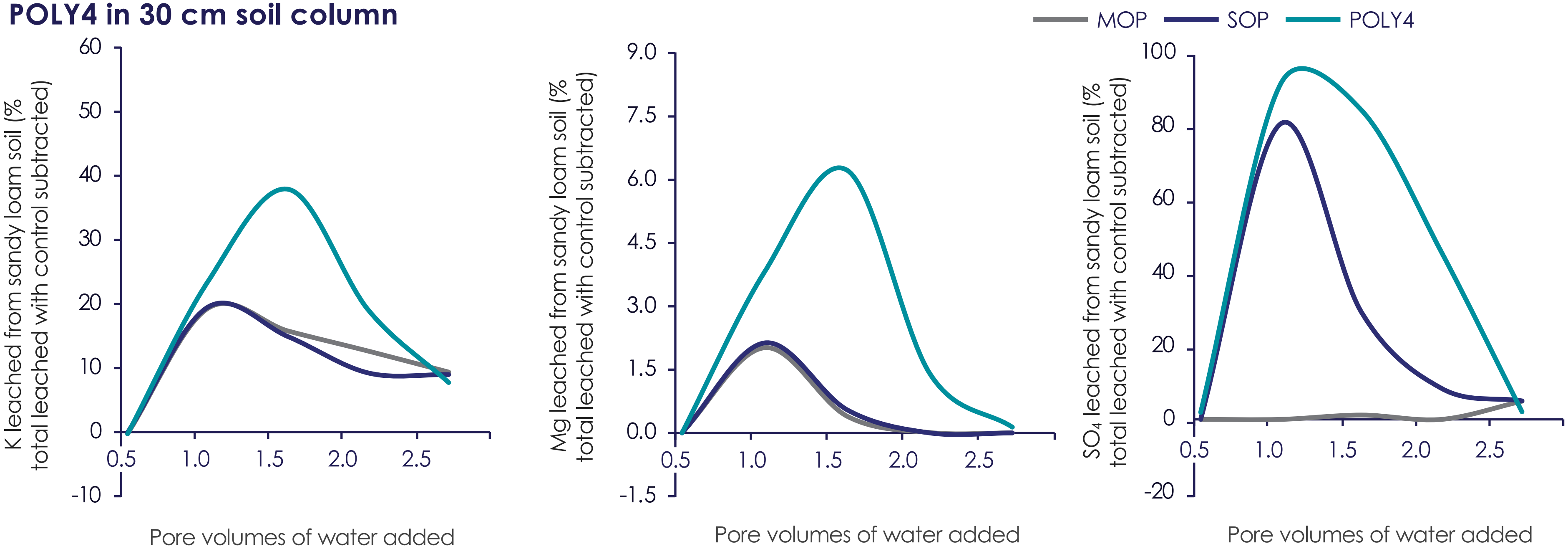




Notes: 1) Based on 90% polyhalite grade. Macro nutrients based on w/w % and micro nutrients based on mg/kg; micro nutrients' content: B 169, Zn 1.9, Mn 3.1, Mo 0.3, Se>0.5, FE>0.5, Cu 1.1, Sr 1414. 2) POLY4 is the trademark name for polyhalite products from the Sirius Minerals polyhalite project in North Yorkshire, *48% SO_3. B – boron, Cu – copper, Se – selenium, Zn – zinc, Fe – iron, Sr – strontium, Mo – molybdenum, Mn – manganese.

NUTRIENT DELIVERY TIMEFRAME WITH POLY4

POLY4 in 30 cm soil column



KEY TAKEAWAY: **POLY4 SUPPLIES NUTRIENTS AT CROP APPROPRIATE RATES**

Notes: 1) Amount of water is monthly equivalent to two years rainfall based on a five year average rainfall of 1385 mm yr^{-1} in Florida; 2) Fertilizer application rate of 300 kg K_2O ha^{-1}. Soil analysis for pH 8.06, 44 mg K kg^{-1}, 1360 mg Ca kg^{-1}, 551 mg Mg kg^{-1}, 15,642 mg S kg^{-1}, OM 0.4%, soil texture: 88.4% sand, 0.6% silt, 10.6% clay.
Source: University of Florida (2015)1000-UOF-1024-14.

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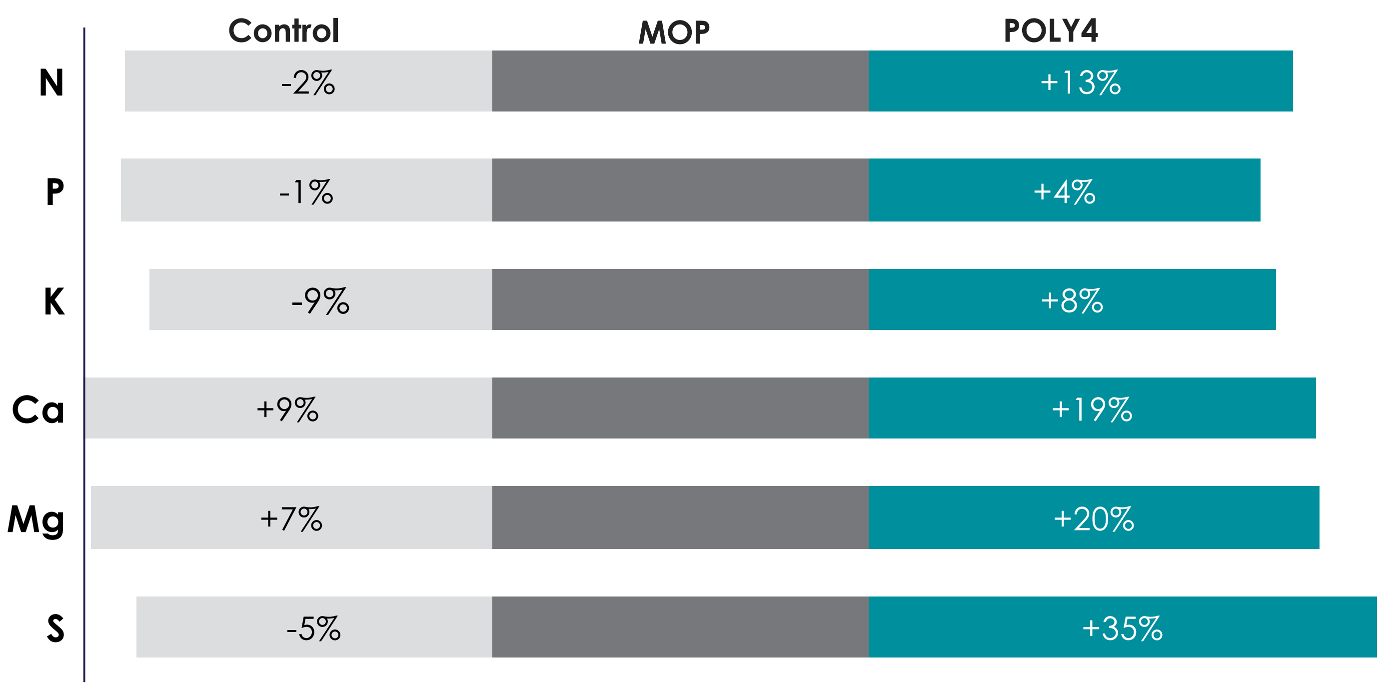
EU: SUSTAINED MACRO-NUTRIENT DELIVERY

Macro-nutrient uptake results from EU trials[1]

Improvements in macro-nutrient uptake compared to MOP



Initial soil analysis[1]

Soil measurement	Value
P (mg kg^{-1})	56
K (mg kg^{-1})	113
Mg (mg kg^{-1})	98
Ca (mg kg^{-1})	2047
S (mg kg^{-1})	5
OM (g kg^{-1})	19

KEY TAKEAWAY: POLY4 OUTPERFORMED MOP IN MACRO-NUTRIENT UPTAKE

Notes: 1) The results are based on 11 EU trials covering both high-value and broad-acre crops such potato, wheat, barley, oilseed rape, silage corn, corn and celery.
Source: Sirius Minerals

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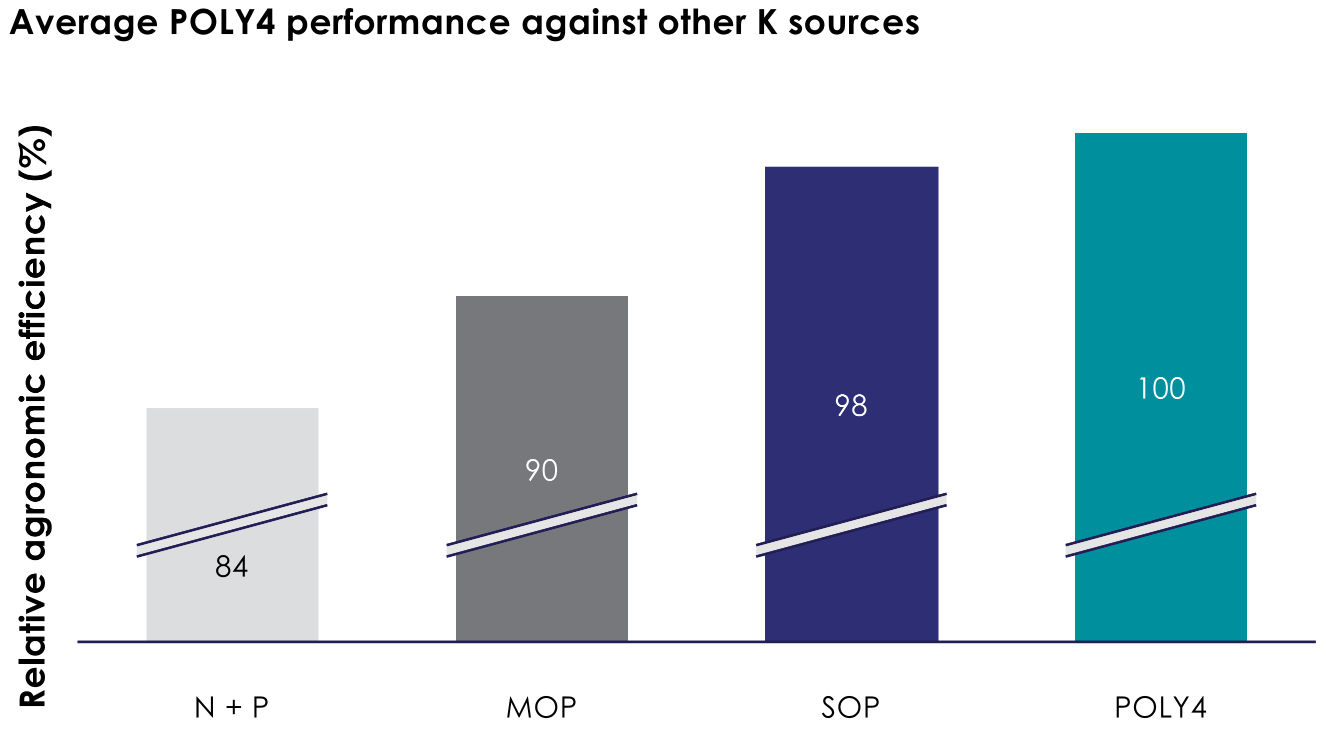
EU: POLY4 PERFORMANCE COMPARED TO POTASH SOURCES

Yield results from 23 straight EU trials



Initial soil analysis

Soil measurement	Value
P (mg kg^{-1})	63
K (mg kg^{-1})	105
Mg (mg kg^{-1})	80
Ca (mg kg^{-1})	1630
S (mg kg^{-1})	4
OM (g kg^{-1})	15

KEY TAKEAWAY: POLY4 OUTPERFORMED MOP AND SOP

Notes: Crops include: barley, oilseed rape, corn, potato, wheat and grass.
Source: Sirius Minerals.

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CROP QUALITY

Tomato quality

- Brix (sweetness) +1.6%
- Firmness, indicating shelf life +1.3%
- Titratable acidity (reduction in sharpness) -3.8%
- Tomato bacterial spot – 38% reduction in severity compared to MOP 72 days after planting

Cereals

- Increased grain nutrients
- Lower N:S ratio in leaf
- NDVI rating
- Improved tiller numbers
- Reduced lodging

Potato quality

- Specific gravity – 1.07, indicates dry matter content 20% which is important for frying quality
- Tuber brightness score 6.5 indicating tuber health and disease resistance

Turf

- Higher NDVI
- Microgranule complete dispersal in under a month
- Improved longevity of turf quality
- Improved/better control of red thread disease

Sources: Tomatoes: University of Florida (2015) 1000-UOF-1021-15, University of São Paulo (2014) 4000-USP-4011-14; Potatoes: University of Minnesota (2015) 14000-UMN-14011-15; Cereals: Warwick University (2016) 8000-WCC-8014-15; North Dakota State University (2014) 15000-NDS-15010-14; Turf: STRI (2017) 71000-STRI-71010-17.

WHAT IS THE BEST MEASURE OF FERTILIZER USE EFFICIENCY?

Common measures of NUE compared

Term	Calculation	Objective
Partial factor productivity	PFP = Y/F	How productive is this cropping system in comparison to its nutrient input – long-term trend indicator.
Agronomic efficiency	AE = $(Y-Y_0)/(F-F_0)$	Production gain from nutrients – short-term impact on yield.
Partial nutrient balance	PNB = U_H/F	Output compared to input – nutrient balance trends.
Apparent recovery efficiency	RE = $(U-U_0)$)/$(F-F_0)$	How much of the applied is taken up – comparing management practices.
Internal utilization efficiency	IE = Y/U	Offtake compared to uptake – comparing genotypes.
Physiological efficiency	PE = $(Y-Y_0)/ (U-U_0)$	Improvement in yield compared to improvement in nutrient uptake – compare practices.
Fertilizer use efficiency	FUE = U/F	Efficiency of nutrient capture – to compare systems.

Y = yield, Y_0 = yield without nutrient, F = fertilizer applied, U_H = Nutrient in harvested parts, U = nutrients in above ground biomass with nutrient applied, U_0 = nutrient in above ground biomass with no nutrient applied.

KEY TAKEAWAY: **EFFICIENCY MEASUREMENTS ARE NOT COMPARABLE AND MAY NOT ACCOUNT FOR ALL ASPECTS, SI, EC, NUTRIENT BALANCE**

Sources: 1) Glenn et al (2008), 2) Thompson (2012), 3) Syers et al., 2008).

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THINK OUTSIDE THE BOX WHEN EVALUATING FERTILIZER

Providing economically optimum nourishment to the crop while minimizing nutrient losses from the field

FOOD DEMAND
- 2 X more in 30 years
  Representing 2.4% CAGR[1]

SOIL RESIDUES
- Adjust applications to account for soil values — N,P,K Ca, Mg, S

BIGGEST ISSUES[2]
- Nutrient use efficiency
- Water use efficiency

NUTRIENT RECOVERY
- N – year of application
- P and K – years after application

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KEY TAKEAWAY: TOTAL SYSTEM NUTRIENT MASS BALANCE SHOULD BE CONSIDERED

Notes: 1) Glenn et al (2008), 2) Thompson (2012), 3) Syers et al., 2008).

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THANK YOU

Any questions please contact:

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