

Structural changes to the fertiliser industry

By Adam Mostert, CEO of Fertasa

The South African fertiliser industry has undergone structural changes since the beginning of the century. It has been transformed from an industry with a few large fertiliser producers to an import-dependent industry, including roughly 80 smaller blenders. The resultant competition among suppliers at farm level gives crop producers a multitude of options.

The Fertiliser Association of Southern Africa (Fertasa), previously known as the Fertiliser Society of South Africa (FSSA) has also undergone changes to adapt to the evolving needs of the industry. As a result, we have seen an increase in membership numbers from a mere 19 in 2012 to 48 in 2016.

These members are importers, producers, distributors and blenders of inorganic and organic fertilisers, agricultural lime and biofertiliser products. Therefore, our members encompass the full value chain and all three fertiliser groups defined in the *Fertilisers, Farm Feeds, Agricultural Remedies and Stock Remedies Act, 1947* (Act 36 of 1947). This act is currently being revised by the registrar and the new *Fertiliser Bill*



will be made available for public comment early next year.

Nutrition and regulations

The world population increased by 37,7% from 5,3 billion in 1990 to 7,3 billion in July 2015, and is estimated to reach 9,7 billion by 2050. The South African population alone increased by more than 50% over the same period, up to 2015.

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Without fertiliser, food shortages, famine and starvation would threaten the livelihood of one-third of the world's population. Nutrient deficiencies in soil, for instance zinc (Zn), lead to deficiencies in humans, especially where community members depend on the food produced in their area. Fertasa's main purpose is to promote responsible and sustainable soil fertility and plant nutrition.

The integrity of the fertiliser industry is focussed on developing and maintaining food producers' trust. Fertasa has taken action to ensure that its members have the facilities, systems and knowledge to produce fertiliser products according to set specifications that will not harm the environment.

This is achieved by means of a third-party audit based on the Fertasa code of conduct, which covers all the relevant legislation such as *Act 36*, environmental laws, and health and safety regulations. Fertasa issues a Code of Conduct Compliance Certificate to qualifying members. This certificate gives members

the right to use the seal of compliance on their documentation and their fertiliser product packaging. Fertiliser users are then encouraged to look out for this seal of approval.

Rainfall patterns and production

People will remember 2016 for different reasons. In South Africa, the political turmoil has overshadowed a serious natural disaster – the worst drought since formal rainfall records have been kept, aggravated by record-high temperatures. The cause of this devastating drought has been attributed to the El Niño effect, which is a well-known fact by now.

Something that is not always acknowledged is the cyclical nature of rainfall patterns in the summer rainfall region of the country. Scientists have pointed out that wet and dry periods occur in cycles of varying lengths. The lesson to be learned from the current situation is that production practices capable of tolerating drought and high-temperature conditions must be found.

Our farmers, assisted by agricultural scientists, have come a long way in adapting farming practices to these changing climatic conditions. The role of oilseed crops in the improved efficiency of crop production cannot be overemphasised. It is not only the value of the nitrogen (N) fixation properties of soya beans and canola, but the value of having a crop that fits into a rotational system that improves soil fertility and health.

South Africa is regarded as the only country on the continent that is self-sufficient in respect of its food supply, also being able to supply food to neighbouring nations. The knowledge and skills of the local agricultural community can go a long way in assisting the rest of Africa to realise its production potential. 🌱