Dear Readers,

CropLife Latin America is a non-profit industry trade association consisting of nine companies and a network of 25 associations in eighteen countries within Latin America. These organizations are recognized for their technological contributions to sustainable agriculture across the region.

CropLife conducts an annual forum at which we focus on the potential of the region to feed the world. This year we are in Buenos Aires, to discuss prescient topics for the Southern Cone. These include panels on aerial chemical application in Brazil, land use in Uruguay and Argentina’s Good Agricultural Practice network. We aim to motivate other countries to conduct their best efforts in ensuring sustainable innovation—a priority of our industry.

Argentina’s agricultural industry has experienced a rejuvenation in 2016. The elimination of export taxes on wheat and corn and a reduction in the taxes on soybean exports will impact positively on the agrochemical industry. We can expect to see growth of around 15% in 2016, with turnover for the full year reaching $2.7 billion.

Best regards,

Juan Cruz Jaime
Executive Director Southern Cone
CropLife Latin America

My main goal as the new president of Aapresid (the Argentine No-Till Farmers’ Association) is to continue working on improving the communication deficit we have with Argentina’s farmers. We also want to continue strengthening our technology base, which is fundamental to our institution.

The current economic environment in Argentina is positive. However, it will require energy and focus on our part to ensure that our agricultural industry will create more jobs, improve our soils, increase our production and care for our environment.

Our annual Congress is the perfect setting to demonstrate Argentina’s potential to produce food, fiber and energy in a sustainable way. Held between 3rd and 5th August 2016 in Rosario, it will have more than 250 speakers, 150 conferences and 5,000 attendees and is therefore the biggest event showcasing agricultural technologies in the world.

Pedro Vigneau
President
Aapresid
**A New Era in El Campo**

Although well known for its cosmopolitan lifestyle in the capital, upon leaving Buenos Aires, the urban landscape, crowds of Porteños and smart restaurants make way for miles upon miles of rolling green fields, crowned by a sunny blue sky in all directions. It was from this sky that President Macri arrived, by helicopter, to a field just outside Rosario on an afternoon in March 2016. His presence at Expoagro, the agricultural industry’s annual event, was significant. President had not been in attendance since before the turn of the millennium.

Addressing the assembled crowds, he spoke of an impending “production revolution” in the fields of Argentina: “We know that the world has a food crisis. We want our valuable raw materials to provide the solution.” He continued: “I have made it clear to the Ministry of Agroindustry that we have to take responsibility for the smaller producers – who may in time become medium- or larger-sized producers – because in order to achieve growth, we have to go forward together, as one family.”

Upon taking office in December 2015, Macri immediately demonstrated the importance of the agricultural industry to Argentina’s overall economic might; he removed controversial restrictions on agricultural products, introduced by Argentina’s previous administration to bolster government revenue. Making good on his campaign pledge, export taxes on foodstuffs such as wheat, corn and beef – which were at 23%, 20% and 15% respectively – were completely removed. Levies on soybean derivatives, of which Argentina is the world’s largest producer and exporter, remain in place, but were lowered from 35% to 30.

Maintaining restrictions on soybean exports indicates the crop could see a small dip in production, despite the fact it is 80% cheaper to grow than corn. However, a decrease of one million hectares on a crop that sees increase by around 700,000 hectares to 3.4 million ha. “As Argentina, as the world’s third largest producer of soybeans, fifth largest producer of corn and tenth largest producer of wheat, could do both.”

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A New Era in El Campo

With the world’s population set to grow to nine billion people by the middle of the century - spurred on by China’s termination of its almost 40-year old one-child policy in 2016 – global food producers will be under increasing pressure to improve yields and use resources more efficiently. Argentina, as the world’s third largest producer of soybeans, fifth largest producer of corn and tenth largest producer of wheat, could do both.

A speech to farmers following the official announcement of the removal of agricultural levies in December 2015, President Macri showed his awareness of Argentina’s potential to be the supplier for the increase in demand: “We have to go from being the breadbasket of the world to the supermarket of the world.”

During the current government’s four-year term, the intention is to increase production from 150 million tons per year (mt/y) to 160 million mt/y – an increase of 60%. The impact of removing taxes on crops such as wheat and corn has already been felt, with output set to hit record highs by 2017. “We can expect wheat acreage to grow by one million hectares to around 4.7 million hectares, this will however still be lower than the six million hectares we have previously seen,” said Ulrik Ekonen, south Latin America manager at Nufarm Argentina: “Argentina’s corn production will increase by around 700,000 hectares to 3.4 million hectares.”

**Lobbying for Change**

Argentina’s agricultural industry has a healthy relationship with the agrochemical industry, whose products will be key in improving yields. Representing the interests of agrochemical companies across the spectrum, from multinationals including Monsanto and Syngenta, to local players such as Agrofina and Gleba, are two organizations: the Chamber of Agricultural Health and Fertilizers (CASAFE) and the Chamber of Fertilizers and Agrochemicals (CIAFA).

CASAFE in particular focuses on promoting best practice and the responsible use of crop protection products to both regulatory bodies and the public. It has two programs in place to standardize practices in Argentina and to make good agricultural practices the norm across the industry. The first is Depósito OK, which aims to certify facilities used for the storage of agrochemicals. “We have around 600 to 700 certified facilities in Argentina, which is around 50% of the total facilities in the country. The uncertified facilities are usually smaller, local...
site; multinational companies will not sell their products to such facil- ities,” explained Federico Landgraf, CASAFE’s executive director.

CASAFE’s second program is Agrolimpio, a program endorsing the glob- ally recognized triple rinsing protocol of chemical containers and their subsequent emptying. CASAFE is ultimately lobbying government for a nationwide law to enforce the collection of these containers after use. Rostam Argentina, Dow AgroSciences and Rizobacter are also establish- ing a foundation to ensure the safe packaging and storage of agrochem- icals. “When agrochemicals are properly handled and disposed of correctly, there is no problem; however, when the correct procedures are not followed, toxic material can leak out into the envi- ronment and pose a danger to human health,” explained Rostam Argent- ina country manager Javier de la Rua.

CASAFE typically represented the interests of multinational companies in Argentina. With the government’s recent appraisement of the indus- try, the opportunity for growth may mean more international players decide to export their products in the country. Global corporations also bring with them global standards, which should work in CASAFE’s favour when seeking increased governmental, as well as popular, sup- port for more stringent safety regulation.

A third program run by CASAFE is Spray OK, which it hopes to begin roll- ing out across the country in 2017. Currently, anybody can use spray- ing equipment without certification. CASAFE, in partnership with the Institute of Standardization and Certification, aims to certify companies, operators and the machinery itself for both ground and aerial applica- tion of crop protection products. “Most companies do not own their own spraying equipment, preferring to rent it from larger companies. Our aim is to ensure best practice in the use and maintenance of these machines,” said Landgraf.

CIAPA, which has 53 members, is a uniting voice for agrochemical com- panies in Argentina. It works with regional and national government agencies on legislation affecting the industry, and also works with farm- ing associations to achieve its objectives. Although it has no barrier to membership, CIAPA is known for its work with Argentinian chemical companies: “We can promote local players by price and availability. If you import product from abroad, it could take around three months to arrive. This is not ideal in a market as dynamic as ours, so local products have the advantage,” explained Armandi Alighi, CIAPA’s executive di- rector.

Member company GLEBA, which has been in the market since 1950 and now has an annual turnover of around $40 million following a cash in- jection of $1.5 million into its plant at the turn of the decade, is support- ive of the opportunities provided by CIAPA. “CIAPA is a great platform to share ideas, problems and solutions, as well as to network with firms,” CIAPA and CASAFE share a good relationship and there are many areas on which we share points of view. However,” remarked GLEBA’s com- mercial manager Miguel Seara, “it is also beneficial that we are able to discuss different points of view with complete freedom and openness.”

For GLEBA, one of the main issues affecting the agrochemical industry at present is the rapid opening up of the market and the effect uncon- trolled competition has on local players. Under the previous ad- ministration, domestic chemical companies enjoyed import restrictions on formulated products from abroad; with the removal of these restric- tions, combined with a lack of investment into improving checks on imported products, the industry fears low quality chemicals will make their way into the value chain. “Competition in the agrochemical market is high in Argentina and we need more control over Chinese companies importing into Argentina,” explained Seara. “The industry needs to see several stages of checks on imported products, covering areas such as environmental protection, processing and impurities, as SENASA does not conduct 100% checks.”

FERTILE SOILS

Argentina is particularly proud of its fertile soil, which has been safe- guards. “When agrochemicals are properly handled and disposed of correctly, there is no problem; however, when the correct procedures are not followed, toxic material can leak out into the envi- ronment and pose a danger to human health,” explained Rostam Argent- ina country manager Javier de la Rua.

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How important are programs such as Responsible Use and could you tell us more about sustainability and environmental stewardship in Argentina’s agricultural industry? Misusing agrochemicals is an acute problem which we are working very hard to solve. Almost two decades ago we implemented a program called Certified Agriculture, which guarantees those with this certification are working in an environmentally friendly manner and in accordance with the law. There are protocols for various soil and water samples to be checked and reported. This quality control program is gaining ground among farmers who see the need for such certification programs internationally. We also provide financial incentives from external economic reserves to encourage more farmers to become certified.

In 2015, Aapresid began working with IRAM to certify machinery and operational procedures during spraying, planting and harvesting. We are also working with the provincial governments of Santa Fe, Cordoba and Buenos Aires on certification for sprayers; the ultimate aim would be that without certification, workers would be unable to use such products. This is a slow process but once we succeed in these provinces, we can extend the program to the rest of the country.

Could you tell us more about the introduction and promotion of no-till farming in Argentina? The no-till system was introduced to Argentina in the 1970s when a group of farmers with the National Institute of Agricultural Technology (INTA) began to prove the no-till concept in Cordoba province. At the beginning, the biggest obstacle was obtaining agrochemicals for weed control that were both compatible with the no-till method and reasonably priced. Furthermore, due to the lack of specialized machinery, no-till farming was in large part abandoned. By the middle of the 1980s, soil erosion had again become such a problem that there was renewed interest in no-till farming. Although adoption of this technique increased, it was very hard to encourage such a dramatic shift in agricultural practices. A group of farmers began to prove the technique and developed specialized machinery required. Farmers and the machinery then began to work together to develop machinery not just tailored to the new requirements of no-till farming, but also to the needs of individual regions.

However, it was the middle of the 1990s when no-till farming really took off, following the approval of genetically modified soybeans for use in Argentina. Approximately 92% of farmers use the no-till method nowadays. When the system is combined with crop rotation, it improves all the soil's physical, chemical and biological properties. Aapresid then went on to develop a program for the strategic use of fertilizers, leading to further improvements on the quality and stability of crop yields, while reducing water usage. These farming practices have also led to an increase in the capture of atmospheric carbon, equipping us with a new tool in the fight against climate change. Our soils are now in great shape to withstand issues that may arise in the future, such as flooding and drought cycles.

How has Aapresid developed over the last quarter of a century and what services do you provide your members? The association began as a group of around 20 farmers in the late 1980s in response to concern concerning poor land management, leading to soil erosion. The aim was to use local farming to promote no-till farming methods and as a tool to prevent soil erosion from the water and the air. At present, Aapresid has around 2,500 members; these are farmers from both established and smaller farms across the country, as well as technicians. Our first activity centered on farm days; farmers advised other farmers on important issues, which worked out very well. We then implemented a newsletter, containing articles on topics such as no-till farming. This has since developed into our monthly magazine Red de Innovadores/Network of Innovators.

What will Aapresid be focusing on in future? We strongly believe that following good agricultural practices is the only way to create economic, environmental and social stability in the agricultural industry. The keys to this are the no-till system; continued soil cover by the crops or protective coverings, protecting the soil from exposure to air, wind and rainfall; crop rotation to improve diversity and intensity, integrated management of weeds, insects and diseases, using strategic and balanced nutrition; choosing specific agrochemical and biological controls, with responsible use of crop protection products in terms of correct product choice, operators and application.

With so many of Argentina’s farms using the no-till method, our mission has shifted towards promoting a sustainable system for food, fiber and energy, based on our network of innovators. Here at Aapresid, we believe we can be a strategic collaborator with local, provincial and national governments. We believe Aapresid is a brand which can be extended to focus on this sustainability objective and to ensure the quality of the soil for the future. In the future, we will also have rules for the correct usage of agrochemicals.

Compared to two decades ago, Argentina’s fertilizer production is fairly strong, due partly to YPF and Agrium’s joint venture into Profertil. The urea plant, located in Bahía Blanca, now produces around 89% of Argentina’s urea and 89% of Argentina’s ammonia, and was able to export 15,000 mt/y in 2014. Profertil has transformed domestic fertilizer production with around 45% of the fertilizers used in Argentina being nitrogen based and reliant on natural gas as a feedstock. “The domestic urea market in particular faced a significant production deficit. More than 90% of Argentina’s total fertilizer consumption – more than 1.5 million tons – was imported, while urea demand was at around 600,000 tons,” explained Miguel Morley, vzw’s president. While Profertil is Argentina’s domestic fertilizer company, its main competition comes from U.S.-headquartered Bunge. While Argentina’s annual harvest is around 100 million tons, Bunge’s Blassi claims the fertilizer market is...
It appears that not only Bunge is aware of the potential in Argentina’s tally friendly measures,” said Bassi.

“Just a few months before the elections, farmers were increasingly uncertain about future investments. New crop growth will require both more goods such as wheat, corn and sunflower without as many difficulties as before. As well as an increase in our local market, I think we will also see the size of the average farm expand. An increased use of technology will also encourage greater yield. Although there may be some financing problems, which could limit growth, the feeling among farmers and the agrochemical industry in general, around both production and new technology, is positive. The new administration also wants to increase production from 130 million tons per year (tpy) to 160 million tpy over their four-year period in government.

With the change in government, what positive developments are we seeing for the agricultural industry?

In the past, Argentina implemented difficult policies for farmers which caused them to end crop rotation in favor of planting the highest value crop, such as soybeans. This was detrimental for soil quality, as the public has a negative perception of the crop protection industry due to the improper use of agrochemicals. By encouraging best practices across Argentina, this will both improve the efficacy of crop protection products and lower the associated risks. Technology and new formulations can also help to reduce the impact of these products in populated areas. It is easy for our producers to introduce new technologies, as the uptake by farmers is rapid when compared with other countries.

Could you tell us more about how Macri’s agricultural reforms will improve the situation for the agrochemical industry through 2016?

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agricultural production, agrochemical companies are seeing 2016 as a transition year to bigger and better things.

WEED RESISTANCE
The three most commonly used crop protection products in Argentina are glyphosate, making up around 78% of total agrochemical sales in the country in 2013, followed by atrazine and 2,4-D. Monsanto discovered glyphosate in 1970 and it was brought to market under the trade name Roundup in 1974. The company then produced glyphosate-resistant seeds, increasing crop production dramatically. It therefore comes as no surprise that around 90% of Argentina’s main crops, such as corn and soybeans, are genetically modified.

Around 200 million liters of glyphosate and nine million liters of 2,4-D are sold in Argentina per year, with local company Chemotecnica producing more than half of the country’s 2,4-D requirements. UPL Argentina, which is moving away from commodity agrochemicals to a more differentiated portfolio, stated herbicides have a 65% market share compared to other types of crop protection products: “Because of Argentina’s no-till system, farmers consume herbicides year round. Insecticides and fungicides, on the other hand, are seasonal products and account for $300 million and $250 million of the overall market respectively,” said Fernando Lespiau, commercial director at UPL Argentina. Glyphosate alone accounts for $800 million of the $2.5 billion agrochemical industry in Argentina, but is losing ground to specialised formulations as a result of increasing glyphosate resistance in weed varieties. Companies such as Arysta LifeScience are shifting the focus of their research and development activity onto new preparations, which is proving a shrewd move: “Our main product and income generator continues to increase,” explained Eduardo Maier, director of marketing and R&D. “Clothothin ranks number three worldwide for herbicides and, despite the overall decrease in the agrochemical market last year, it saw a 25% increase in sales volume.”

Agrolina is one of very few companies in Argentina which has the capabilities to synthesise its own products. With 85% of the global agrochemical market based on sales of commodity chemicals, and 93% in Argentina, national players such as Agrolina need to innovate in order to compete against multinationals and provide new solutions for farmers: “We have deep process knowledge on new ways to formulate and manufacture product and this has become our core business,” said CEO Horacio de Agrolina’s parent company, Grupo Los Grobo. “Being an Argentinean company, we are able to tailor our products to the local market, unlike multinationals which produce the same chemicals for all their markets.”

JOINING FORCES
Public opinion surrounding the use of agrochemicals is of concern to companies and growers alike. Both CIAFA and CASAFE focus on the need for education about the benefits of crop protection products, particularly in conjunction with responsible use programs, and CASAFE has also initiated a social media campaign to reach out to young people. “The public has a negative perception of the crop protection industry due to the improper use of agrochemicals,” said CIAFA’s Allinghi. “By encouraging best practice across Argentina, this will both improve the efficiency of crop protection products and lower the associated risks.”

Best practice is particularly important in the application phase of various agrochemicals, and CASAFE works with the Ministry of Agroindustry to promote their safe and effective use. This covers a variety of topics from standard spraying procedures in certain weather conditions, required wind speeds for best results and correct safety distances for highly populated areas. However, the program has not yet reached everyone involved, as outlined by Arysta’s Maier: “One of the big problems we have in this area is the use of contracted chemical sprayers, who are paid by hectare and therefore do not always take product application issues, such as wind speed and direction and proximity to populated areas, into account. CASAFE is working hard to educate people in the effects of product drift, for which there was a big campaign in 2015. If these sprayers adhere to the guidelines, there will be no problems with either ground or aerial application.”

Furthermore, argues UPL’s Lespiau, more than 50% of Argentina’s arable land is not owned by the farmers who grow crops on it: “This leads to a focus on production and profit rather than environmental stewardship. Armstrong requires some new legislation on how to properly manage rented fields, which will improve the sustainability of our farmland,” he said.

Aapresid is also working with the governments of Santa Fe, Cordoba and Buenos Aires provinces to gain certification for sprayers, with the aim of rolling this program out across the country following success in these key regions. “Misusing agrochemicals is an acute problem which we are working very hard to solve,” explained Aapresid’s Giaruddo. “The ultimate aim would be that without certification, workers would be unable to use such products.”

LINING UP THE ALTERNATIVES
An area which is coming into its own in Argentina is biotechnology, which aims to genetically improve a plant’s growing habits, for example by improving its resilience to pests and extreme weather conditions. According to Agrolina’s Buscainville, the mergers of Dow and DuPont, and ChemChina’s acquisition by Syngenta, are indicative of wider global trends in this area. “Companies are realising there is no single solution to increasing yield and it will take a combination of biotechnology and agrochemical technology to achieve the desired effect. In five years, the chemical market will look very different to now.”

The industry as a whole is also feeling the impact of the global trend for
sustainable operations and green solutions. This is particularly felt by multinationals and domestic companies working on joint ventures with international players, such as Chemotecnica, which is moving towards a more environmentally friendly portfolio of products with several U.S. companies. “We are seeing the market for solvent-based formulations reduce, while demand for green products and environmentally friendly solutions is increasing,” said the company’s president, Alejandro Goffari. Some companies are modifying their entire business model to embrace bio-solutions, such as Brometan, which is the only company in Argentina working on crop-oriented biological controls. Its solutions are typically more expensive than traditional crop protection products, but it claims the return on investment is far higher than normal. Working with global companies on innovative solutions, general manager Pablo Ramondo notices the differences between attitudes towards chemical usage internationally compared with Argentina. “There is not a real consciousness of healthier foods among our local consumers and there is no clear legislation concerning fresh food production. A small number of producers are concerned about how to produce fresh products using sustainable and safe solutions and, for domestic consumption, quality is low and chemical usage is higher,” claimed Ramondo. “For external production, buyers establish the rules and production uses greener and gentler chemicals.” However, with external markets leading the way, Argentina and the rest of South America will soon follow. Brometan believes that Argentina is at the forefront of a change in attitudes and is developing products accordingly. “Our portfolio, with its spread of traditional and greener products, is intended to manage the bridge between current usage trends and the requirements of the future,” continued Ramondo. Aprosid is also promoting greener farming practices with financial incentives, based on the European Commission’s Roundtable on Responsible Soy certification. This standard, implemented to manage the bridge between current usage trends and the requirements of the future, continues Ramondo. “The Roundtable for Responsible Soybean is a fund that promotes greener farming practices with financial incentives for soy production. Our certification program is much wider and farmers following this program receive a better payment for adopting sustainable soil practices.”

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- Horacio Busanello, CEO, Agrofina

“The Argentine farmer is part of a value chain which has incorporated a range of technology in recent years, including in seeds, equipment and knowledge. Argentina has an incalculable potential in terms of the agricultural sector.”

- Mauro Piva, General Manager, Nova

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The first improvement in agricultural yield followed the introduction of hybrids in the 1980s, while the second followed the introduction of no till farming and genetically-modified seeds in the 1990s. Argentina is now long overdue for a third wave of improvement in the sector. Chemotecnica’s Goffari believes this will stem from precision chemical use and combining new crop protection technologies with fertilizers. “As yields increase, it will become even more important to protect crops. Farmers may not choose to apply pesticides or fungicides if the difference will only be around 7% of yield increase. However, if farmers can improve the differential to 30% or 40%, demand for crop protection products will rise,” he explained. “Focusing on the crop protection and environmental health sectors will enable us to achieve the government’s goal.”

The aim of the incumbent government is to increase Argentina’s agricultural output by 60% by the end of the decade. Agrofina’s Busanello believes production could increase by 20% for 2017/18. Argentina has the potential to increase productivity, not only by converting up to four million more hectares of viable land into crop fields, but also by increasing its use of biotechnology. The fertilizer industry, spurred on by Profertil’s expansion of its Bahia Blanca site in 2013 and the Soil Improvement Law, is also growing. Combining better practices and increasing the usage of fertilizers, seed technology and crop protection products should see the sector produce not only enough to satisfy domestic demand, but also create a surplus to dominate the supply chains of such crops across South America.

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