**Technical Specification applies to:** Preparation of a comprehensive analytical and market report on the fertilizer market

**I. Subject of the Order:**

The subject of the order is the preparation of a comprehensive analytical and market report on the fertilizer market, including in particular:

* market analysis,
* sales market analysis,
* competition analysis,
* preparing a producers’ database.

The report must not be based solely on statistical data or publicly available information but should constitute an in-depth business analysis, taking into account expert knowledge, trend interpretation, and strategic conclusions.

To ensure market flexibility, the right to submit partial offers has been provided – the Contractor may offer to execute individual areas or tasks listed in Section III.

**II. Scope:**

1. **Markets covered by the analysis:**

* European Union (with particular emphasis on the Polish market),
* European Economic Area countries outside the EU,
* Turkey,
* United Kingdom (UK),
* Ukraine.

**2. Product categories:**

The report must consider the division into the following product categories:

* Mineral-organic fertilizers, with distinction between:
  + fertilizers dedicated to regenerative agriculture,
  + fertilizers containing algae,
  + fertilizers containing humic substances.
* Organic fertilizers, with distinction between:
  + fertilizers dedicated to regenerative agriculture,
  + fertilizers containing algae,
  + fertilizers containing humic substances.
* Biostimulants.

**III. Detailed Scope of Work:**

For each of the above-mentioned product categories, the Contractor is required to carry out the following elements:

**1. Market Analysis:**

* Determining market size in value and volume terms relative to the overall fertilizer market segment.
* Segmenting the market and analyzing size and value (production and domestic/export sales volumes) for the specified regions (European Union with particular emphasis on the Polish market; European Economic Area countries outside the EU; Turkey; UK; Ukraine). - Analyzing fertilizer price levels (average prices per country as of December 2025).
* Presenting market growth rates (historical data: 3–5 years back).
* Developing forecasts for market growth over the next 3–5 years and beyond 2035.
* Identifying key national, European, and global market trends.
* Creating a list of key producers.
* Characterizing distribution channels used by key producers.
* Forecasting the analyzed fertilizer market value up to and beyond 2035, including the segment’s share of the overall fertilizer market (basis for assessment).
* Analyzing potential import directions.
* Analyzing potential export directions.

**2. Sales Market Analysis (production and domestic/export sales volumes) for the specified regions (European Union with particular emphasis on the Polish market; European Economic Area countries outside the EU; Turkey; UK; Ukraine + prospective markets):**

* Structure and characteristics of production in agricultural holdings.
* Role/% share of fertilizers in the analyzed segment within farm fertilization plans/overall fertilization – possibility/period of application.
* Economics of fertilization with the analyzed segment of fertilizers.
* Analyzed segment fertilizers vs. mass nitrogen fertilizers – projected consumption in large/medium/small farms up to 2035 and beyond 2035.

**3. Competition Analysis:**

* Listing 10–15 key producers.
* Determining their market shares.
* Benchmarking product innovations introduced by competitors.
* Conducting SWOT analysis for the industry and leading market players.

Additionally:

- Analyzing whether the anticipated demand for the analyzed fertilizer segment by target recipients will result from economic, agronomic, or regulatory factors, broken down by small, medium, and large farms.

- Analyzing whether the analyzed fertilizer segment aligns with Agriculture 2035+ (fertilization efficiency, market competition – resilience to competition outside the EU, Mercosur, etc.).

- Analyzing whether the analyzed fertilizer segment represents a genuine response to current regulatory requirements as well as those expected and realistically implementable in the future.

**IV. Requirements for the Contractor:**

* Must have documented experience in preparing reports for the agrochemical or fertilizer industry.
* Must provide at least 2 references for similar analyses carried out (in the last 3 years).
* Must have an analytical team with documented experience.

• Technical offer – containing information consistent with the request for quotation, indicating the scope that the tenderer declares to perform.

**V. Requirements for a formal offer:**

1. The proof of company foundation (it is required to enclose the Certificate of Incorporation issued not earlier that 3 months before the deadline for biding in pdf file).  
2. Confirmation that the bidder has read and accepts the DOCUMENT: Conditions of Participation in the RFI Request for Information Procedure.

**VI. Requirements for a commercial offer:**

1. Under the ‘Price’ criterion, please enter the net price for the performance of the Subject of this Request for Proposal in accordance with the technical offer. Please attach a cost estimate for each item of the offered scope.

2. The price should be given as a net amount and must include all additional charges incurred during the performance of the service.

3. The price may only be indicated on the Connect Platform in the space provided for this purpose.

**VIII. Deadline:**

1. **Deadline for executing the order:** up to 3 months from the date of signing the contract.

**IX. Method of Executing and Accepting Work:**

1. **Review:** The report will undergo a review process by representatives of ANWIL S.A.
2. **Final version:**
   * Format: PDF file submitted electronically and on an external data carrier.
   * Language: Polish or English (PL/ENG).
   * Sources: All data (charts, tables, graphics) must include documented sources (citations, bibliography).
3. **Acceptance:** After incorporating any corrections and additions resulting from the review process, the documentation will be handed over, confirmed by an Acceptance Report. Upon final acceptance, the proprietary copyrights to the report will be transferred to the Ordering Party.