Organic-based fertiliser markets and the circular economy

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In partnership with:

I – market potential

European Commission[a]:
EU fertilising products market = 20 – 25 bn.€
of which: 80% (18 bn.€) inorganic, and 6,5% (1,5 bn.€) organic and organo-mineral

Fertilizers Europe[b]:
Turnover inorganic fertilisers production = 11 bn.€
(Coherent with above because 30% (N) to >70% (P, K) of EU consumption is imported)

Market surveys:
EU organic fertilisers industry turnover[c] = 2,5 bn.€
EU organic fertilisers market expected[c] growth: 4,5% / year
Global market expected[d] growth: 12-13% / year

(a) COM EU Fertilising Products Regulation impact assessment, SWD(2016) 64 final, and "Fertilisers Study" 2012
(b) Fertilizers Europe "Industry Facts and Figures 2018"
(c) Allied Market Research 2016. In fact turnover probably higher due to exports https://www.alliedmarketresearch.com/europe-organic-fertilizer-market
(d) https://www.marketsandmarkets.com/Market-Reports/organic-fertilizer-Market-171744317.html and https://www.reuters.com/brandfeatures/venture-capital/article?id=29370

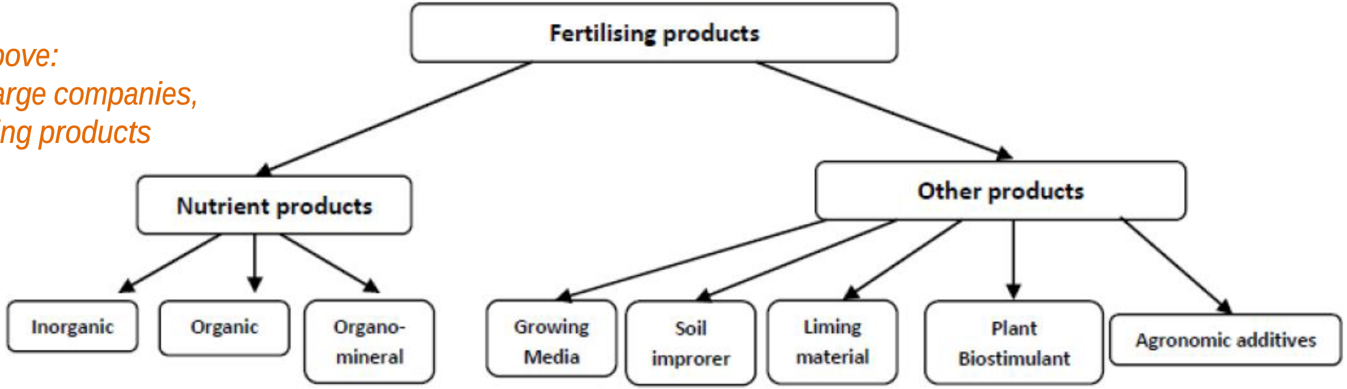
II – industry structure

Current organic fertilisers industry turnover is c. one quarter of inorganic fertilisers, but growing

Mainly SMEs[a]

Close ties to biostimulants, humic acids …

(a) COM FRP Impact Assessment as above:
75% of inorganic fertilisers market is large companies, whereas 98% is SMEs for other fertilising products



% market value: 80% 4,5% 2,0% 6,0% 2,3% 2,3% 2,3% 0,8%

II – industry structure

European Sustainable Phosphorus Platform

Organic fertilisers SOFIEurope 1st summit

Two European industry federations:

ecofi – European Consortium of the Organic-Based Fertilizer Industry

7 member companies
www.ecofi.info

EUROFEMA
European Organic Fertilizers Manufacturers Association

Confederation of (5) national associations,
www.eurofema.eu

EU COM survey *(for FRP Impact Assessment)*

- responses from 61 SMEs in 10 Member States only

- COM estimate a total of >3000 SMEs in total *(all FPR categories)*

III – industry perspectives

The organic fertilisers industry is currently largely structured by national markets

→ likely to change with EU Fertilising Products Regulation (FPR) and other EU policies:
REACH, Animal By-Products, Circular Economy …

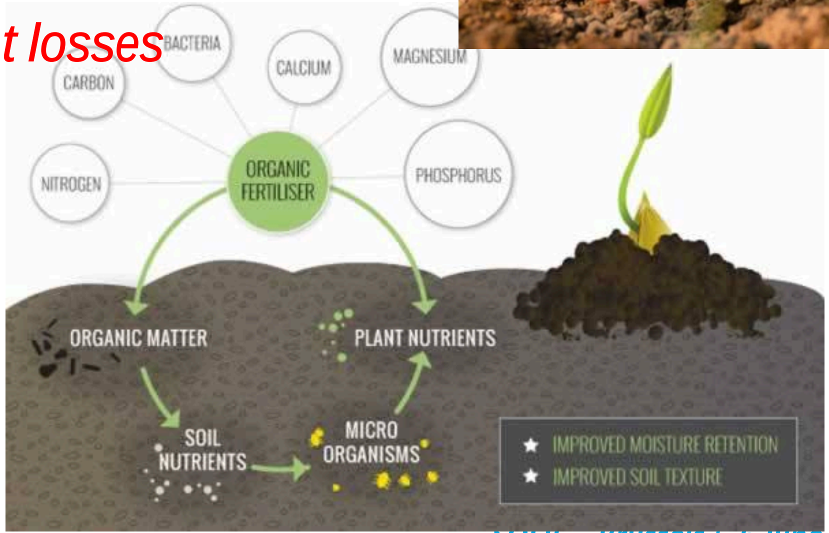
FPR will create a European market for:
- organic-based fertilisers products
- processing and production technologies

Agri-food sector purchasing criteria may specify EU-Mark

IV – agronomy

Possible benefits:

- *Root development*
  - Soil structure and biology
  - Drought resistance
- *Water retention/ soil erosion*
- *Nutrient use efficiency/ lower nutrient losses*
- *Not aggressive to plants*
- *? Organic carbon (4 per mille) ?*
- *Circular economy*
- *More effective some cultures (e.g. winter wheat)*
- *Complementary with inorganic fertilisers*



V – Phosphorus stewardship

European Sustainable Phosphorus Platform

Organic fertilisers SOFIEurope 1st summit

Nutrient recycling:

- Manure
- Animal by-products
- Composts
- Digestates
- Biochars
- Food industry by-products
- Other bio-industries:
  - fibres, wood, paper, biorefineries …
- (Micro) algae (e.g. sewage treatment)
- Farm / crop wastes
- Non-food crops, seaweed …

Improved Nutrient Use Efficiency / reduced losses

VI – Why SOFIE?

Bring together the organic-based fertiliser industry at the European level
Implementation and implications of the new EU Fertilising Products Regulation
Dialogue with agronomists (with IFS), mineral fertiliser industry, stakeholders

Role of ESPP:
- *promote: phosphorus stewardship, nutrient circular economy*
- *not competing with industry federations*

SOFIE beyond this first Summit?
- *Interest of industry? science?*
- *Implementation of EU FPR ongoing …*
- *How to widen promotion / participation to other SMEs, other regions?*
- *Improve timing, links to other sectors (biostimulants, composts, digestates, ABPs …)?*
- *Review format and content …*

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