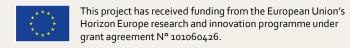
Diagnosis: regulatory barriers hindering the market uptake of circular fertilisers

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Objective



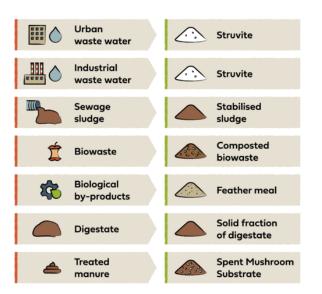
Assessing policies and legislations impacting on the **production**, **application**, **marketing** or **promotion/financing** of circular fertilisers.

- Identify current regulatory obstacles hindering the adoption of circular fertilisers by end-users as well as regulatory drivers promoting their use.
- 2. Propose policy recommendations to overcome those regulatory obstacles.
- Propose new regulatory drivers that can further stimulate the market of circular fertilisers.



Scope

7 circular fertilisers value chains

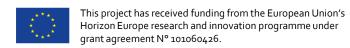


3 levels of governance

International level
European level
National level (AT, BE, DK, FR, DE, GR, IT, NL, ES, SE)

Adopted legislation and legislation currently in the process of being adopted





Methodology



Identification of policy experts → 46 policy experts

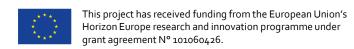


Interview process + online survey → 24 interviews + 20 answers to the survey



Analysis of interviews and survey responses, supplemented by co-creation tasks and literature review

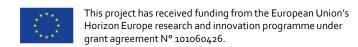




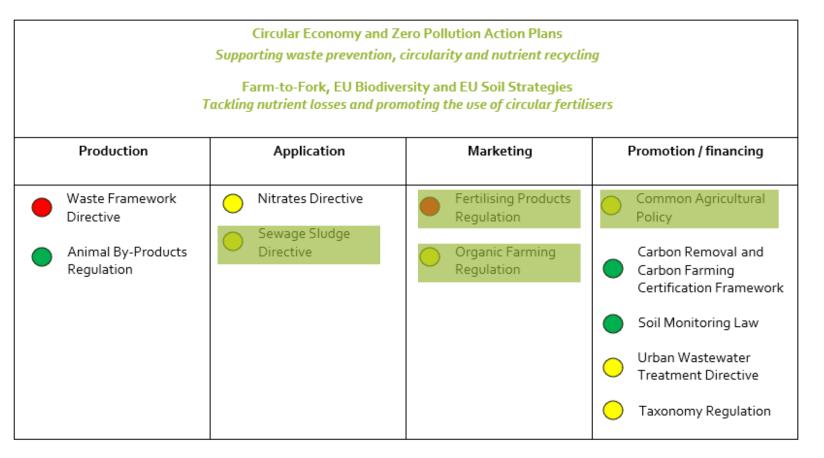
What is the diagnosis?





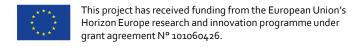


European level (& national level)



- Certain legislative provisions are significantly hindering the adoption of most FER-PLAY circular fertilisers.
- Ocrtain legislative provisions could be refined to better encourage the adoption of most FER-PLAY circular fertilisers.
- The current legislation is either not obstructing or is actually encouraging the adoption of most FER-PLAY circular fertilisers.





The Sewage Sludge Directive

Which FER-PLAY circular fertilisers are governed by the Sewage Sludge Directive?

| ~ | ~ | ~ | | | ~ | |
|----------|----------|----------|----|----|----------|-----|
| UWW | IWW | SS | BW | FM | DIG | SMS |



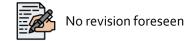
Lack of regulation of problematic contaminants or low standard for sewage sludge.

Excessive strictness at national level, inconsistencies between national laws. General distrust of farmers in **struvite**, **stabilised sludge** and **digestate from sewage sludge**.

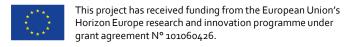




The Sewage Sludge Directive must be updated to potentially include stricter concentration limits for heavy metals and set limits for additional pollutants. This revision would increase farmers' trust in circular fertilisers, thereby promoting their use in agriculture.







The Fertilising Products Regulation

Which FER-PLAY circular fertilisers are included in the FPR?





Certain circular fertilisers not yet included in the FPR (e.g. **feather meal**, **spent mushroom substrate**). Overly stringent requirements for certain PFCs and exclusion of input materials from certain CMCs (e.g. **digestate**, **compost**).

Major discrepancy between the ABPR and the FPR limiting the processing of **compost** and **digestate** into EU fertilising products to only the standard transformation parameter.

Incomplete implementation of the FPR (e.g. lack of published EU-harmonised standards for testing methods by CEN, absence of notified bodies in some countries).

Overly complex legislation and difficult to operationalise.

Unnecessary alignment of the national legislation with the EU Fertilising Products Regulation.



The FPR's requirements must be reviewed to establish achievable standards for producers and to include new materials like sewage sludge and industrial solid waste and sludge from food processing plants.

The inclusion of **feather meal** and **Spent Mushroom Substrate** in CMC 10 must be sped up.

Alternative transformation parameters authorised by national competent authorities under the ABPR must be permitted to treat animal by-products that will be used as input materials for **compost** and **digestate**.

he implementation of the FPR requires the establishment of new notified bodies and the publication of EU-harmonised testing standards through CEN. In the longer term, simplifying procedures and making certification more accessible for smaller companies would be beneficial.

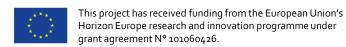
Member States must maintain a separate national legislative framework, setting their own requirements for marketing products as soil improvers or fertilisers.





Technical adaptation of FPR Annexes + Evaluation in 2025





The Organic Farming Regulation

Which FER-PLAY circular fertilisers are included in the OFR?

| UWW | IWW | 55 | BW | FM | DIG | SMS |
|-----|-----|----|----|----|-----|-----|





Lack of definition of the concept of "factory farming" at EU level.

→ Results in varying interpretations among Member States and a lack of harmonisation.



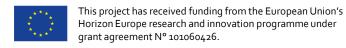


The Regulation must be updated to allow the use of struvite certified under national legislation in organic farming.

The concept of "factory farming" needs to be clearly defined at the EU level, or further guidance should be provided for Member States to establish their own definition.







The Common Agricultural Policy

Which FER-PLAY circular fertilisers are included in the CAP?

| ~ |
|----------|----------|----------|----------|----------|----------|----------|
| UWW | IWW | 55 | BW | FM | DIG | SMS |



Absence of mandatory measures, under SMRs or GAECs, requiring farmers to produce or use circular fertilisers in the CAP 2023-2027.

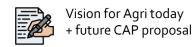
Lack of ambition from Member States to introduce additional voluntary measures under eco-schemes and rural development programs to further support the uptake of circular fertilisers.



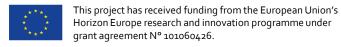


The CAP must include mandatory measures, under SMRs or GAECs, requiring farmers to produce or use circular fertilisers.

In their CAP Strategic Plans, Member States must introduce additional voluntary measures under ecoschemes and rural development programs to further support the uptake of circular fertilisers.







New regulatory drivers at European level

 Revitalising the Integrated Nutrient Management Action Plan 5. Enhancing Research and Innovation in sustainable nutrient management

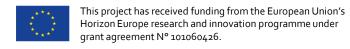
 Establishing a European Nutrients Recycling Target



Implementing fiscal tools for sustainable nutrient management

4. Considering the integration of agriculture into the EmissionsTrading System

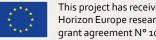




Thank you for your attention







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