



S ECONDARY NUTRIENT FLOWS IN FRANCE, A TOOL FOR INDUSTRY AND FOR FARMERS

FLORENCE NYS – General Delegate

June 5 - 2019

Circular Economy : an opportunity for Plant Nutrition Industry



unifa
Bien nourrir les plantes
pour mieux nourrir les hommes

ENGAGÉS
pour préserver l'environnement et mieux nourrir les hommes !

ABOUT UNIFA : PROFESSIONAL ORGANISATION REPRESENTING FERTILISER PRODUCERS IN FRANCE AND EUROPE

► **42** members, representing **96 %** of French fertiliser production and **78 %** of deliveries for an annual market amounting to nearly **12** million tonnes of products.

► With a mandate to represent **a family of key players in the food chain**

► Delegated by the **Ministry of Agriculture** to produce **official statistics** on fertiliser deliveries in France.

ACTORS IN FERTILISATION IN NUMBERS



FERTILISATION INDUSTRIES
Source: UNIFA

€2.1 billion €
Turnover in 2017
(sales in France and exports)



FARMERS
Sources: AGRESTE, INSEE

€71.8 billion
value of agricultural production in 2017
Up 3.3% / 2016



AGRI-FOOD
Source: ANIA

€180 billion
Turnover in 2017

4 000 
direct jobs (FTE)
and nearly 12,000
indirect jobs

50 
member companies
from SMEs to
multinationals
94 production sites

694 600
jobs in 2017

of which **417 300**
farmers
in 43,600 farms

429 079
jobs in 2017

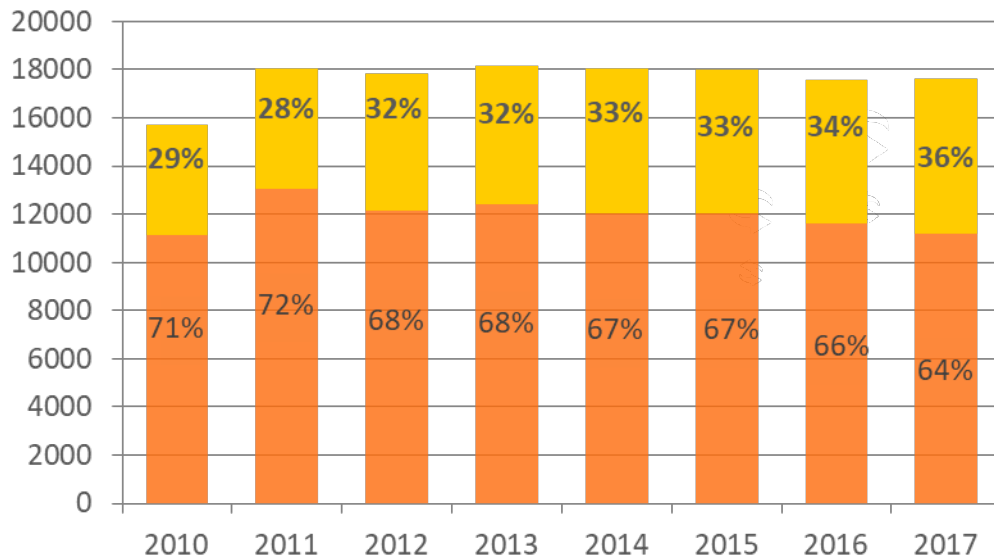
of which **17 647**
companies

ORGANIC AND MINERAL FERTILISATION OBSERVATORY

AN INCREASE IN THE PORTION OF ORGANIC PRODUCTION SINCE 2011



17.6 million tons of fertilisers and soil conditioners were sold in France in 2017.



- Organic fertilisation (organic soil conditioners, organic fertilisers)
- Mineral fertilisation (Basic mineral soil conditioners, mineral fertilisers, organo-mineral fertilisers)





MARKETED FERTILISERS AND NON-MARKETED LIVESTOCK EFFLUENTS IN 2017

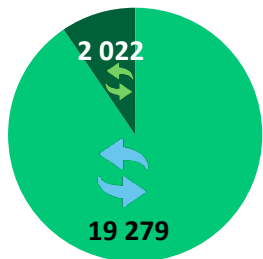


Taking into account locally applied, non-marketed livestock effluents, mineral fertilisers (in light green) contribute **73 % of the nitrogen**, **46 % of the phosphorus** and **28 % of the potassium** added to agricultural soils.

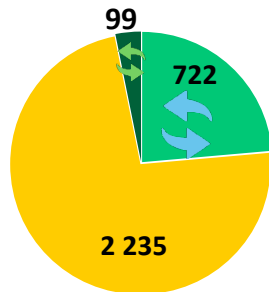


- Livestock effluents
Local development
- Marketed products
from recycling

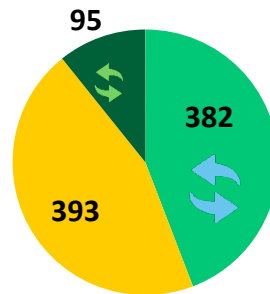
Organic Matters (MO):
21,303 Kt of MO



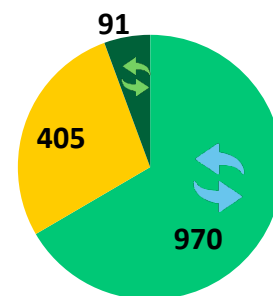
Nitrogen : 3 056 Kt



Phosphorus : 870 Kt

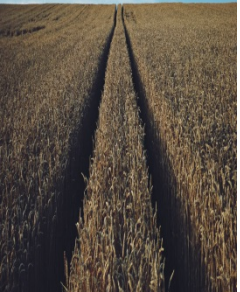


Potassium : 1 469 Kt





EUROPE AT THE TIME OF THE NEW REGULATION ON FERTILISING PRODUCTS



● A NEW REGULATION AS PART OF THE "CIRCULAR ECONOMY" PACKAGE

Aim : harmonise marketing rules; promote the movement of products within the EU

A regulation extended to all families of fertilising products : fertilisers, soil conditioners, biostimulants and growing media

Issues relating to food security and the environment with a demonstrated effectiveness on soil fertility and plant nutrition



ORGANIC FERTILISATION UNDER THE NEW EUROPEAN REGULATION ON FERTILISING PRODUCTS

● COMPLEMENTARITY OF ORIGINS

Mineral fertilisers and organic fertilisers are complementary

● THE ISSUE OF SAFETY AND AGRONOMIC PERFORMANCE

● FOSTER THE DYNAMIC DEVELOPMENT OF ORGANIC AND ORGANO-MINERAL FERTILISATION

by opening up to the common market

● PROMOTE INNOVATION with a view to sustainable development and the circular economy

● ALLOW the use of organic or mineral by-products to maintain the best practices

F RANCE AT THE TIME OF THE CIRCULAR ECONOMY LAW

● A FRENCH COMMITMENT IN CIRCULAR ECONOMY

- **July / December, 2017** : Etats Généraux de l'Alimentation
- **April, 2018** : French Prime Minister presents the **National Circular Economy roadmap**
- **February, 2019** : Presentation of the Agricultural component of the Circular Economy road map – **Priority to production of recycled fertilizers with high agricultural and sanitary quality.**



The French Circular Economy law is to be voted during autumn 2019

SECONDARY NUTRIENT FLOWS IN FRANCE, A TOOL FOR FARMERS

FRANCE IS :

- the 1st European producer of soft wheat, malt and rapeseed
- the 2nd European producer of corn and durum wheat
- the 2nd European producer of milk

FRENCH AGRICULTURE IN A FEW NUMBERS:

- 62.6 million tonnes of cereals, - 6.6 %*
- 6.6 million tonnes of oilseed and protein crops, - 3.7% *
- 40.4 million tonnes of sugar beet, + 8.8% *
- 17.20 million tonnes of silage maize, - 5.6 % *

*Yearly average over the period 2013 to 2017

- 252 million hl of milk,
- 5.5 million tonnes of meat (carcass weight equivalent)

TARGET :

15% of French agricultural land to be farmed organically in **2022**

* Source: Agreste, October 2018

S ECONDARY NUTRIENT FLOWS IN FRANCE, A TOOL FOR FARMERS

In a circular economy approach, organic fertilisers have high development potential. They are linked to mineral fertilisers for the needs of some crops.

- Each type of crop has the right fertiliser.
- A guarantee of harmlessness, without compromising on agronomic performance.
- The possibility to access innovation (e.g. : biostimulants)



A performance and competitiveness tool for French agriculture



UNIFA THANKS YOU FOR YOUR ATTENTION

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