

**soveea**



# Annual report 2025

## OUR GOVERNANCE

President  
Florence NYS

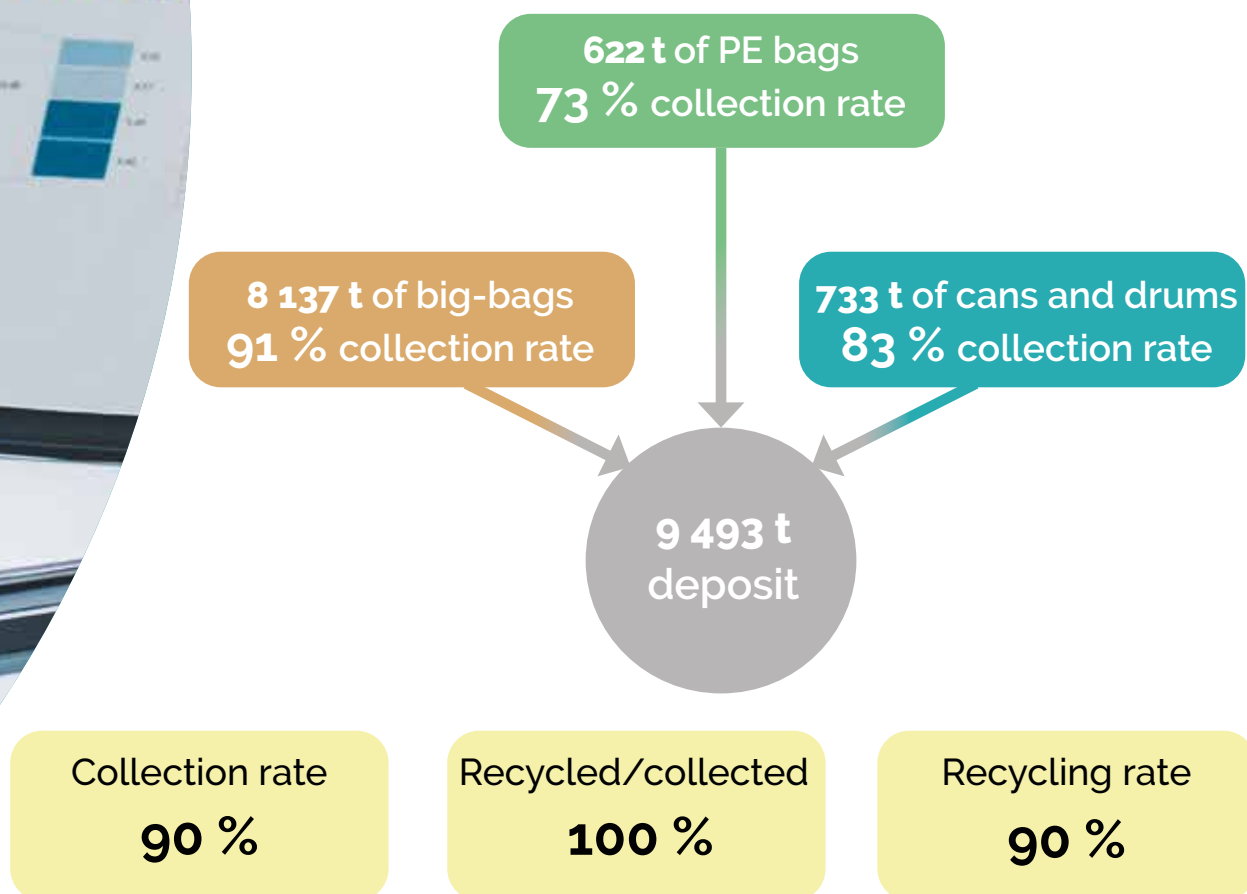
Director  
François DELTOUR

Administrator  
Michaël LEPELLEY  
YARA

Administrator  
Jacques FOURMANOIR  
TIMAC AGRO

Administrator  
Stéphanie PITTIE  
ANPEA

## EMPTY FERTILIZER PACKAGING (EFP)



\* The recycling rate corresponds to the ratio of quantities recycled to quantities marketed or quantity of deposits.



## RALLYING TOGETHER TO MEET CHALLENGES



The year 2025 will once again have illustrated Soveea's commitment to serving the entire agricultural supply sector. This progress report describes our ambitions and our collective ability to anticipate current and future changes. Progress made this year reflects the ongoing commitment of our directors, who have helped to structure, accelerate and take our actions to the highest level.

The regulatory environment is constantly changing. The recent publication of the decree establishing EPR for professional packaging illustrates this. Thanks to recognition of our industry's performance, our sector has been excluded from its scope, thus avoiding gold-plating that would have put a heavy burden on our stakeholders. This is a collective success and proof that our efforts are bearing fruit. However, we must remain vigilant and pursue our commitment alongside our partners, in particular by anticipating future developments in European regulations, particularly the **PPWR (Packaging and Packaging Waste Regulation)**.

The **Novus** industrial site, inaugurated in 2024, this year confirmed the industrial feasibility of recycling big bags in France. Although some adjustments are still required, the unit is already turning waste into a secondary resource that can be sold on the market. Novus fully embodies the circular economy dynamic that we are pursuing with determination and that we can all celebrate.

The « **MyDataforFertilizers** » tool is also fully operational. Our sector has once again demonstrated its exemplary nature : the collective is capable of coming together, tackling key subjects and being proactive in proposing innovative and effective solutions. Thanks to this shared work, the exchange of data on fertilisers is becoming simpler, smoother and more transparent.

**Soveea** continues to carry out its duties in full. Our objective is clear : support our members in preparing for and anticipating future regulations. Let's continue to build together, with pride and determination, convinced that our joint efforts will advance the entire industry.

Florence NYS, President

François DELTOUR, Director



## My Data for Fertilizers : rolling out the tool

In 2024, under the impetus of Soveea, the sector reached a new milestone with the rollout of « **My Data for Fertilizers** », a shared digital solution to facilitate and optimise the sharing of data on fertilizers. From the launch phase, the tool attracted interest from distributors, manufacturers and marketers. In 2025, the tool underwent significant developments to improve and enrich the user experience. At the same time, communication has helped to promote the tool to as many people as possible. The objective remains the same : to encourage all those involved in the sector to adopt the tool in order to manage data collectively in a structured and transparent manner.

### A smoother and more efficient version

« **My Data for Fertilizers** » is an innovative management system that includes a database in which professionals can enter and share the technical and regulatory characteristics of their fertilizer products with their customers. The solution simplifies, secures and improves the reliability of product information exchanges. Around 20 organisations (purchasing centres and market operators) have already adopted the « **My Data for Fertilizers** », solution, thus validating its relevance and interest for the sector.

In 2025, several improvements made the user experience more dynamic :

- Optimisation of product catalogues, revision of data and addition of tooltips for more intuitive navigation.
- Easier access to documentation, FAQs and the updated list of member companies.
- Sending grouped notifications to inform distributors of any changes, updates, additions or deletions to product listings.
- Adjustments were made to lift certain barriers to use.
- Provision of a new tool : « **standardised Excel file** » to facilitate the creation of Product Sheets.
- Provision of product reference coding valid only for data exchange within « **My Data for Fertilizers** ».
- **A free, three-month trial offer** with no obligation is offered to test the tool.

By strengthening the tool's ergonomics and removing certain barriers, adoption of the tool is quicker and easier, encouraging all professionals to use « **My Data for Fertilizers** ». Note also that this solution has been opened to green space professionals.

### Communicating to gain support

In 2025, communication efforts promoted « **My Data for Fertilizers** » to the widest possible audience. Targeted actions on social media and in the trade press, webinars and press breakfasts at the International Agricultural Show, presence at Comifer and at Unifa's General Meeting : these were just some of the events and actions to raise awareness about « **My Data for Fertilizers** ».

In addition, a strategic project on product sheets life cycle management began in 2025 and will be finalised in 2026. This process should enable the end-of-life management of references to ensure that users receive reliable information. Thus, depending on regulatory or commercial discontinuation dates, product sheets may change from visible status to end-of-life status, where applicable.

For 2026, communication will be stepped up to expand deployment of « **My Data for Fertilizers** ». The long-term aim is still for all professionals to adopt this collaborative solution. Even in the absence of regulatory requirements, sharing and harmonising product catalogue data provides a solid foundation that is essential for digitisation and information management for the agricultural supply chain. Thanks to « **My Data for Fertilizers** », there is no need to exchange incomplete records and multiple e-mails each time a new piece of information is released because everything is **centralised** and **harmonised** in a **simple and effective tool**.

## Novus : an ambition turned into reality

Thanks to **Novus**, the French agricultural packaging and recycling sector has written a new chapter. Since 2019, the sector has aimed to relocate the recycling of big bags to France. In spring 2024, this ambition became a reality : **Novus** was born, and the first big bag recycling plant in France was inaugurated in Normandy. It got off to a promising start, although a few technical aspects still need to be optimised.

Following the necessary start-up phase, since November 2024 **Novus** has been producing **rPolyFlex**, granules, a mix of polypropylene (PP) and polyethylene (PE), certified RecyClass and made entirely from used big bags. This product is in regular demand and its quality is appreciated. It positions **Novus** in the value chain and confirms the industrial feasibility of a recycled compound made exclusively from big bags. Around **1,800 tonnes of big bags** have been processed to produce **1,500 tonnes of granules**. The initial procedure has, however, revealed its limitations, in particularly rapid wear and tear of the shredding machines. The sorting rates also need to be increased, which led to the line being shut down in autumn 2025. It will be operational again by the end of the year, with a system combining mechanical shredding and optical separation. From 2026, the aim is to produce three types of products : **rPolyFlex**, a fraction of PP and another of PE.

The homogeneity of the big bags collected, which enter the process, ensures a relatively consistent product quality at the output stage. However, the presence of disruptors remains and hinders the recycling process. These include elements not made of PP or PE (staples, polyamide), solvent-based printing, labels, adhesives and the presence of RFID chips.

In addition to improving and optimising the process, it is important to inform all big bag marketers that there is an industrial facility in France capable of supply high-quality recycled material. **Novus** fully embodies eco-design, with each big bag being made into a valuable product. The market can turn the page on waste and now focus on promising new resources.

## Eco-modulation : new avenues for promoting eco-design and circularity

Major developments in eco-modulation are expected by 2026, with an emphasis on the incorporation of recycled raw materials.

Since 2023, **Soveea** has implemented a bonus/penalty system – called **eco-modulation** – aimed at encouraging recycling and promoting material circularity. The principle is simple : a bonus reduces the eco-contribution for eco-designed products, while a penalty increases it for products that are more polluting or difficult to recycle.

After two years of application, this over-simplified approach has shown its limitations. The current measures do not provide sufficient incentive to bring about fundamental changes in practices. Also, on an operational level, those responsible for reporting are often far removed from the purchasers of big bags and therefore have little influence over their choices.

As part of the « **Eco-design WG** » working group, **Soveea** and its partners are now exploring new avenues to make incentives more effective.

A penalty could, for example, be imposed on big bags containing one or more recycling disruptors. Conversely, bonuses could promote the origin and use of recycled materials, **with specific thresholds for incorporation rates above 30%**.

The working group is also considering expanding the list of disruptors, which is currently limited to the presence of staples or polyamide. New criteria could be included : dyeing the fabric, presence of solvent-based inks, or aluminium in certain RFID chips. The aim would be to implement a cumulative effect based on the number of disruptors identified, with **penalties up to 40%**.

All of these avenues will need to be tested against the realities on the ground. But one objective remains : enable **Soveea** to prepare for future regulations, to support members in changing their practices and, above all, strongly encourage the incorporation of recycled plastic.

## Agricultural supply : exclusions and outlook for 2026

The decree establishing Extended Producer Responsibility (EPR) for commercial packaging was published in the Official Journal on 17 November 2025, confirming its implementation on 1 January 2026.

However, the decree specifying the scope, which was put to public consultation in autumn 2024, excludes the agricultural supply sector to avoid gold-plating. The agricultural supply sector, which is already operational, is recognised for its performance with a **71% collection rate** and **90% recycling rate of the quantities collected**, while the PRO packaging EPR targets a **collection rate of 55%**. Furthermore, the agricultural supply EPR involves farmers, distributors and manufacturers, with no additional costs for farmers, unlike the PRO Packaging EPR, which will leave additional costs, particularly for hazardous waste packaging. Finally, the agricultural supply EPR is already working on eco-design and collaborating with recyclers.

### Standardised and strengthened data transfer

In accordance with the European **PPWR (Packaging and Packaging Waste Regulation)** and the Environmental Code, all companies will be required to submit their 2026 marketing data on packaging to a national register in early 2027 : number of units, composition, weight and data regarding reuse.

The Syderep system by ADEME should serve as this national register. Data transfer should be carried out by the « management structure/Adivalor » ecosystem on behalf of producers (= marketers in EPR sectors). As the agricultural supply ecosystem has a two-tier management structure with Soveea and Adivalor, discussions are taking place to determine who will act as the interface for the reporting of secondary and tertiary packaging (transport packaging).

It should also be noted that in France, an eco-modulation scheme with an **IMR (Integrated Recycled Material) premium of €450/tonne** has been introduced for several EPR sectors, but its application to the agricultural supply sector remains to be clarified, as this sector already has an eco-modulation scheme supporting the competitiveness of recycled agricultural plastic.

### Looking to 2030

The European PPWR regulation aims to make all packaging reusable or recyclable by 2030. Packaging will be considered recyclable if **at least 70% of it is designed to be recycled**. In addition, in 2030 there will be requirements to incorporate recycled plastic materials depending on the type of packaging, specifically **a minimum of 35% for professional plastic packaging**. There are exemptions from the requirements, both in terms of recyclability and integration ; these mainly concern packaging that has contained hazardous products and packaging in which plastic accounts for less than **5% of the weight**.

The regulation also sets very ambitious reuse targets for transport and sales packaging used for transport. While these targets seem extremely difficult to achieve for bags, cardboard boxes and packaging that has contained hazardous products, they appear even more challenging for flexible packaging. Soveea, Adivalor and stakeholders in the sector are therefore working to obtain exemptions related to the specific characteristics of agricultural supply packaging in order to help stakeholders to be operational with respect to the regulation.



# 191 Eco-Contributors

participate in the collection and recycling of empty fertilizer and soil amendment packaging.

AGRALIA SAS	CR DISTRIBUTION SAS	INNOVAFEED	SAS LB
ACTEO SAS	CYBELE-AGROCARE	INOXA	SAS SYMBIOSE
AGRAUXINE BY LESAFFRE	DEFEDER	INTERFERT	SCAM S.C
AGRI OPTIM	DIETAXION SAS	INTERORE SA	SCAR
AGRI SYMBIOSE	DIJON CÉRÉALES	IRIBARREN SA	SCIC GUADELOUPE AGRI SAS
AGRIAL	DUMESNIL	J.L.C	SCIC MARTINIQUE SAS
AGRICELLS	DUROURE .12	JEUSSELIN SAS	SCL ITALIA S.P.A.
AGRICONOMIE	DUROURE .7	K+S FRANCE	SDP
AGRIFERT	DYNAFLOR	KONIPHER SAS	SEPAC
AGRIMER - AGROCEAN	ED&F MAN LIQUID	KOPPERT FRANCE SARL	SOBAC
AGRISYNERGIE SARL	PRODUCTS ITALIA SRL	LA GRANDE JAUGUE	SOIL TECH SOLUTIONS BV
AGRODIA SA	EFIKA	LABORATOIRE SOLUTIO	SOUFFLET AGRICULTURE SAS
AGROFERTIL SARL	ELIARD - SPCP	LALLEMAND SAS	SUD ENGRAIS DISTRIBUTION
AGROINDUSTRIAL KIMITEC	ELICIT PLANT	LAT NITROGEN AUSTRIA GMBH	SUMI AGRO FRANCE
AGRONUTRITION	EMC2	LAUTIER & CIE	SYNGENTA FRANCE SA
ALINTRA S.A.U	ENGRAIS DROUIN SAS	LEPICARD AGRICULTURE	TERIALIS
AMALTIS	ENGRAIS PASSERON SARL	LHOIST FRANCE OUEST	TERNOVEO
ANGIBAUD DÉROME & SPÉCIALITÉS	ENGRAIS SUD VIENNE	LITFERT	TERRE COMTOISE
APPRO-VERT	ESTAGRI	LONGUEIL (CIE DES ENGRAIS DE)	TERRENA
AQUITILIA	EURALIS CÉRÉALES	LORCA	TERRES BOCAGE GÂTINAIS
ARMBRUSTER GRANDES CULTURES SAS	EUREA DISTRIBUTION	LOUSSERT ORGANIQUES	TERRES DU SUD
ARMBRUSTER VIGNES SARL	EUREDEN	MAÏSADOUR	TERRIAL
ARTERRIS - ALLIANCE OCCITANE	EUROCHEM AGRO FRANCE	MÉTHODE COUSINIÉ SARL	TESSENDERLO KERLEY INTERNATIONAL
AXEREAL	FCA FERTILISANTS	MULTIFOLIA SAS	THIÉLIN CULTURE
AXIOMA BIOLOGICALS	FERTEMIS	NATUP	TIMAB MAGNESIUM
AXONE	FERTEX MANAGEMENT COMMT	NOVAEM BBTRADE	TIMAC AGRO
BAYER SAS	FERTIBAT APPRO SA	NUFARM	TMCE (TECHNIQUE MINÉRALE CULTURE ET ÉLEVAGE)
BELOT FILS ETS	FERTIBERIA FRANCE SAS	NUTRIEN FRANCE	TONYX
BERNARD AGRICULTURE	FERTILORE SOURCING	OCÉALIA	TOOPI
BHS	FERTINAGRO	OCI AGRO FRANCE	TRADE CORPORATION INTERNATIONAL, SAU
BIO 3G	FERTIVAL FRANCE SAS	OLMIX	TRIFERTO BELGIUM NV
BIODEVAS LABORATOIRES	FIBRANT	OMAG SUD AGRO-PERRET	UCAL
BITZ	FRANCE OLIGO	ORGA DR	UNEAL
BLUE AGRO SAS	FRAYSSINET SAS	OVINALP FERTILISATION	UNIFERT FRANCE
BMS MICRO NUTRITIENS FRANCE SAS	GAIAGO	PENN AR BED SAS	UNION INVIVO S041 - FERTILINE
CAPL	GEFI SAS	PLANTIN	UPL FRANCE
CAVAC	GETADE ENVIRONNEMENT	PRODUCTOS LABIN, SL.	VAL DE GASCOGNE
CERESIA	GIROUX SASWGREENCELL SA	PROVENÇALE	VALFRANCE
CHARPENTIER SA	GROUPE MEAC SAS	PUREFERT FRANCE SAS	VAN IPEREN INTERNATIONAL
CHAUX SAINT PIERRE SNC PIGEON & Cie	GROUPE OXYANE	QUALIFERT	VEGELIA
COMPO EXPERT FRANCE SAS	GUYON	RAGT - PLATEAU CENTRAL	VERAGROW
COMPTOIR AGRICOLE	H.M.W.C	RHÔNE SAÔNE ENGRAIS	VERTALYSE
COOPÉRATIVE AGRICOLE INTERVAL	HAIFA FRANCE	RHÔNE-ALPES AMENDEMENTS	VIA VÉGÉTALE
COOPÉRATIVE BOURGOGNE DU SUD	HELLO NATURE FRANCE	ROSIER	VIOLLEAU SAS
COOPÉRATIVE DE CREULLY	HEXAGON FRANCE	SAFA	VITIVISTA
	HEXAGRI	SANI	VIVESCIA
	HUON ETS	SARL DE L'AVRESNE	VOET ENGRAIS
	ICL EUROPE COOPERATIEF UA	SARL SOCOFERT	YARA FRANCE
	ICL FRANCE SPÉCIALITÉS		
	IMPACT PRO		

## Contact

François DELTOUR

06 87 76 52 35  
frdeltour@soveea.fr

14, rue de la République  
92800 Puteaux

## Mailing address

Le Diamant A  
92909 La Défense cedex  
France

[www.soveea.fr](http://www.soveea.fr)



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