POLICY BRIEF

Growing Media

Towards an EU Policy Framework Fit for Purpose

Based on the Brussels Policy Scoping Workshop — 3 March 2026

Overview and Purpose

The Brussels Policy Scoping Workshop of the 3rd of March 2026 was organized by the SPINFERT and Hort2theFuture Horizon Europe projects funded under the Mission 'A Soil Deal for Europe'. It brought together EU policymakers, industry stakeholders, and academic partners to identify shared research outcomes and align them with EU policy needs. This Brief synthesises the key findings and policy-relevant messages arising from the workshop relating to growing media, while recognising that not every partner of each project may endorse all conclusions.

The European growing media industry generates at least €3 billion in turnover per annum and underpins a much larger horticultural sector (Growing Media Europe). Global demand for growing media is substantial (116 Mm^3) and projected to increase sharply (by over 250% by 2050), driven by population growth, climate pressures, and expansion of soilless and controlled-environment agriculture (Nguyen et al., 2026). Meeting this demand sustainably requires urgent policy action to scale up high-quality and sustainable alternatives to peat, remove regulatory barriers to innovation, and strengthen collaboration between policymakers, industry and research communities.

1. Background and Context

Growing media (materials other than in-ground soil), which are used to grow plants in controlled environments, are a strategic input for European and global horticulture. They enable higher yields with reduced inputs of water, fertiliser, pesticides, and land, while improving plant health and resilience (Blok et al., 2021; Zhou et al., 2021).

Currently horticultural peat accounts for just over half of the materials used in growing media globally, with other key ingredients being bark (15%), coir (9%), compost (8%), mineral wool (6%) and wood fibre (5%) (Nguyen et al., 2026) . To meet demand, there is a need to scale up the availability of alternatives to peat, and further improve their effectiveness, and to not put additional restrictions on existing materials (including peat). Currently, peat remains a dominant component due to its consistent physical, chemical, and phytosanitary properties, availability, consistency, long-established use, and ability to enable blends with alternative materials.

2. Key Policy Issues

2.1 Regulatory barriers: The Fertilising Products Regulation

A central concern raised at the workshop is that the EU Fertilising Products Regulation (FPR), despite specifically including growing media as major Product Function Category (PFC), is poorly adapted to the sector, creating disproportionate administrative burdens, limiting market

access and hindering innovation despite the sector's demonstrably low-risk profile. Specific challenges include:

- Lack of certainty of product function category suited to growing media blends.
- Regulatory requirements designed for soil fertilisers that do not translate appropriately to soilless growing systems.
- Barriers to market access for novel materials.

The FPR should be reviewed and adapted to reflect the distinct nature and low-risk profile of growing media. Fit-for-purpose regulation is a prerequisite for enabling innovation and market access for the development of innovative growing media

2.2 Raw material availability and supply chain resilience

There is evidence that growing media prices have risen in recent years (Hirschler & Osterburg, 2025) driven by increasing global demand, material shortages (e.g. peat and coir), and trade disruptions. The workshop presentation of a Digital Production Planning & Policy Simulation Tool, developed by Arijit De of the University of Manchester, underscored the importance of modelling grower responses to input price changes. The tool models horticultural growers' production decisions, profits, carbon footprint and other KPIs. It can be used by policy makers and industry actors for simulating the likely financial and environmental effects of changes in growing media and other input prices, giving insights into grower resilience. Key concerns include:

- Interactions between growing media and the quality of horticultural produce (with incomes very sensitive to whether outputs are Class 1 or Class 2
- Vulnerability of growers' incomes to extreme weather
- Ensuring that changes in the source of growing media do not compromise food security

2.3 Biowaste, compost and the circular economy

Biowaste, which makes up to 60% of municipal waste, is critical to meeting the EU target of recycling 65% of municipal waste by 2035 and achieving climate neutrality by 2050, provided that separate collection becomes mandatory and widespread across Member States.

Vlaco, which leads Hort2thefuture's work on new organic fertilising products, argues that EU-wide quality assurance and end-of-waste criteria (notably through the EU Fertilising Products Regulation and the European Compost Network's Quality Assurance Scheme) are a precondition for placing compost and digestate on the single market safely.

By embedding audits, sampling, and analysis into regulation, high-quality compost and digestate can support soil health, carbon sequestration, and nutrient management while protecting the environment and building trust in circular bio-based products.

Meeting the EU target of recycling 65% of municipal waste by 2035 and achieving climate neutrality by 2050 requires mandatory biowaste collection and robust EU-level quality standards for compost and digestate in growing media applications.

2.3 Responsible choice expansion

Industry partners, and most notably PINDSTRUP, cautioned against a ban on peat, which they argued would compromise food security. The workshop highlighted the importance of *choice expansion* – increasing the availability and effectiveness of peat alternatives, to meet the increasing global demand for growing media. Key messages include:

- Peat reduction should be performance-led and evidence-based, not prescriptive or arbitrary in timeline.
- Investment in wood fibre-based peat free and peat-reduced substrates should be expanded.
- Field trial data from Hort2theFuture and SPINFERT should inform the evidence base for regulatory transition timelines.

3. Policy Recommendations

Based on the workshop discussions, the following policy recommendations are directed to the European Commission, Member State competent authorities, and relevant stakeholders:

Recommendation	Action
R1: Adapt the FPR	Introduce appropriate and operational growing-media-specific product categories and component material categories into the Fertilising Products Regulation to reduce administrative burden and enable market access for innovative growing media.
R2: Secure raw material access	Put together an evidence base for growing media that maps supply risks, contributing to the development of industry strategies that support the production of sustainable substrates within the EU and supports the upscaling of alternatives to peat (addressing the growing global demand for growing media)
R3: Mandatory biowaste collection	Ensure that the revision of the Waste Framework Directive mandates separate collection of biowaste across all Member States, enabling a reliable supply of high-quality and sustainable compost and digestate.
R4: Harmonise quality standards	Adopt EU-wide end-of-waste criteria and quality assurance standards for compost and digestate used in growing media, building on the European Compost Network's existing scheme.
R5: Evidence-based growing media policy	Base growing media policy on scientific evidence from field trials — including data from SPINFERT and Hort2theFuture
R6: Foster stakeholder dialogue	Establish a multi-stakeholder platform bringing together policymakers, growers, manufacturers, and researchers to track implementation, share innovation and adapt policy as the evidence base evolves.

4. Looking Ahead

A key forthcoming opportunity for translating research into policy is the 2027 FAO-Hort2theFuture Policy Summit, to be hosted at the Faculty of Economics, University of Belgrade. Jointly organised with FAO, the summit will focus on measures to

increase the availability and effectiveness of alternatives to peat as a component of growing media.

The summit will adopt the Behavioural Change Wheel framework (Michie et al., 2011) to structure discussions, moving from evidence synthesis to actionable policy recommendations. European Commission officials will be invited, alongside SPINFERT project partners and a broad range of industry and civil society stakeholders.

The 2027 Policy Summit represents a concrete pathway for Mission Soil and Horizon Europe project outcomes to inform FAO and EU policy. Early engagement of DG AGRI and other EC directorates is strongly encouraged.

References

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About the Projects

SPINFERT

A Horizon Europe project funded under the Mission Soil investigating novel biostimulants and sustainable fertiliser strategies to reduce chemical inputs and improve plant nutrition efficiency in European horticulture.

Hort2theFuture

A Horizon Europe project funded under the Mission Soil focused on developing and validating sustainable alternatives to peat-based growing media for horticulture, integrating digital tools, life-cycle analysis and policy engagement.

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This Policy Brief was prepared following the Brussels Policy Scoping Workshop of 3 March 2026. It reflects discussions among project teams, industry stakeholders, and policy representatives and does not constitute an official position of the European Commission.