European Commission

Towards a

Protein Plan for Europe

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Agriculture and Rural Development

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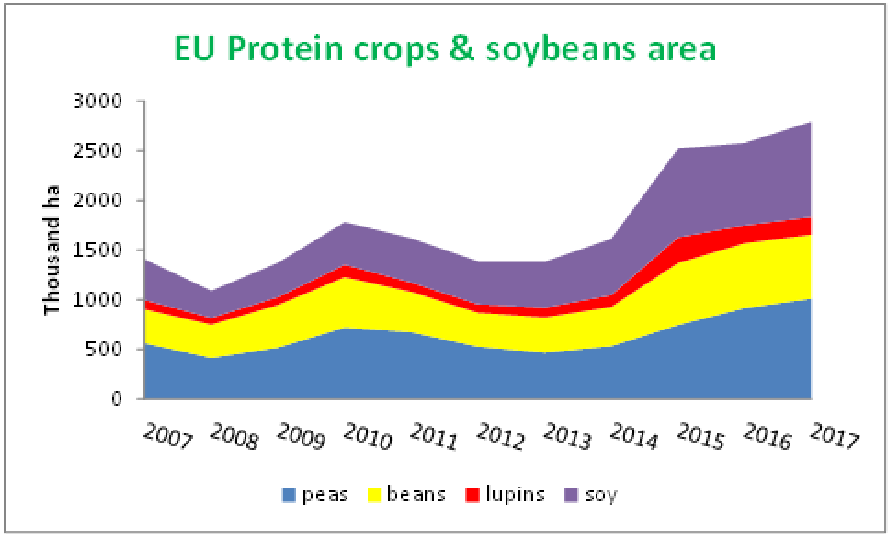
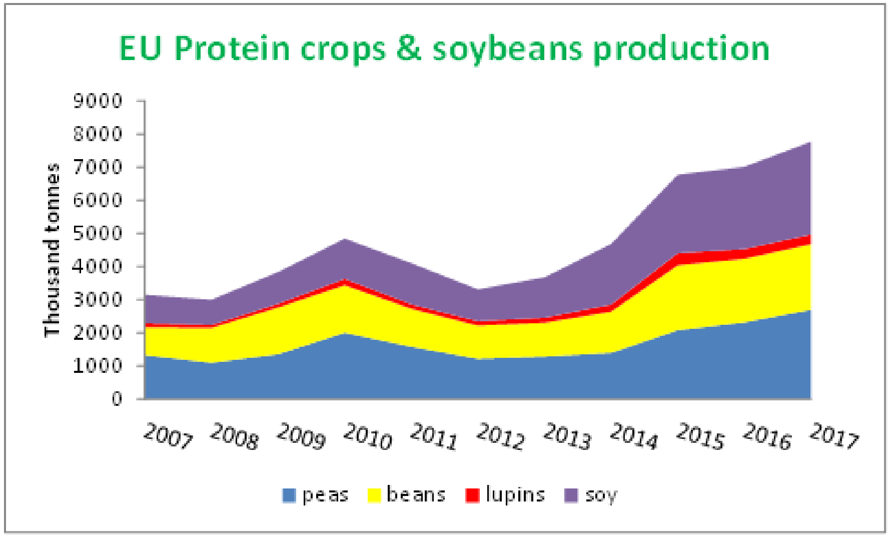
Context: a lot of interest

- Various requests from **stakeholders** on "plant proteins" (e.g. FEFAC Conference June 2017)
- **Council:** discussions on plant proteins at Council level mid-2017 on **"Soya Declaration"** + February 2018 about work programme for the EU protein plan **– broad support from Member States for EU protein plan**
- **European Parliament:** April 2018 adoption of initiative report (MEP Denanot) on a **"European strategy for the promotion of protein crops"**
- **European Commission:** preparation of **"Protein Plan for Europe"** to be published as Commission Report end 2018
- Austria (as **EU Presidency**) will host EU conference on Plant Proteins on 22/23 November 2018

Context: EU protein crops and EU soya Production on the rise

Area/production more than doubled since 2013
EU protein crops (peas, beans, lupins): 5 Mio tonnes
EU soya: 2.8 Mio tonnes





Context: still a major EU Protein Deficit

A **relevant example: soya** ≈1/3 of total feed protein supply (15 million tonnes of crude protein)

Soya bean imports (duty-free): ≈14 million tonnes

Soya meal imports (duty-free): ≈19 million tonnes of meals i.e. equivalent to ≈ 28 million tonnes of soya beans

Total soya imports ≈42 million tonnes
(soya beans equivalent)

EU soya bean production: <3 million tonnes

Soya: EU self-sufficiency ≈5%

Scope: various sources of plant proteins

- **Soya & soya meal**
- **Other Oilseeds & meals** (e.g. colza & sunflower)
- **Dry Pulses** (e.g. beans, peas, chickpeas, lentils)
- **Fodder legumes** (e.g. alfalfa)
- (Cereals and by-products)

Actions towards the EU Protein Plan

1. **Q1+Q2-2018:** fact-finding phase through
    1. Stakeholders survey
    2. Market Study
    3. Thematic workshops
    4. Bilateral meetings

2. **Q3-2018:** preparation of draft Commission report based on outcome of fact-finding phase

3. **Q4-2018:**
    - publication of Commission report on "Protein Plan for Europe"
    - High-level EU conference on plant proteins in Austria

Preliminary results - Stakeholder Survey

Launched on same day as Council meeting (19th February)

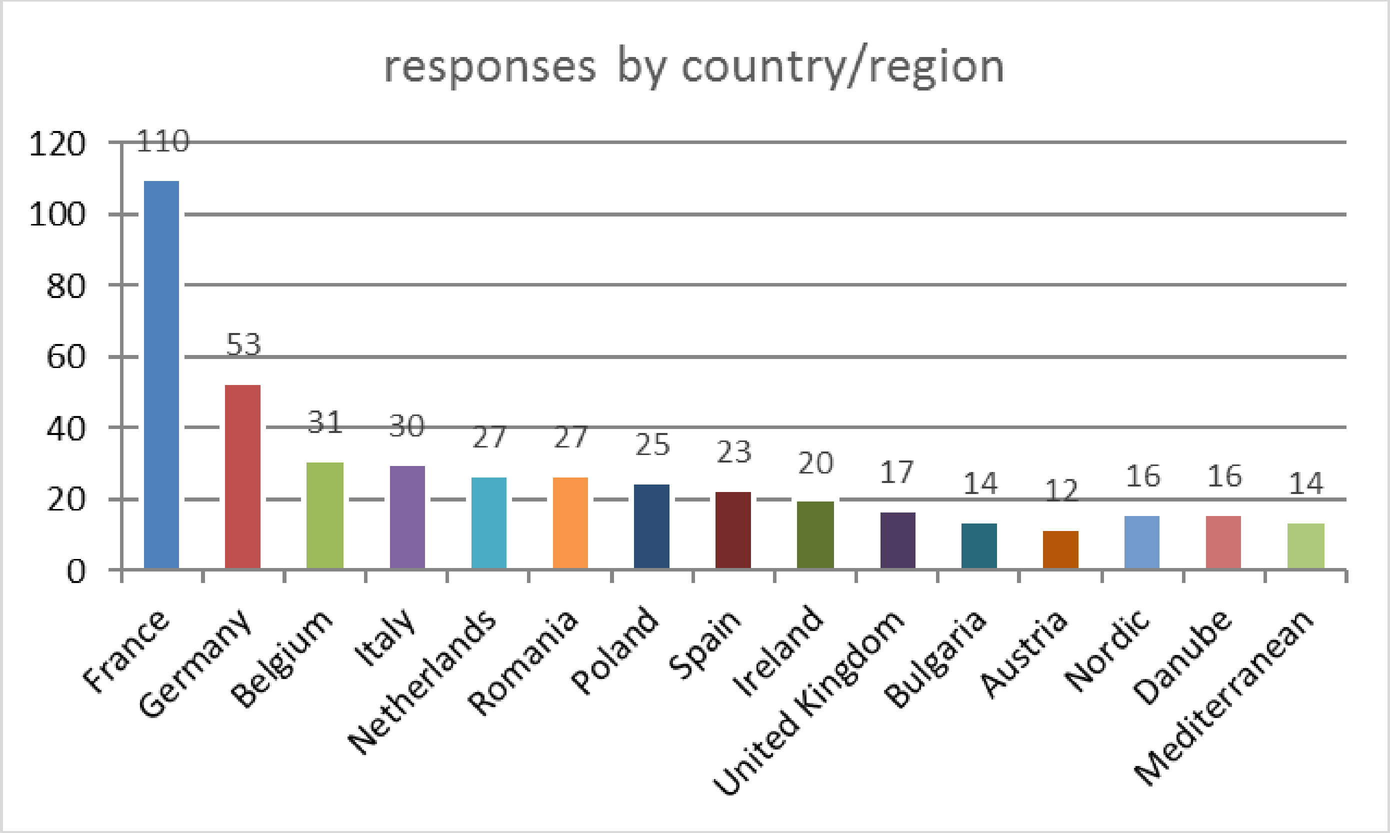
Total of 15 questions on plant proteins addressing scope, policy, markets, research

Communicated through e-mail notification to 300 stakeholders and announced on DG Agri website

In total 444 responses

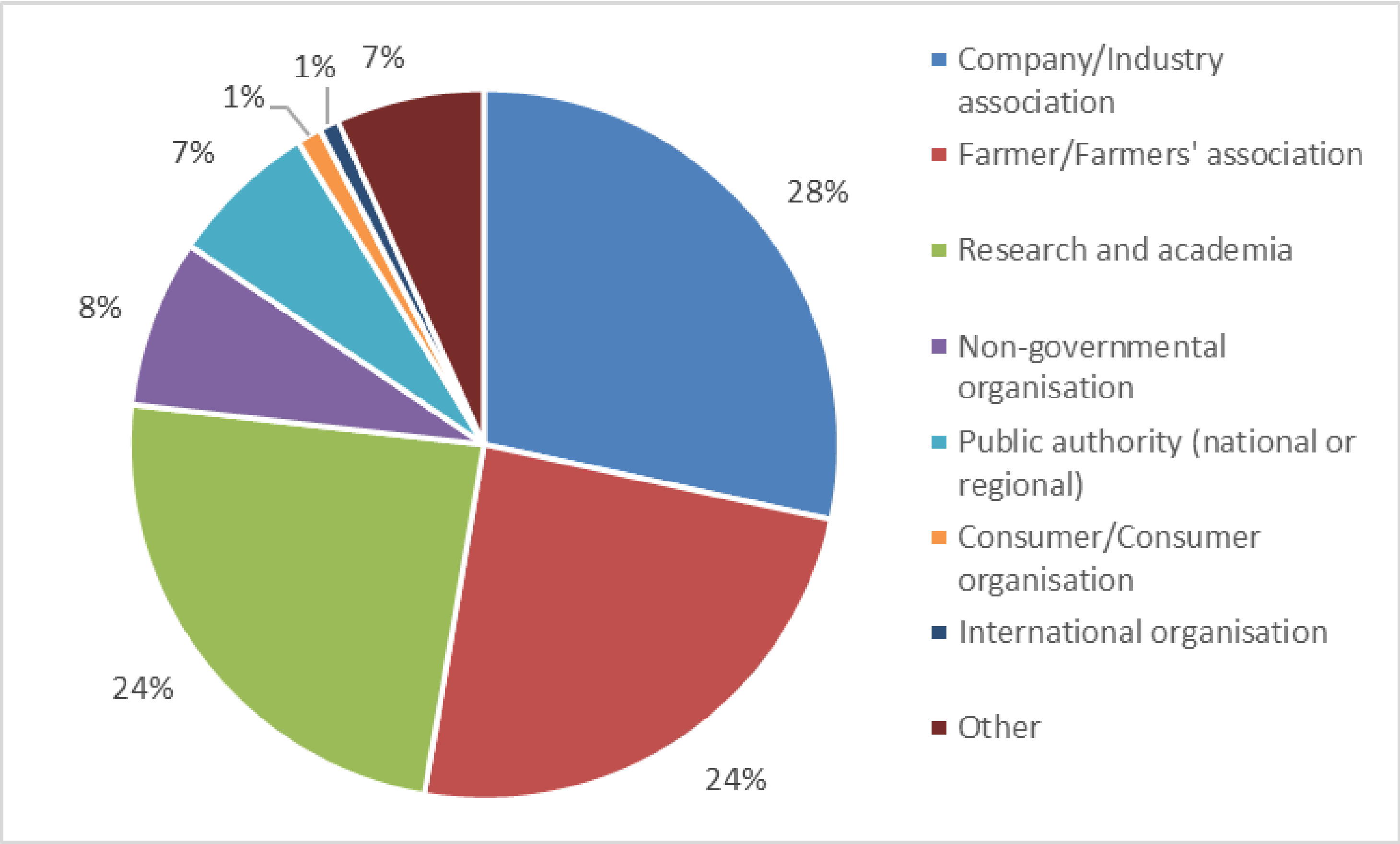
Responses by Geographical Origin

Responses from 26 MS
Most responses from France and Germany

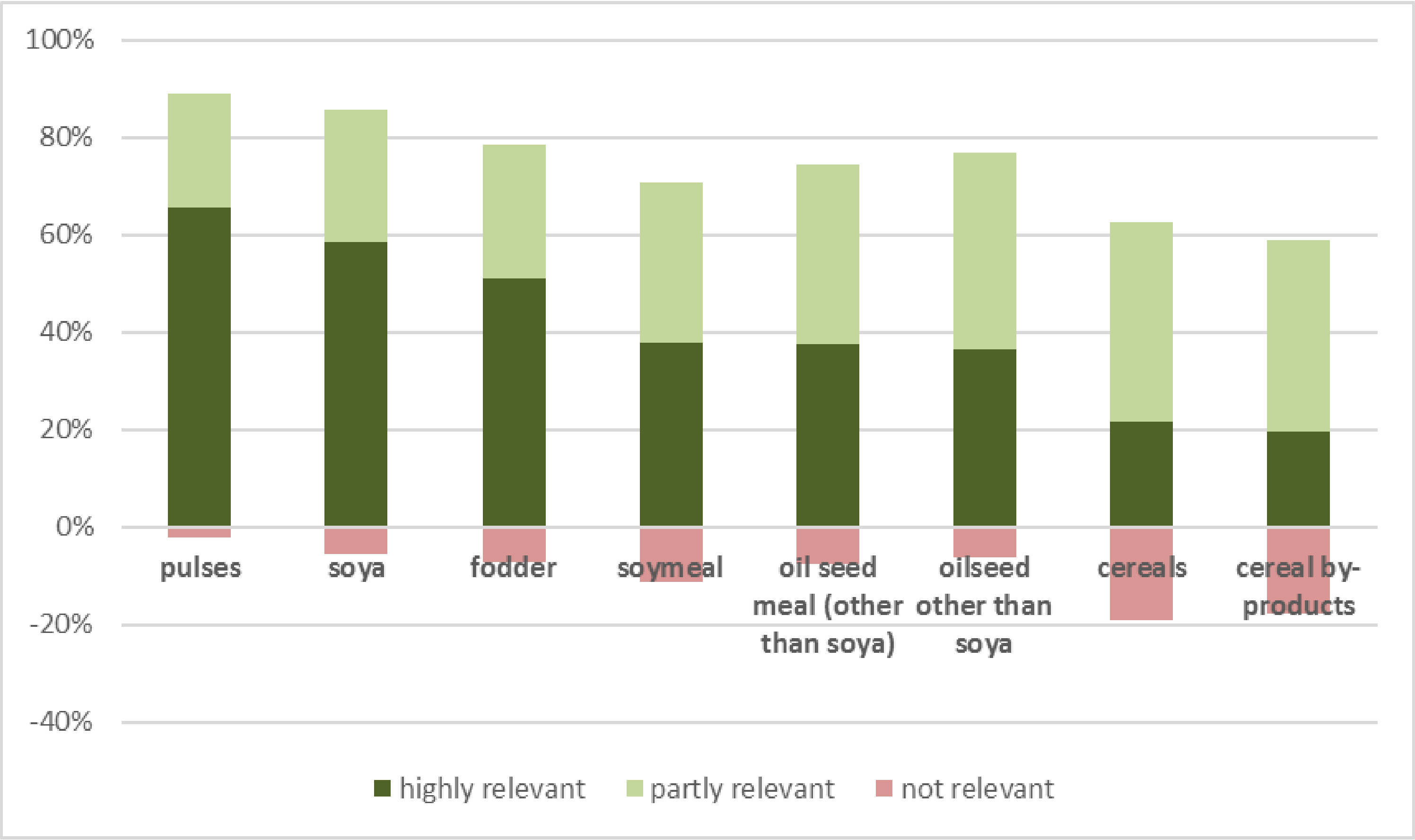


Responses by type of organisation

75% by companies, farmers and research

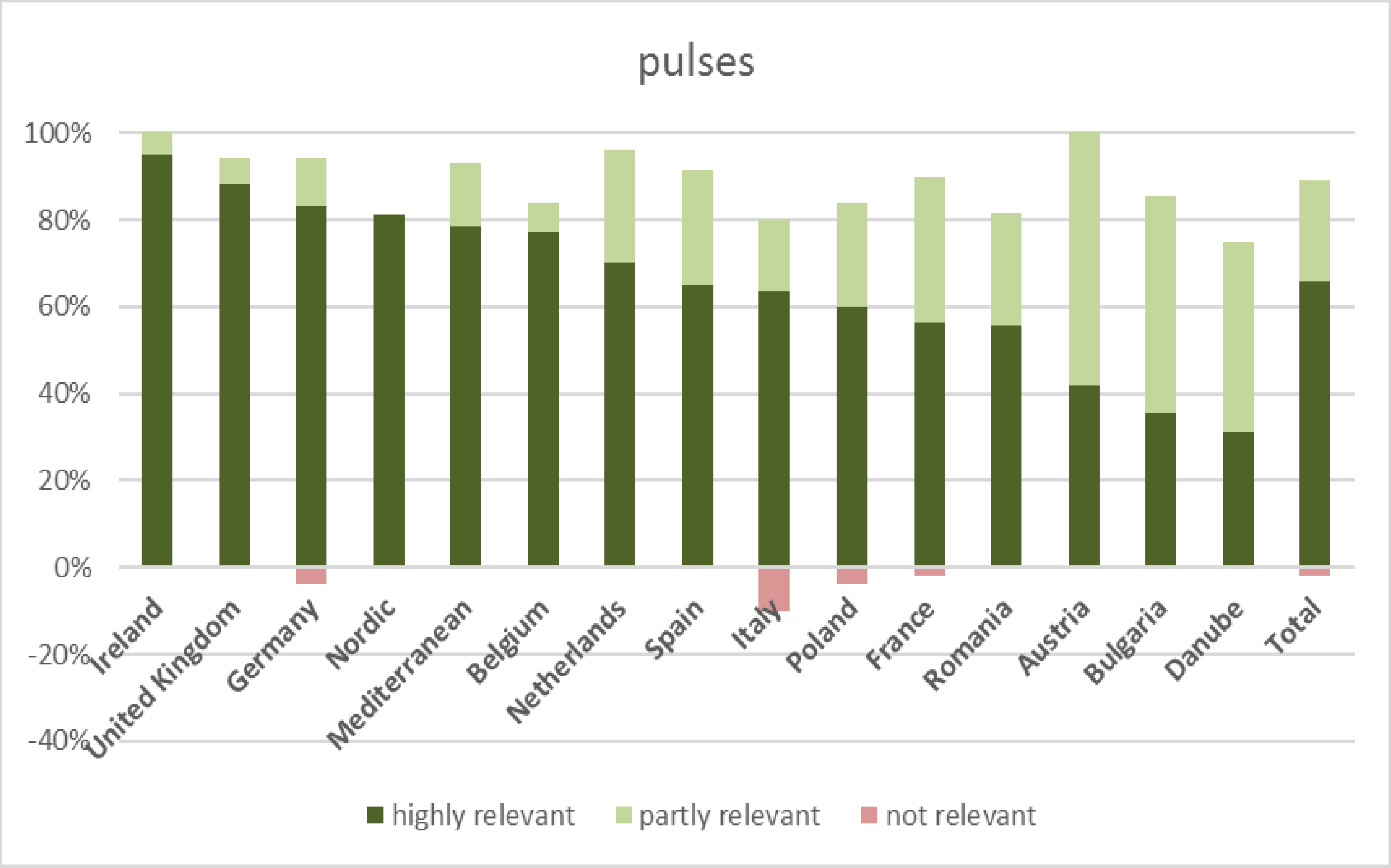


Sources of plant proteins
Soya, pulses and fodder most relevant

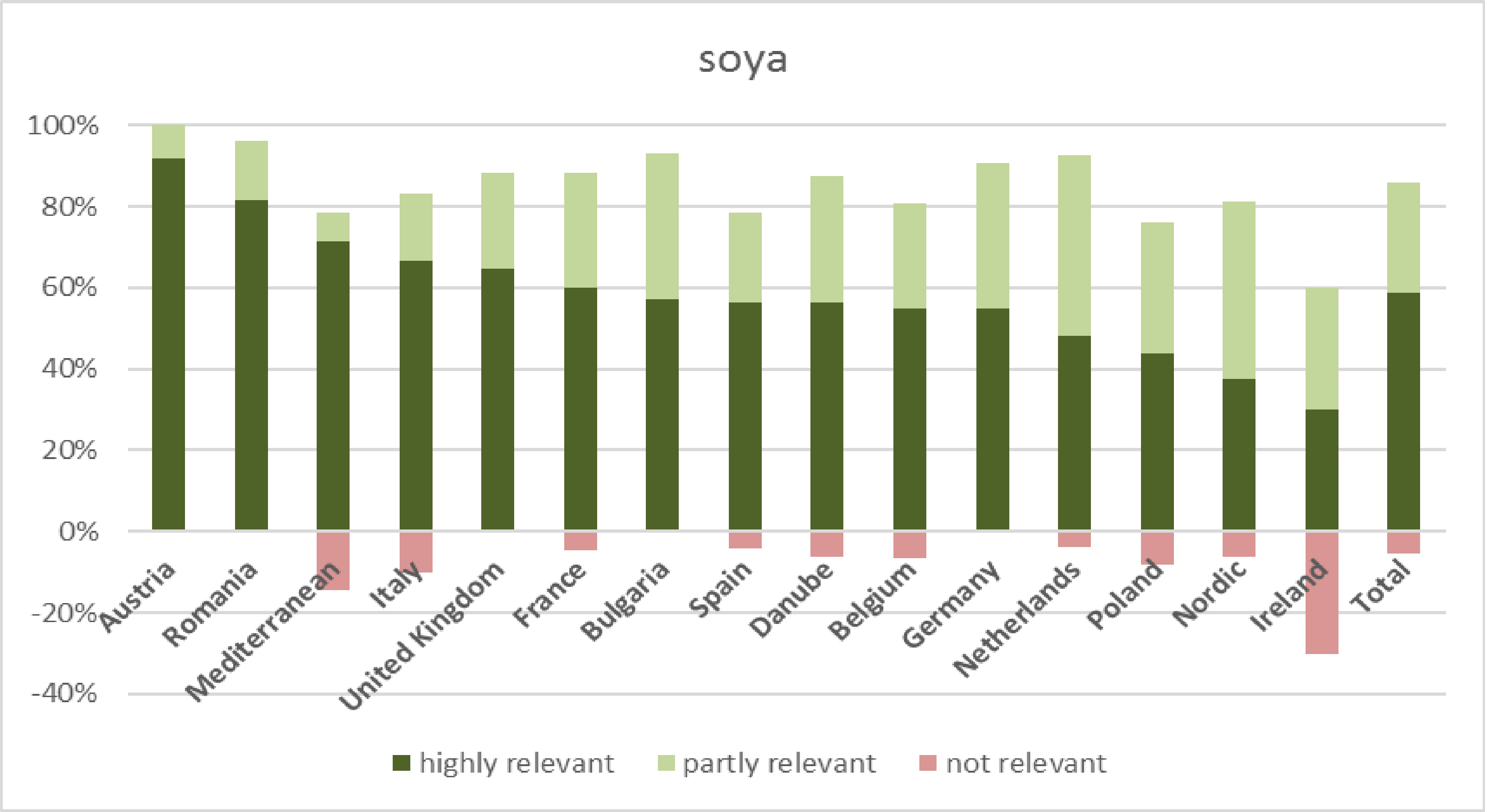


Pulses

Northwest EU and Mediterranean

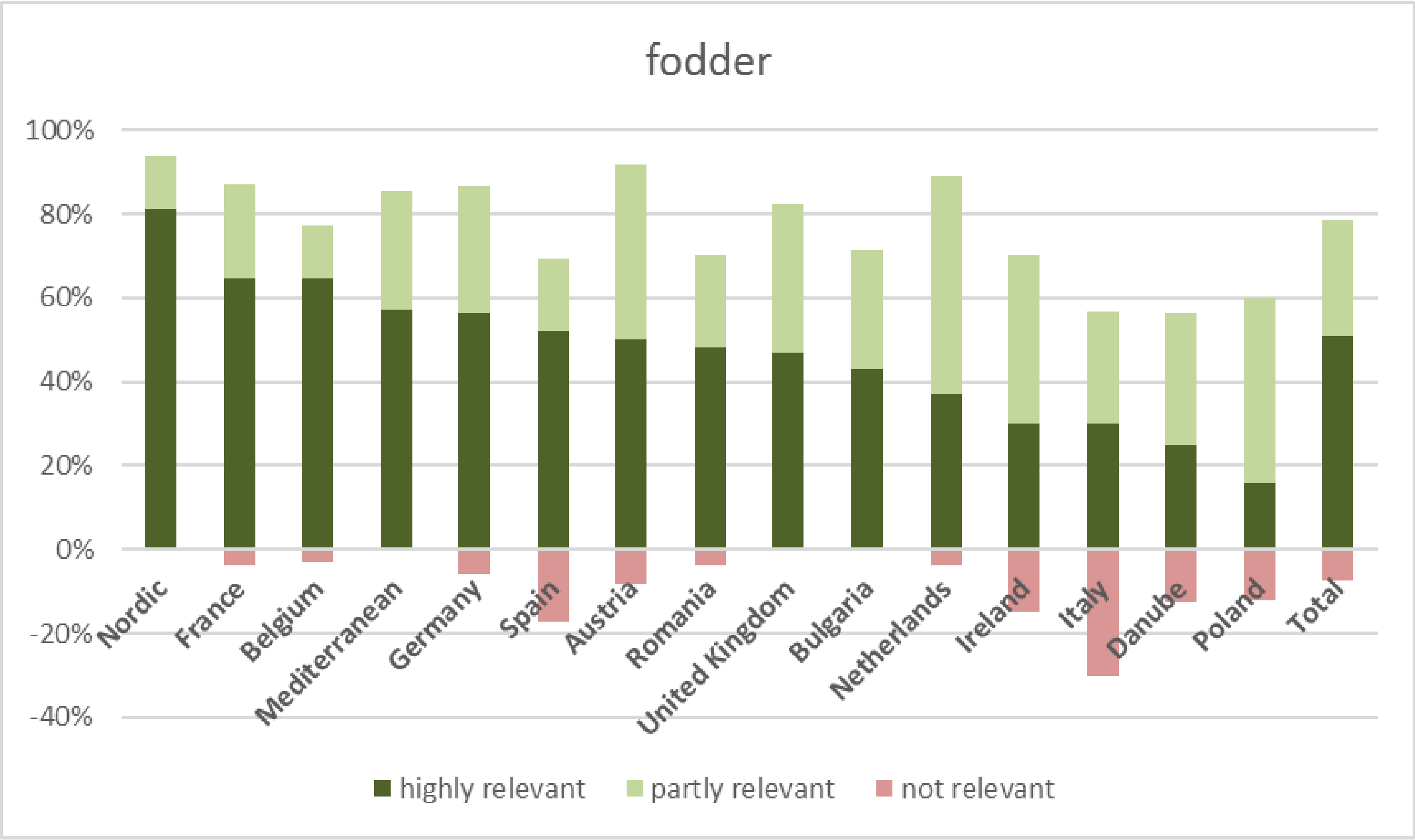


Soya
Danube region & Mediterranean



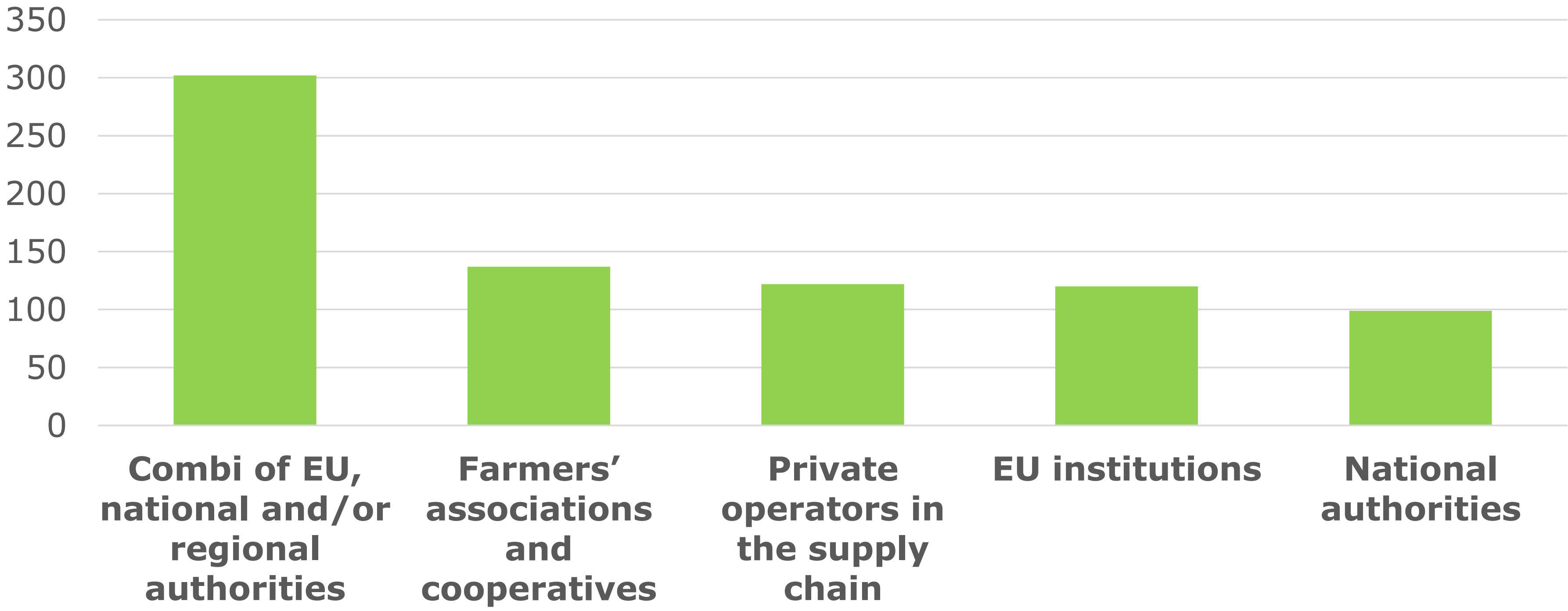
Fodder

Scandinavia and Baltics



Actors for protein plan

Joint effort by authorities and sector



Priorities for protein plan

Highest priority: research and innovation

	Company/ Industry association	Farmer/ Farmers' association	Research & academia	NGO & Consumer Organisation	national or regional authority	Other	Total
Research and innovation	67%	69%	85%	51%	77%	67%	71%
Yield improvement	60%	67%	46%	58%	67%	47%	58%
Protein quality	64%	45%	52%	53%	57%	63%	55%
Profitability/price	59%	68%	37%	23%	43%	67%	52%
Agricultural practices	40%	57%	59%	63%	60%	63%	54%
Environmental benefits	41%	64%	56%	70%	53%	53%	55%
Food supply chain	25%	29%	42%	33%	40%	40%	33%
Feed supply chain	57%	32%	36%	49%	43%	30%	43%
Food market demand	16%	19%	21%	21%	7%	13%	18%
Feed market demand	25%	22%	12%	14%	13%	17%	19%

Research priorities
Breeding and sustainability first priorities

Research priorities
Breeding (yield improvement)
Breeding (nutrition)
Environmental benefits
Sustainable cropping (rotation)
Use of pesticides / nutrients
Breeding (better harvesting)
Breeding (value chain)

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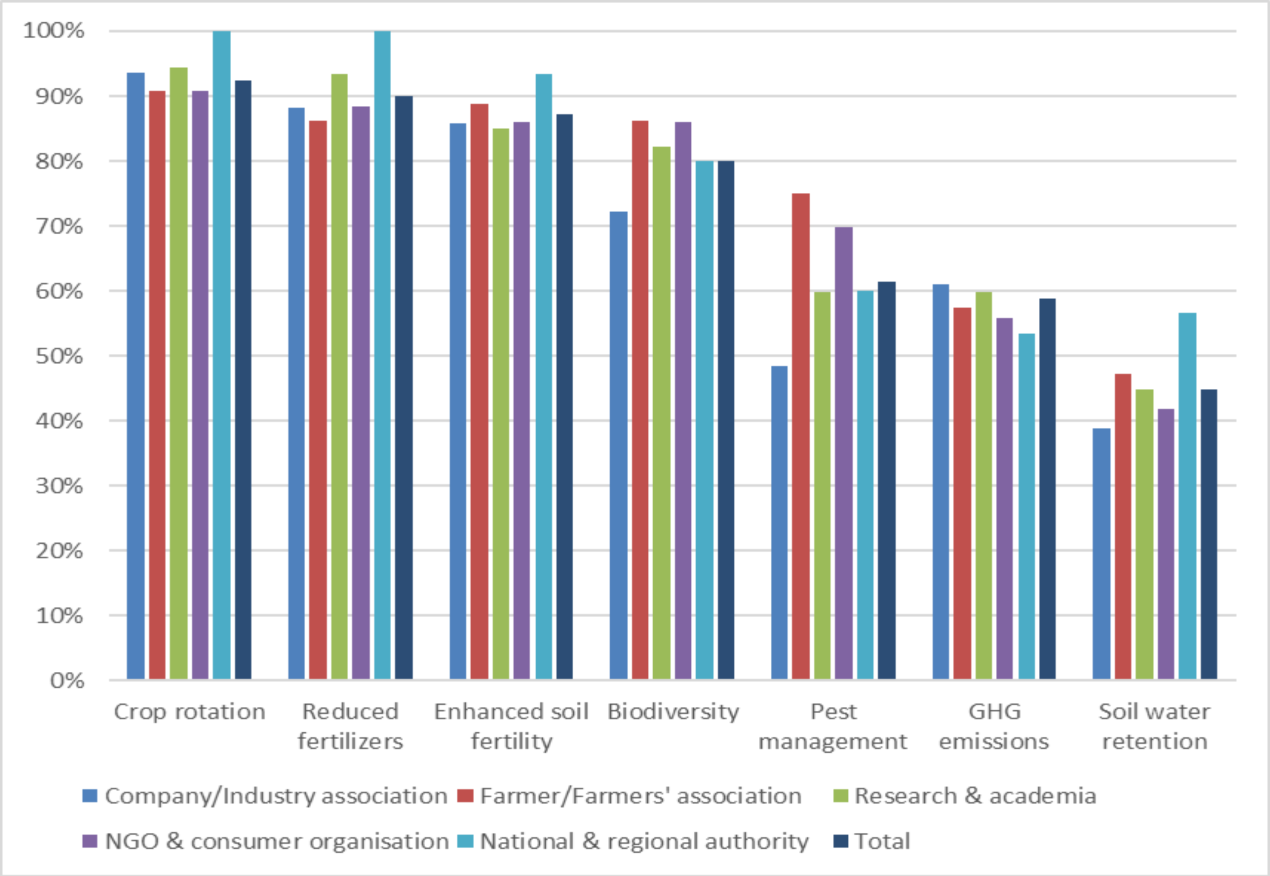
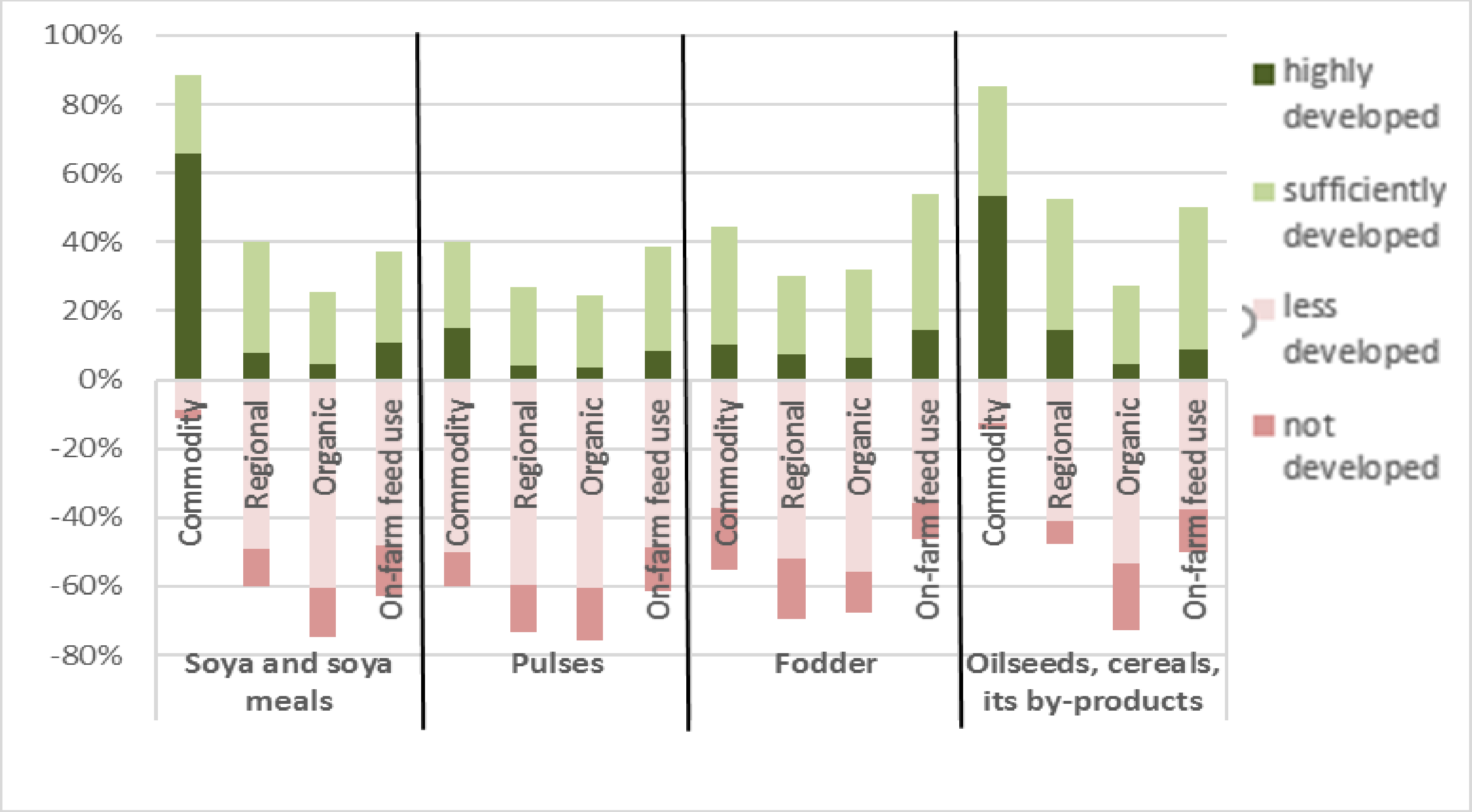
Agronomic and environmental benefits
Crop rotation, reduced fertilizers & soil fertility



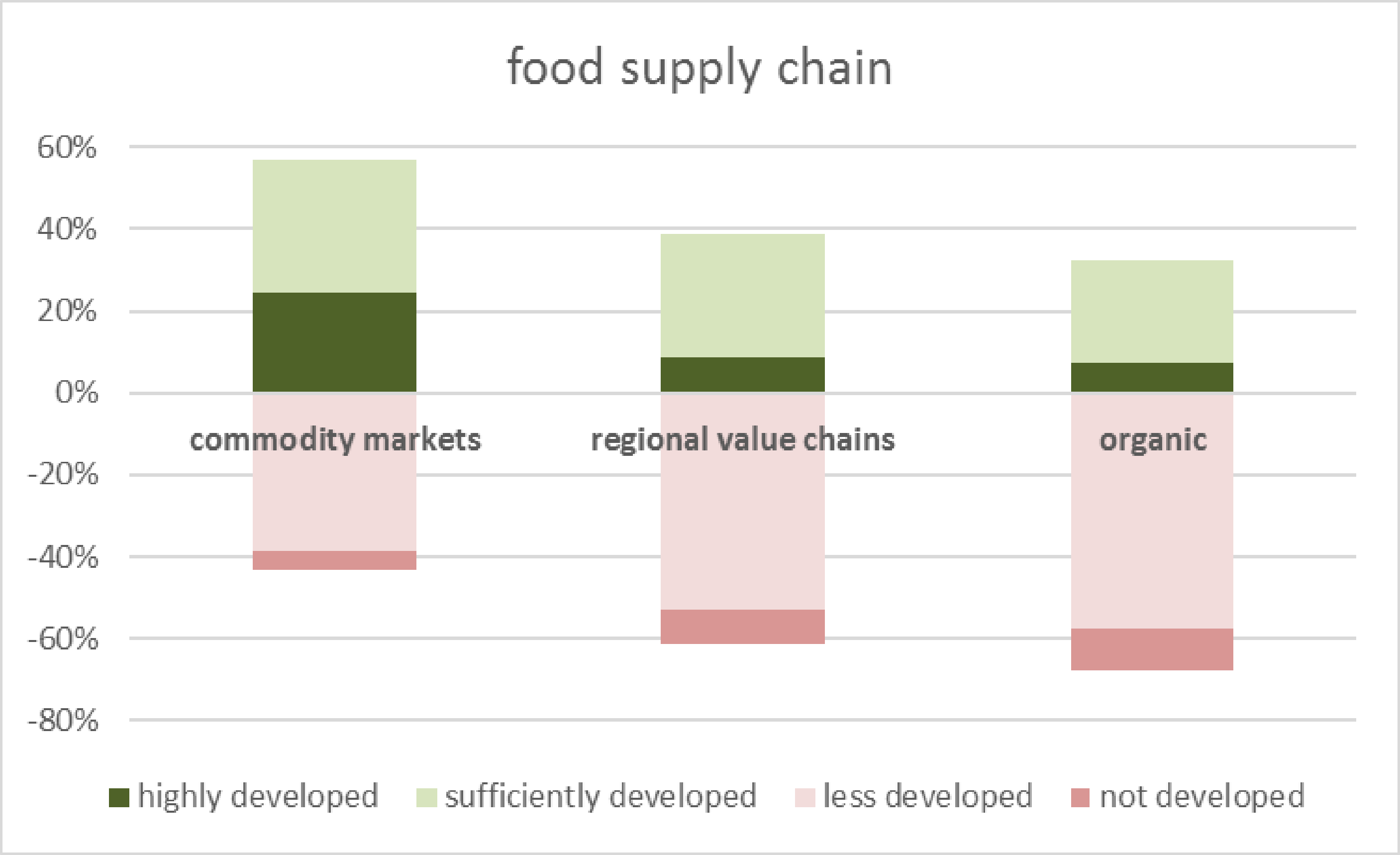
Feed supply chains

Commodity markets soya & oilseed most developed
Organic least developed



Food supply chains

Needs further development in general



Actions - Market Study

- Started on 1st March for a total duration of 9 months but **preliminary final report by 31st August**

- **Objectives:**

  - To **quantify current** supply and demand for plant proteins in different markets segments

  - To **qualify future** growth potential in different market segments

Analysis will include different uses (feed, food, others), different sources (crops, by-products), different origins (imported, EU sourced)

Methodology will include available data + selected interviews

Existing market data/information welcome!

Actions - Thematic Workshops

1. **Research and Innovation**
   - 24/25 April in Brussels, Belgium
2. **Agronomic practices and environmental benefits**
   - 11/12 June in Bucharest, Romania
3. **Supply chains**
   - Early July in France - details t.b.c.
4. **Market Segments**
   - Mid-September in the Netherlands - details t.b.c.

Cooperation with stakeholders

- **Market study:** market information/data welcome (as well as possible contacts for interviews)

- **Thematic workshops:** participation of experts welcome

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Thank you for your attention!

Arable Crops (incl. protein crops) data available at:

https://ec.europa.eu/agriculture/market-observatory/crops_en

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