

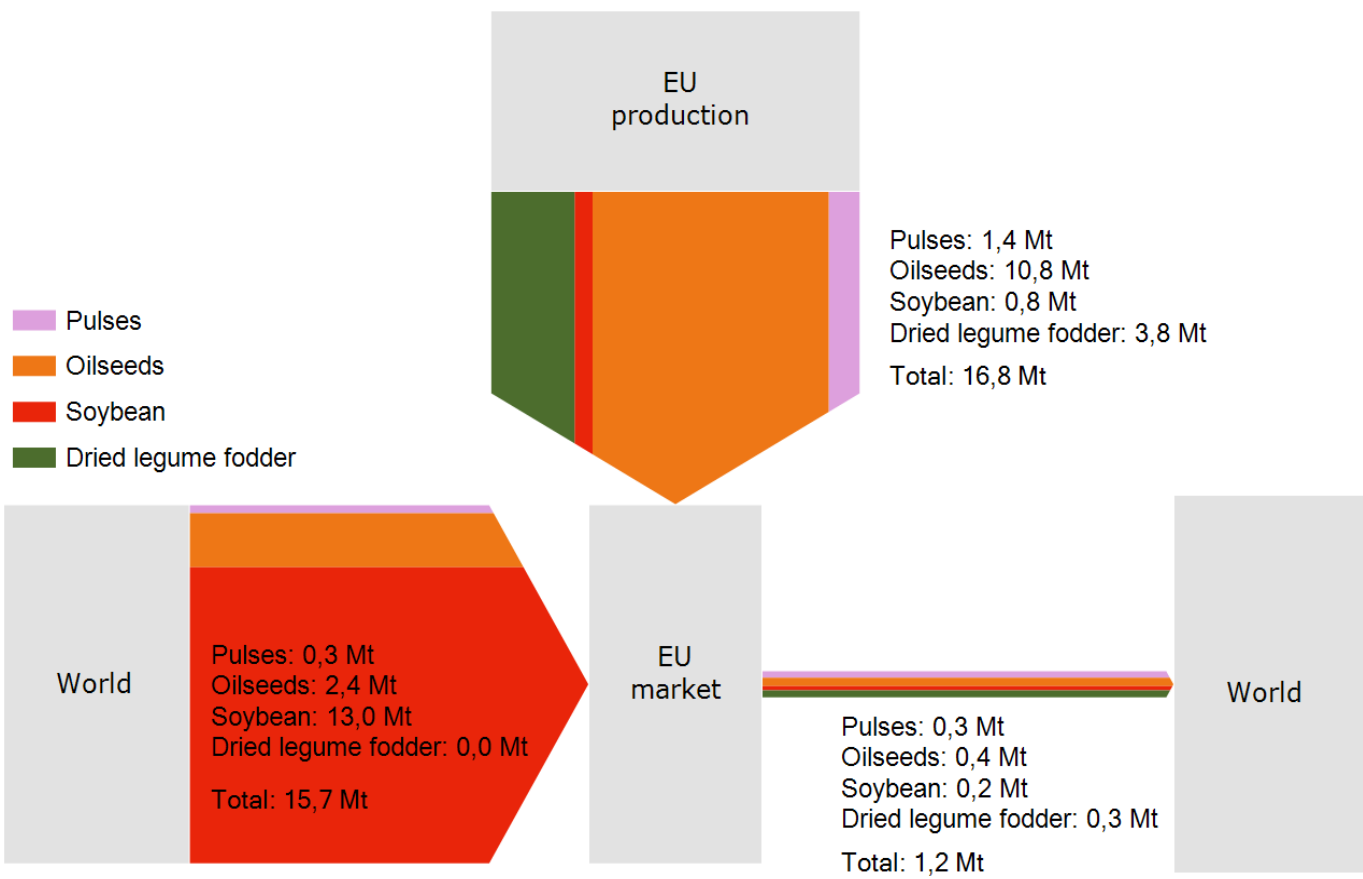


Development of plant proteins in the European Union

9 October 2018

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European Commission
DG Agriculture and Rural Development

Supply and Demand for Protein Crops (2016 in Mt of crude protein)

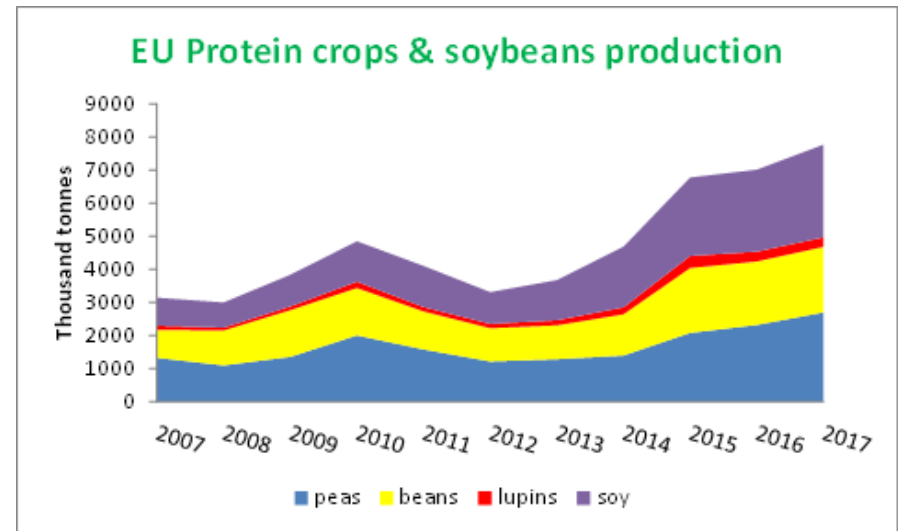
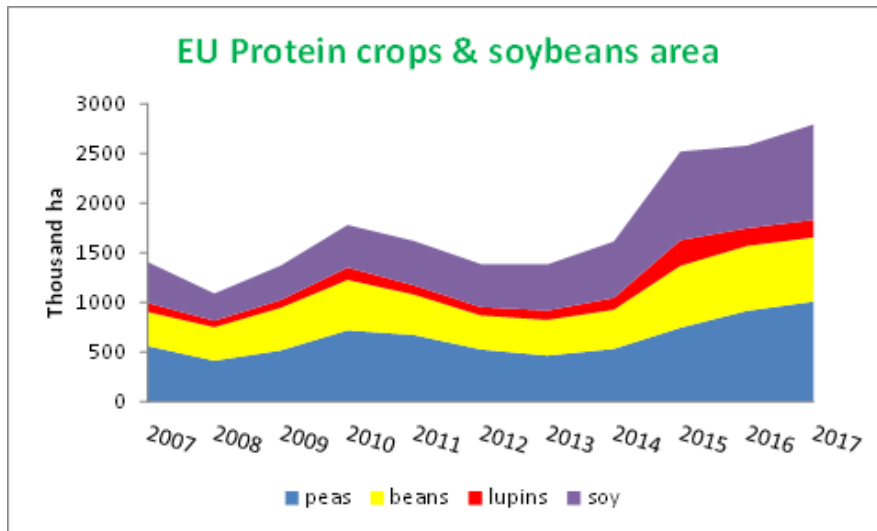


EU protein crops and EU soya production on the rise

Area/production more than doubled since 2013

EU protein crops (peas, beans, lupins): 5 million tonnes

EU soya: 2.8 million tonnes



Actions to establish the Protein Report

4 Expert workshops:

- **April: "research" in Brussels**
- **June: "environment and agronomic practices" in Romania**
- **July: "supply chains" in France**
- **September: "market segments" in The Netherlands**

Member States involved in preparation:

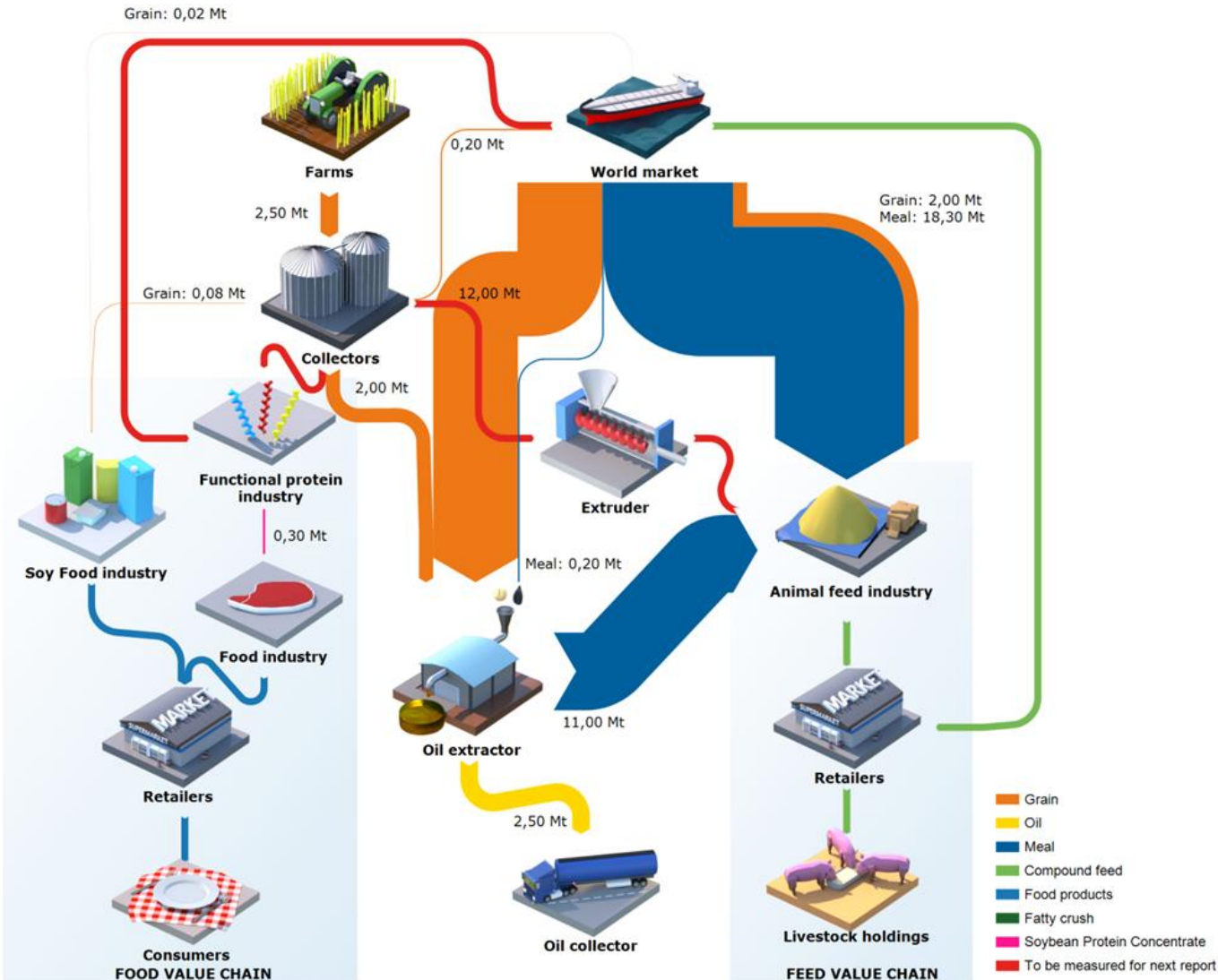
- **France**
- **Austria**
- **Romania**
- **Italy**
- **The Netherlands**
- **Germany**
- **Denmark**

Stakeholder survey:

- **444 replies from experts**
- **research and innovation highest priority**
- **Supply chain development**
- **Joint efforts of actors necessary**

Externally contracted market study

Supply chain soya

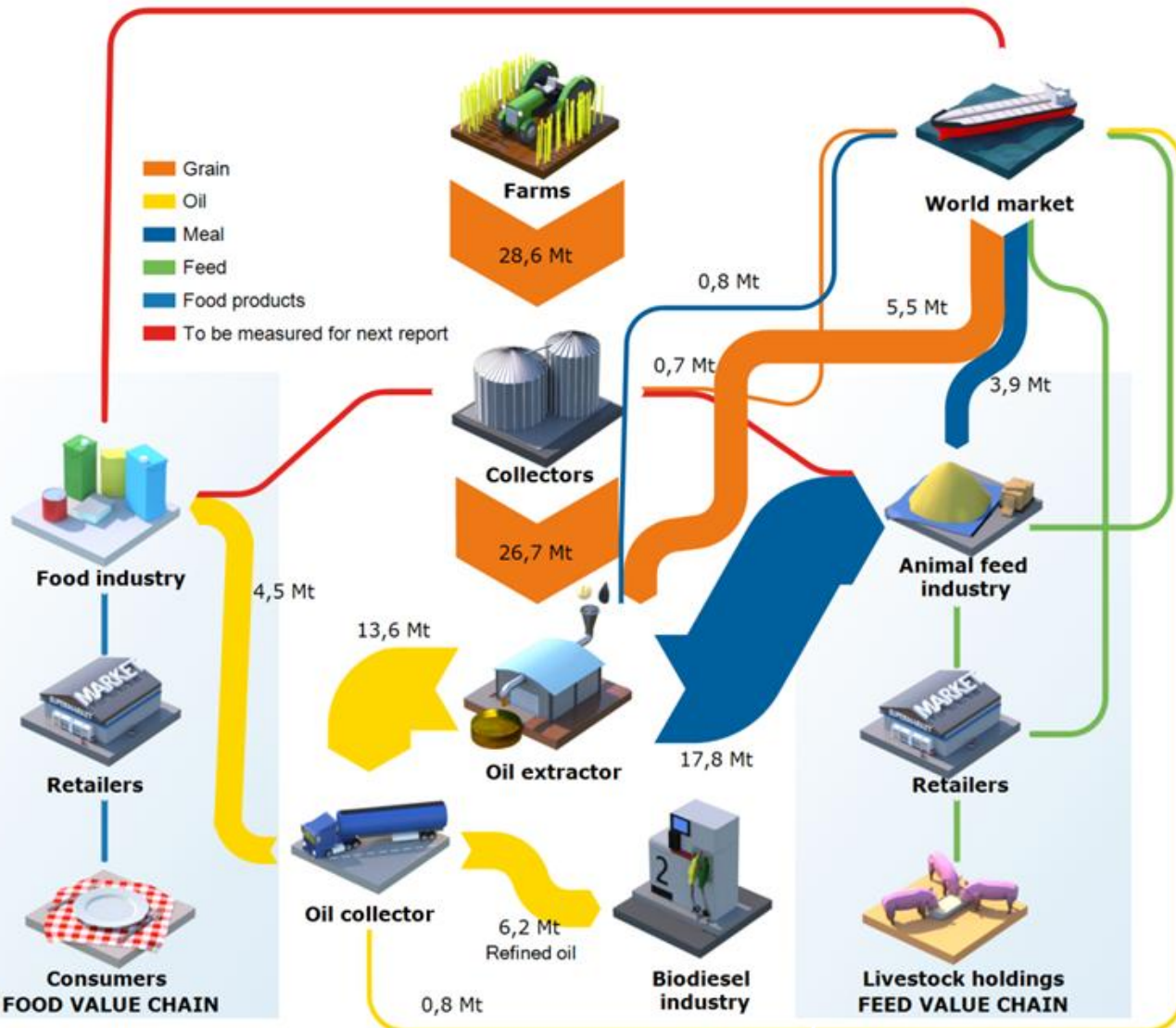


95% is import,
both beans and
meals

Mainly for feed

Food is non
GM, mainly EU
sourced

Supply chains other oil seeds

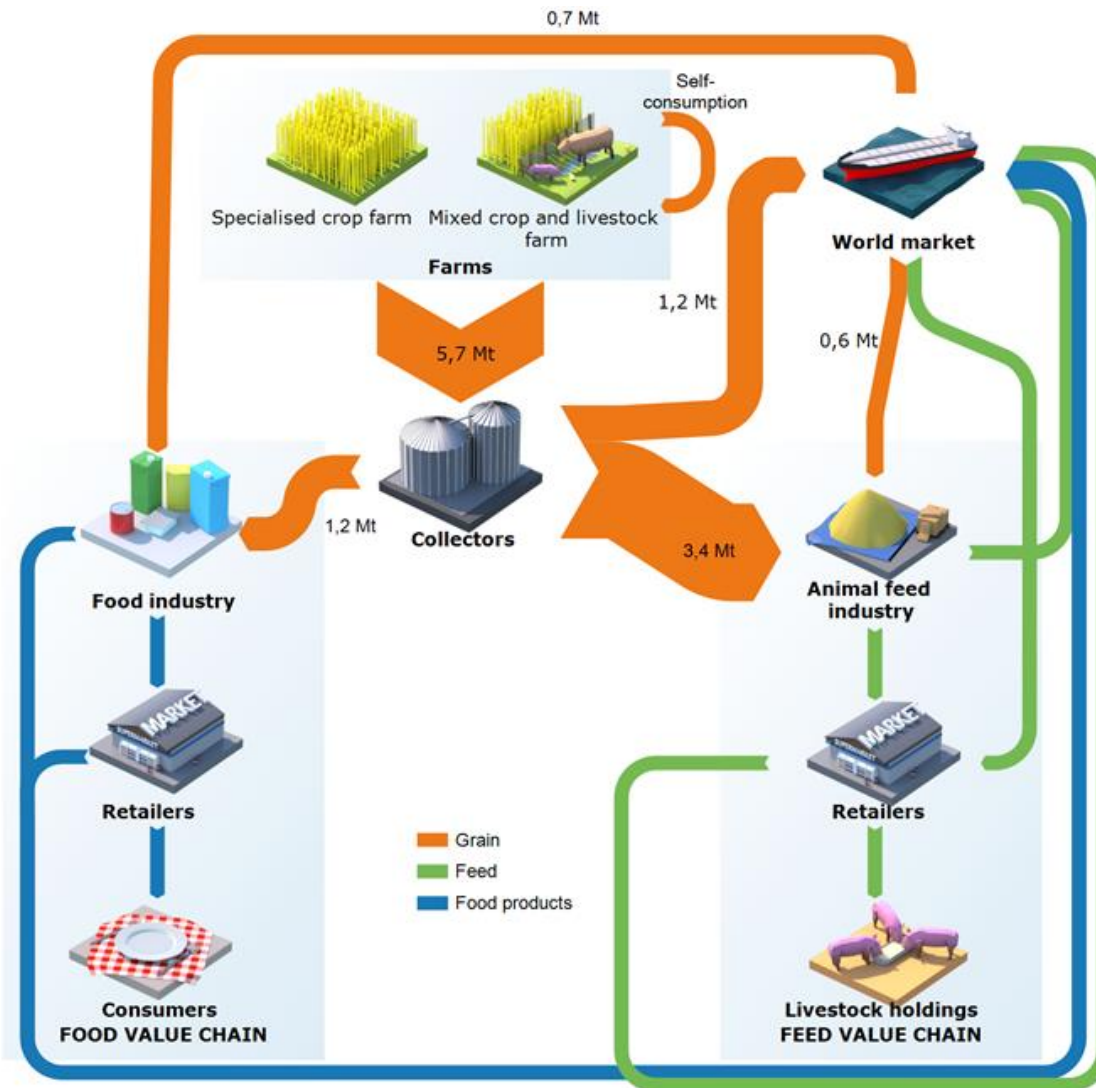


80% EU sourced
Mainly Rape seed

Strong link with RED-II
(biodiesel)

Meals for feed, mainly dairy

Supply chain pulses



25% for food
(Mediterranean)

Export also for food
(India, Egypt)

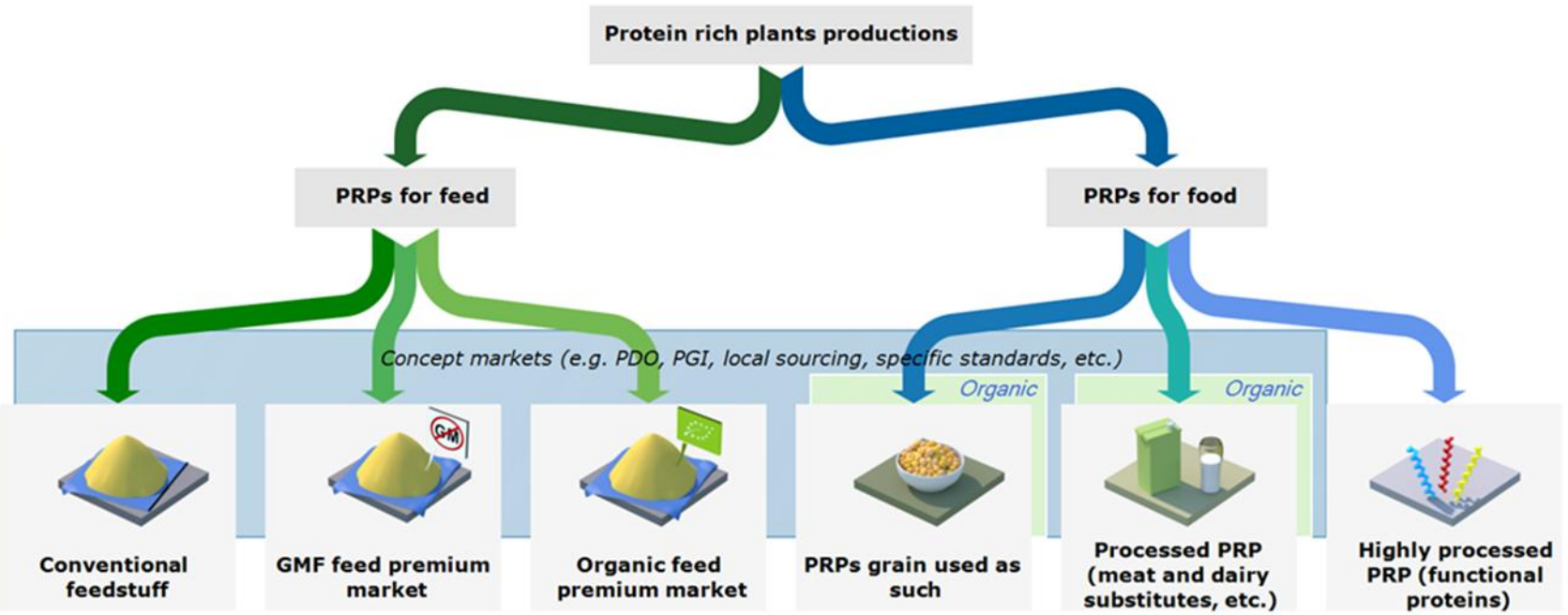
Feed more in North
Europe

Relative important
in organic farming

Market segments

Markets for PRPs products

Market segments



Drivers and Trends in feed markets

Conventional feed	Premium feed (non-GM, organic)
Drivers	
Price	Consumer demand (health, environment)
(year round) availability	Value added (extra margin for producer/brands)
Protein & amino acid content	Labelling
Trends	
Shift livestock production to Poland, Romania, Spain	Non-GM milk (Germany, Austria)
Shift market to premium/sustainable segments	More sustainable (poultry)meat and eggs
	Growing organic demand (Scandinavia, Germany, Austria)

Drivers and Trends in food markets

	Pulses as food	Meat and dairy replacements
Drivers		
	Flexitarians	Flexitarians
	Supply chains with multi-annual commitments	Supply chains with multi-annual commitments
	Mediterranean and ethnic foods	GM free → EU sourced
Trends		
	Growing demand as meat alternative	Growth of 7% annually
	Research in taste and easiness of cooking	Improved availability in supermarkets
	Decrease in diets with traditionally higher shares of pulses (mediterranean)	Both main food companies and private labels

Policy (CAP) instruments today

- Greening: crop diversification, Ecological Focus Areas
- Voluntary coupled support (16 Member States)
- Rural development measures (supply chains, link to EIP-AGRI operational groups)
- Strengthening of farmers in supply chains: facilitation of recognized PO/APO the joint production and selling in all sectors
- Research: European Innovation Partnership (EIP-AGRI) (14 programmes), Horizon 2020 (4 programmes)

Policy (CAP) instruments of tomorrow?

- Strengthening of farmers in supply chains: Directive on Unfair Trading Practices
- CAP strategic plans: needs analysis, setting of objectives
- Sectorial programmes for other products
- Enhanced conditionality: crop rotation instead of diversification
- Eco schemes (voluntary for farmers, mandatory for MS)
- Coupled income support
- Rural development: agri-environmental measures, innovation, knowledge transfer, investments
- Research: Horizon Europe

Commission report on "Development of Plant Proteins in the EU"

- Current supply and demand situation of plant proteins in feed & food
- Market developments & drivers in the different segments for feed and food use
- Environmental benefits & agronomic practises
- State of play in plant protein research
- EU Policy Instruments and Initiatives of Member States
- Recommendations

Further information

The EU plant protein website:

https://ec.europa.eu/agriculture/cereals/development-of-plant-proteins-in-europe_en