THE DEVELOPMENT OF PLANT PROTEINS IN THE EUROPEAN UNION

26 June 2019

Silke Boger
DG Agriculture and Rural Development
Self-sufficiency revisited...

EU self-sufficiency per protein source
(in crude proteins)

- Imports: 22%
- Roughage: 100%
- Crops (Cereals and Oilseeds): 90%
- Other Co-products (e.g., Co-products from the Starch, Distillers and Brewing industries): 91%
- Oilseed meals: 26%
EU Feed Protein Balance 2018/19

EU plant protein supply: share of protein sources

- Roughage: 45%
- Oilseed meals: 24%
- Crops: 22%
- Other co-products: 6%
- Other: 3%

Total: 86 million tonnes (crude proteins)
Area shares for protein crops in the EU

Member States’ area shares for protein crops in 2017

Share of protein crops per MS
- Field peas
- Field and faba beans
- Lupins
- Other dry pulses (lentils, chickpeas)
- fodder legumes (alfalfa, clover)
- Soya
- Other oilseeds (sunflower, rapeseed, linseed)
- No or too limited production

Source: Eurostat
Year: 2017
Calculations: DG AGRI
Cartography: DG AGRI GIS TEAM 11/2018
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Three main market segments for plant proteins

Conventional compound feed – largest market, smallest potential

Premium feed – strong growth rates in some MS

Food – good profit margins but niche market
Agronomic, environmental and climate benefits of legumes

**Benefits:**
- Fertilising effect in crop rotation
- Increase yields of following crops
- Improve soil condition
- Break pest cycles
- Positive effects on biodiversity

**Challenges:**
- Yield variability and yield gaps
- Relatively demanding on agronomic practices (pest and weed control)
- Low agronomic expertise
- Environmental benefits not automatic
Research priorities

- Breeding
- Environmental benefits
- Sustainable cropping
- Use of pesticides / nutrients
- Supply chains
Main current CAP instruments supporting protein plants:

- Greening (27 MS include legumes to fulfil EFA requirements)
- VCS (16 MS have notified VCS for protein crops, 12% of budget)
- Rural Development Programmes:
  - AECM (3 million ha notified)
  - Knowledge transfer
  - Advisory services
  - Innovation
  - Cooperation
  - Investments
- School schemes, recognised producer organisations, GIs
CAP instruments and initiatives today

- **Member State initiatives**, e.g. national plans in
  - Germany
  - France
  - Poland

- **National Policy initiatives closely linked to protein**, e.g.
  - Dutch Food Policy and
  - Danish National Bioeconomy Panel

- **European Soya Declaration**
Conclusions

Main drivers for future development of EU-grown plant proteins:

- Relative competitiveness versus other crops and non-EU plant proteins
- Supply chain development and producer organisations
- Recognition of legume’s contribution to environmental and climate targets
- Evolving consumer behaviour and preferences
- Influence of other policies and debates in society (deforestation, SDGs, Renewable Energy Directive, European Bio Economy Strategy)
Way forward: 1 CAP Strategic plans

Support Member States with the design of their CAP strategic plans

Possibilities to focus on protein plants:
• Set up producers organisations and sectorial programmes to strengthen supply chains;
• Reward the environmental benefits of legumes through Eco-schemes and other management commitments under rural development programmes;
• Knowledge transfer/technical assistance for protein crop production.

Workshop with Member States on 1 and 2 July in Brussels
Way forward: 2 Research & Innovation

In the stakeholder survey considered the most important topic
• Yield improvement and stability
• Taste, digestibility and amino acid content
• Supply chain improvements

Future Instruments may further strengthen the sector
(Horizon Europe €10 billion for the agri-food sector planned, EIP-AGRI)
Way forward 3-5

3. Market analysis and transparency
   Improve data and price collection (work at different levels: IGC, EU Protein Balance Sheet, market transparency initiative)

4. Promotion
   Promotion benefits of plant protein for nutrition, climate and environment

5. Knowledge exchange
   1. Many initiatives in the EU at regional level
   2. Set up a European Platform to bring actors together