THE DEVELOPMENT OF PLANT PROTEINS IN THE EUROPEAN UNION

26 June 2019

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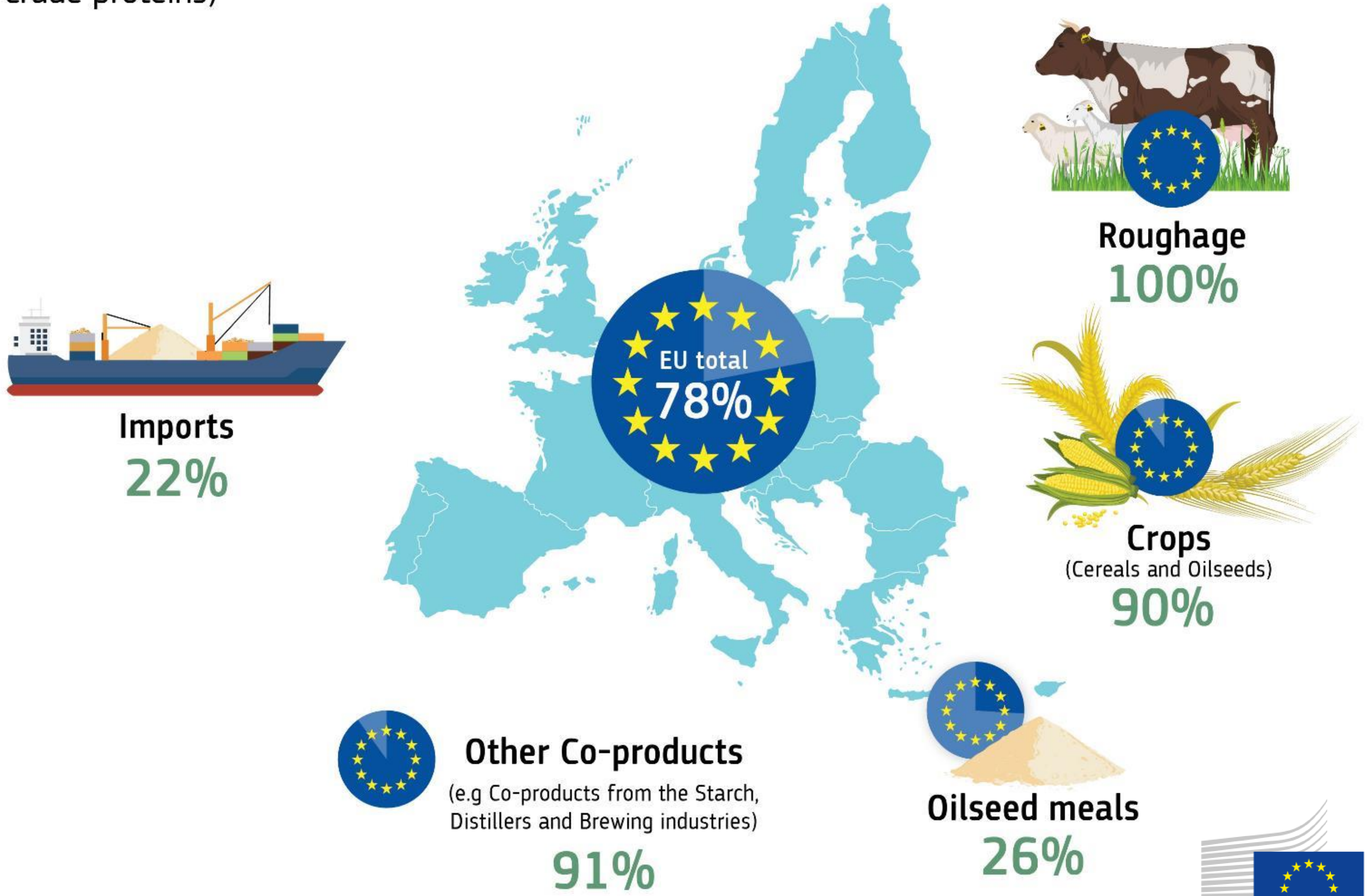
European Commission

Self-sufficiency revisited…

EU self-sufficiency per protein source

(in crude proteins)



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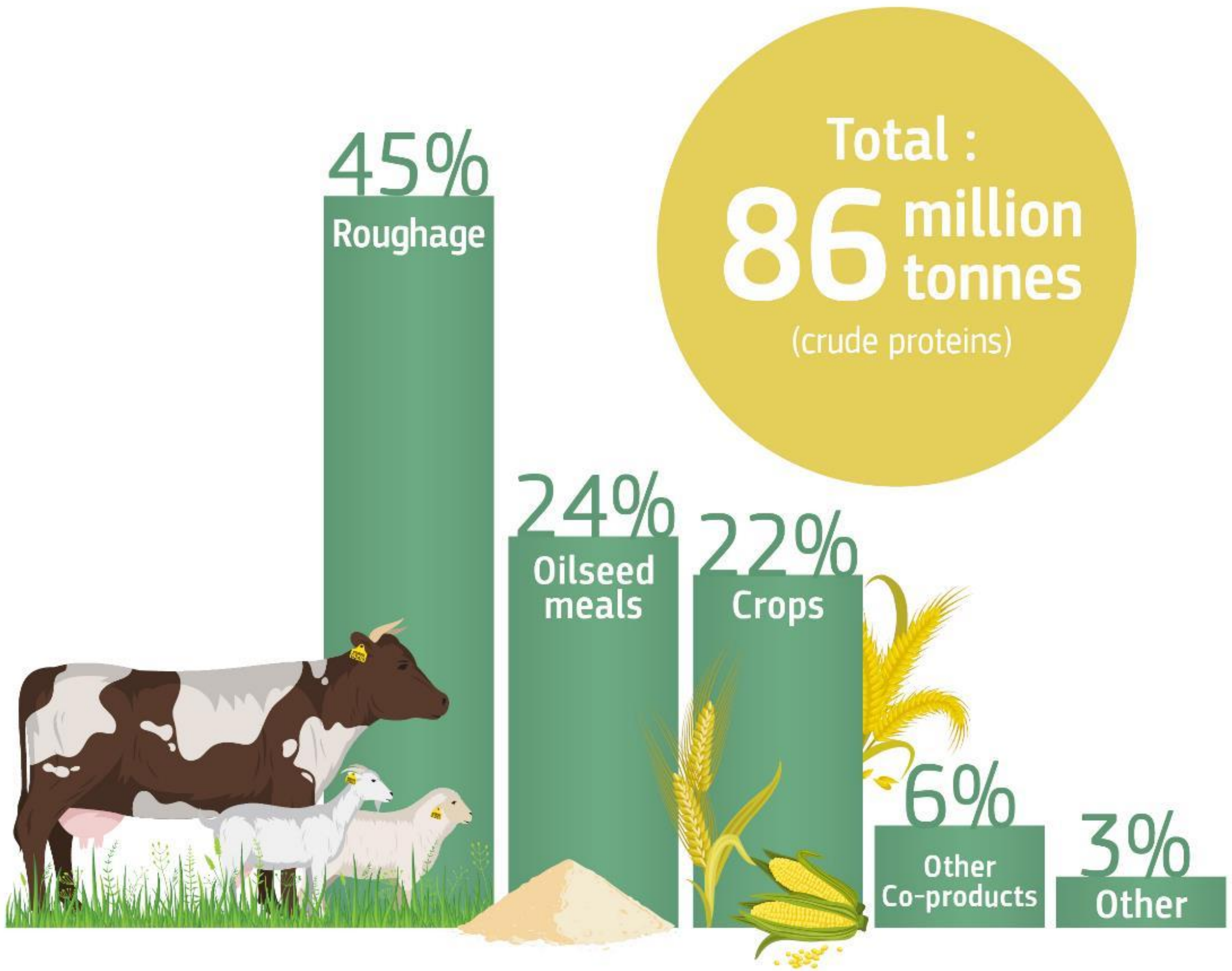
EU Feed Protein Balance 2018/19

EU plant protein supply: share of protein sources



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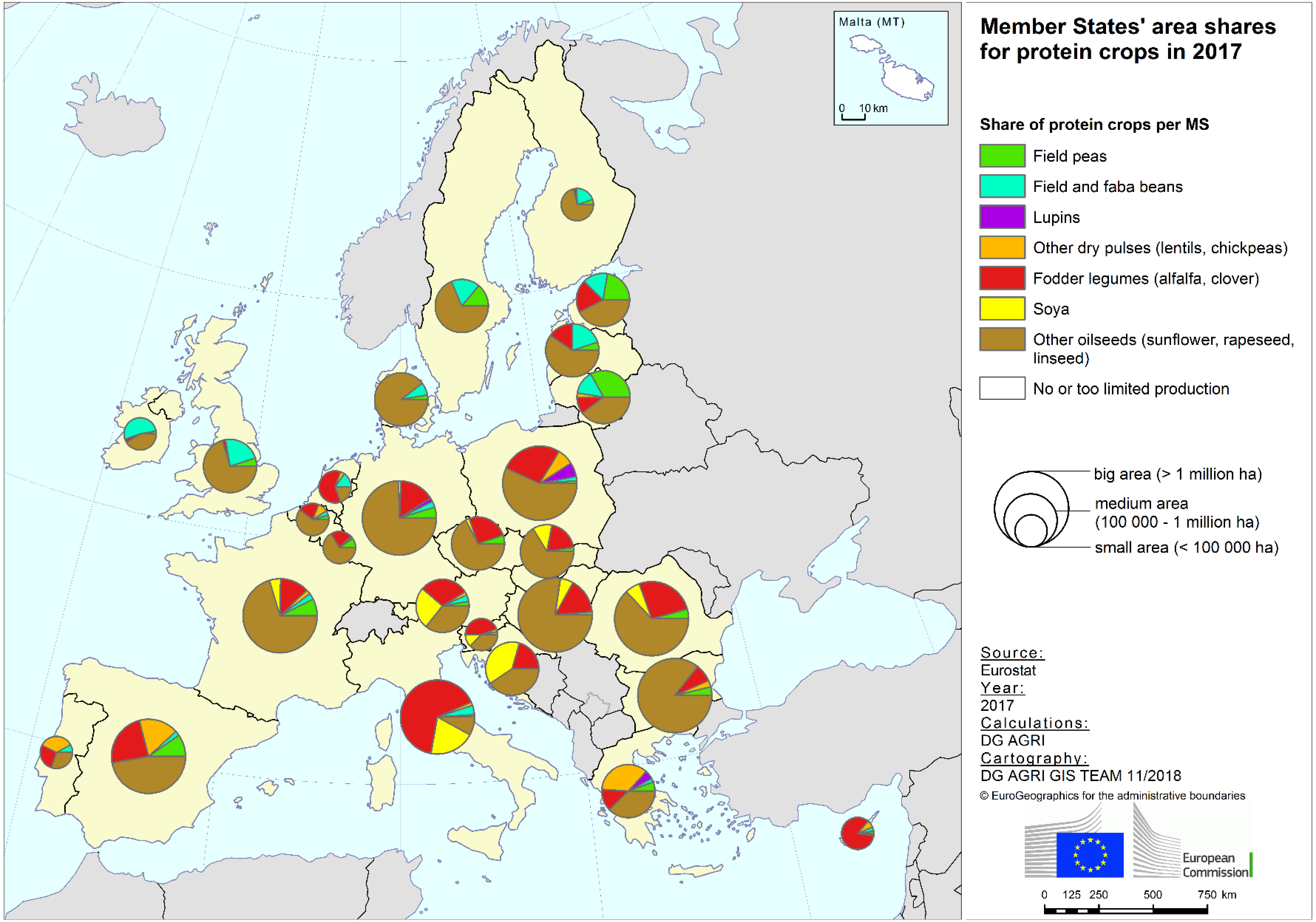
Area shares for protein crops in the EU



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

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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 & Innovation

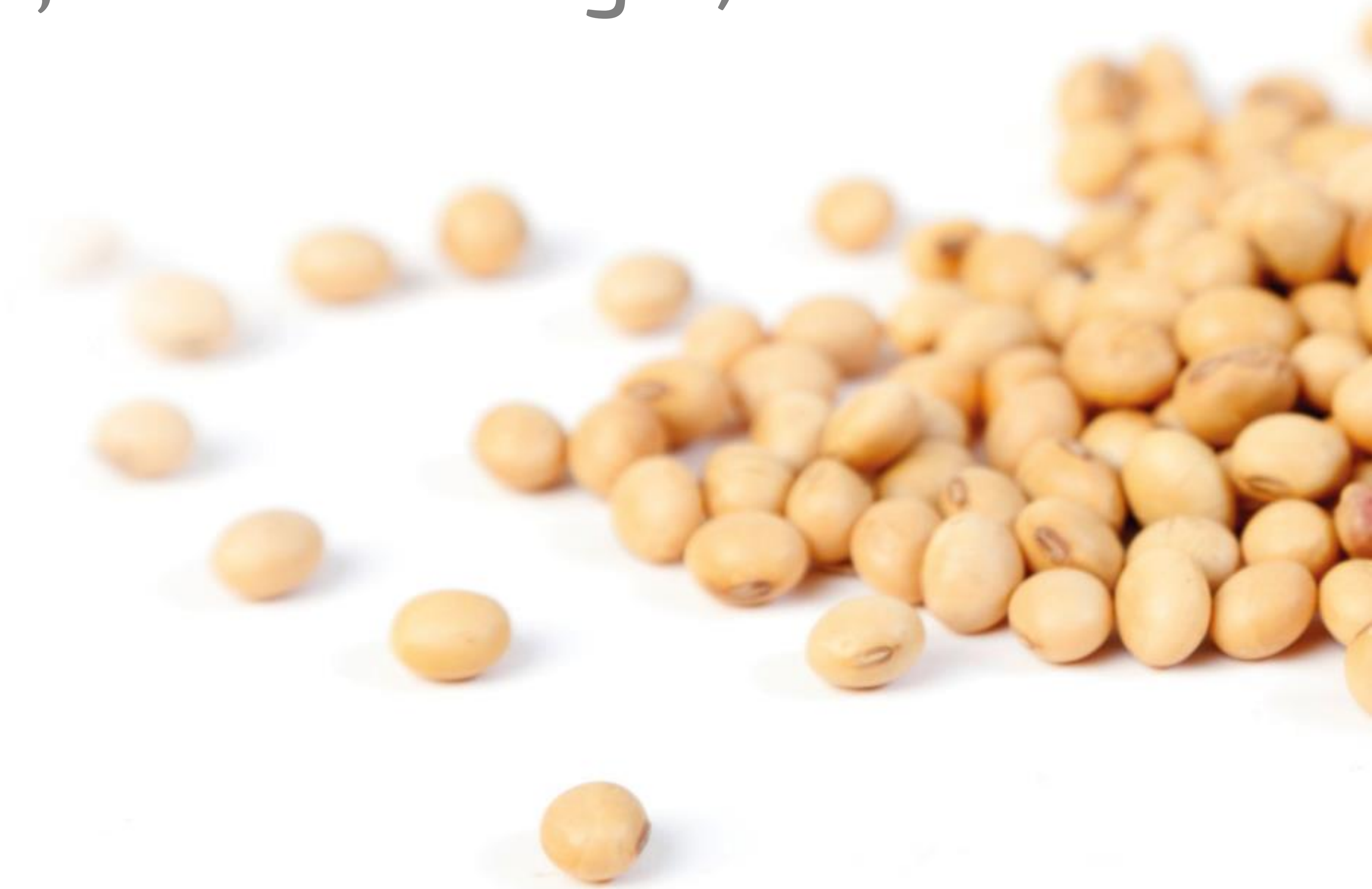
Research priorities

- Breeding
- Environmental benefits
- Sustainable cropping
- Use of pesticides / nutrients
- Supply chains

CAP instruments

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

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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

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