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Member State Initiatives

The transition to a more sustainable and resilient protein-supply system requires coordinated action at all governance levels and across policy fields and the whole food chain. Several initiatives at national and regional level related to sustainable and resilient protein supply and demand are already being implemented. Those initiatives aim to increase the production and use of local protein crops for food or feed, support a higher uptake of plant-based products, develop new protein sources, or strengthen the value chain.

This factsheet presents an overview of current and planned national and regional initiatives in this domain. Its purpose is to supplement the information with concrete examples from Member States that have existing or planned initiatives seeking to change their protein economies. This factsheet is not a full assessment of the initiatives of all Member States, but an overview of relevant policy actions taken across the Union. It serves to emphasise that the actions of individual Member States and their regions are central to effectively change our common food system.

16 Member States replied to a survey on the state of their protein initiatives, launched by the Commission in June-July 2023. It sought to list and understand initiatives in Member States regarding plant-based protein, including initiatives concerning plant protein supply, alternative proteins, and the demand for protein in the livestock sector and in the human diet. The survey was complemented by additional direct feedback and research on specific protein strategies.

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Fact #1: Protein initiatives exist in many Member States.

While this factsheet focuses on those Member States that indicate having protein initiatives in the survey, this does not mean that Member States who did not reply are not active in this policy area. Where there were no initiatives listed, this was often attributed to a lack of resources and to differing policy priorities.

Most of the Member States who report having initiatives have several of them. 80% of the participating Member States declare having initiatives that target protein use for food and feed. Two Member States declare having one initiative, seven have between two and five initiatives, and four Member States have more than five initiatives.

Fact #2: Protein initiatives exist mostly at national level, with a wide range of targeted groups.

Protein initiatives are frequently developed at national level. These national initiatives may be embedded in a Member State's CAP Strategic Plan, in a dedicated national strategy, or in another format. Member States also host regional as well as city-level initiatives. Initiatives at subnational level are important to empower all the actors for a transition towards a sustainable and resilient EU food system and can have a great impact in restructuring of value chains, fostering innovation, and contributing to customer acceptance.

Fact box: ERIAFF

The Network of European Regions for Innovation in Agriculture, Food and Forestry (ERIAFF), which groups regional authorities across Europe, set up a Working Group on plant-based proteins. This Working Group works on challenges identified by the regions regarding plant protein production and development, for both food and feed. The shared objectives of the working group are to increase the demand and the supply of plant-based products, and cooperate in plant protein production and research, consumer awareness, and European autonomy in plant-proteins for food and feed.

One of the main challenges that ERIAFF has found through different regional projects is the bottleneck of scaling processing and making alternative proteins, co-products, and plant proteins available. For example, in the region of Flanders, Belgium, challenges arise when new plant proteins are cultivated, but the processing facilities or techniques do not meet the new demand, or they are not willing to adjust for new, often at first small scale, production. A collaboration between the Flanders Research Institute for Agriculture, Fisheries and Food (ILVO) and Flanders' FOOD' The Food Pilot' was created as a response to help different actors in the value chain with their issues on product development, process optimisation, or technical production. The Food Pilot gives advice, provides laboratory analyses, and pilots trials with processing equipment for these actors.

Source: ERIAFF Working Group Plant-Based Proteins - contribution EU protein policy review, <http://www.eriaff.com>.

Fact #3: The focus of protein strategies varies by Member State.

Several Member States initiatives focus on the entire value chain and its different levels simultaneously. Other Member States have created strategies focused on specific aspects of the protein system.

Fact box: France

France has created a comprehensive protein strategy that tackles challenges related to proteins at different levels and from differing perspectives. In total, France has more than five protein initiatives, which include both regional and national measures. Some of those measures also have an environmental, economic, or nutritional dimension. The initiatives cover supply and demand aspects of food and feed, with a focus on cereals, pulses, oilseeds, and their side products. The strategy is expected to improve diets, to enhance the economic realities of farmers by developing domestic production and creating more outlets for their produce, to limit the negative environmental impacts of imported deforestation and the use of chemical fertilisers in crop rotations, and to lower overall imported emissions.

To build a comprehensive strategy, France identified key challenges that can hinder the protein initiatives. To be successful, a strategy must be complementary and collaborative between plant and animal sectors and avoid the creation of animosity and competition between sectors. More than 350 stakeholders ranging between research institutes, nature conservation associations, and representatives of companies were consulted to create the national action plan the next 10 years. The France Relance post COVID recovery plan financially supported this comprehensive protein strategy.

Source: European Commission survey of Member States

Fact #4: Member State initiatives cover a wide range of subjects.

Many Member State initiatives that focus on plant proteins take various forms and are targeting both food and feed, and supply and demand. The range of products covered includes oilseeds, roughage, and plant-based co-products, among others. A few initiatives also cover alternative proteins and non-plant sources of protein. Initiatives that centre on agronomic practices are also many, covering themes such as crop rotation, catch crops, organic farming, fertiliser use, and plant protection products.

Fact box: Denmark

Denmark has sixteen protein initiatives. Many of these initiatives are connected to seven of Denmark's twelve agricultural funds, which promote projects related to the development of plant proteins.

One of these initiatives is the Plant-Based Food Grant, which supports plant-based companies, initiatives, and projects from 2022 to 2030, with a total budget of approximately EUR 90.5 million. The fund seeks to impact the whole value chain and to support development, education, research on plant-based products, and to strengthen the sales and exports of plant-based foods.

Another Danish initiative focuses on green biorefining through the use of plant protein from grass and clover. about EUR 35 million are budgeted for this project from 2022 to 2026, seeking to develop new plant-based protein sources for food and feed. This initiative aims to promote a more sustainable and locally produced source for feed, and to decrease the amount of imported soya bean, as well as to develop grass proteins as a source for food.

Source: The Plant-Based Food Grant, www.plantefonden.lbst.dk/the-plant-based-food-grant

Fact #5: A large share of Member States have initiatives concerning feed demand.

Most initiatives that focus on feed demand cover three categories: feeding strategies (including compound feed and self-sufficiency), the environmental sustainability of the livestock sector (including greenhouse gas emissions, eutrophication, and circularity), and social and economic sustainability (including animal welfare). Other aspects include areas such as promotion and education, and consumption patterns.

Fact box: Germany

In some Member States, national protein initiatives focus on increasing information to support policymaking and actors involved in the protein value chains.

For this purpose, the Federal Information Centre for Agriculture in Germany created a feed protein balance sheet. This balance sheet details the sources and quantities of protein used as feed in Germany. It analyses the share of different feed sources in the overall supply, as well as the type of protein: in marketing year 2021/2022 roughage accounted for 55% of all feed, cereals for 15%, rapeseed meal 18% and the remaining share was formed by pulses, oilseeds, co-products, and non-vegetables. The balance sheet is useful to evaluate the changes occurring in protein supply and demand over time at a federal level, as well as to assess the significance of specific feed sources. Additionally, the balance sheet shows a so-called “protein gap” of 18%, which reveals the share of feed protein that is imported. The balance sheet for marketing year 2021/2022 shows that 82% of all feed protein in Germany is of domestic production.

Source: The Federal Office for Agriculture and Food – Protein Balance [Sheet](#)

https://www.ble.de/DE/BZL/Daten-Berichte/Futter/Futter_node.html#doc9764130bodyText3

Fact #6: Many food initiatives promote the consumption of local products.

Several Member States have initiatives focus on protein food demand. These initiatives often cover plant-based foods such as cereals, pulses, fruits and vegetables, or plant-based alternatives to animal products. Most initiatives aim to increase production, and to promote sustainable production practices, health and nutrition, research and innovation, and consumer acceptance. Other themes include improving value chains, food safety, pricing, and regulating the production and marketing of alternative protein.

Fact box: Finland

In Finland, there are a few different initiatives that address plant proteins for food. One of these is the Leg4Life project (Legumes for a Sustainable Food System and a Healthy Life), a research-based initiative, that involves a variety of stakeholders, with the goal to improve the consumption of legumes in Finland. One aspect of the project investigates the possibilities of supporting consumer choices by implementing changes to eating environments. This ‘nudging’ may involve the order of food presented in canteens (presenting plant-based choices first) or emphasising the availability of plant-based options. In addition, the project seeks to develop processing methods for tasty and easy-to-use legume products for direct consumption as well as for food services.

Source: Leg4Life, <https://www.leg4life.fi>

Fact #7: Some initiatives cover alternative protein sources.

Some topics covered by Member States include alternative proteins. Included in these alternative proteins are topics such as insects, algae, micro-organisms, fermentation, and cultured meat. While most of the initiatives centre on proteins for food, some also include aspects of feed or aim to have a holistic approach to protein supply and demand systems.

Fact box: Bulgaria

Bulgaria reports three national-level protein initiatives. These initiatives focus on the supply side of protein production, mainly targeting producers and processors of proteins, and covering cereals, pulses, roughage, and alternative protein sources.

In addition to initiatives related to protein crops and roughage used for feed, alternative protein sources are at the centre of attention in the form of a possible protein source for food and feed. To support this work, an Association of Insect Producers in Bulgaria (AIPB) was established to develop the insect-producing sector and support the introduction of a legal framework that would allow the development of the insect breeding sector.

Sources: European Commission survey of Member States; the Dutch Ministry of Agriculture and Food: Agro Reports abroad:

<https://www.agroberichtenbuitenland.nl/actueel/nieuws/2022/05/23/bulgaria-association-of-insect-producers>; Bulgarian news agency BTA <https://www.bta.bg/bg/news/bulgaria/268973-sred-tselite-na-asotsiatsiyata-na-proizvoditelite-i-prerabotvatelite-na-nasekomi>

Scope of protein initiatives by Member State

<i>Member State</i>	Full strategy / Specific initiatives / Not available (N/a)	<i>Supply of plant protein</i>	<i>Feed use</i>	<i>Food use</i>
<i>Belgium</i>	Full	✓	✓	✓
<i>Bulgaria</i>	Specific	✓	✓	✓
<i>Czechia</i>	Specific	✓		
<i>Denmark</i>	Specific	✓		✓
<i>Germany</i>	Specific		✓	
<i>Estonia</i>	N/a			
<i>Ireland</i>	Full	✓	✓	✓
<i>Greece</i>	N/a			
<i>Spain</i>	Specific	✓		
<i>France</i>	Full	✓	✓	✓
<i>Croatia</i>	N/a			
<i>Italy</i>	N/a			
<i>Cyprus</i>	N/a			
<i>Latvia</i>	Specific			✓
<i>Lithuania</i>	N/a			
<i>Luxemburg</i>	Specific			
<i>Hungary</i>	N/a			
<i>Malta</i>	N/a			
<i>Netherlands</i>	Full	✓	✓	✓
<i>Austria</i>	Full	✓		
<i>Poland</i>	Specific			
<i>Portugal</i>	N/a			
<i>Romania</i>	N/a			
<i>Slovakia</i>	N/a			
<i>Slovenia</i>	N/a			
<i>Finland</i>	Specific	✓		✓
<i>Sweden</i>	Specific	✓		